Connecting Strategy, Evaluation, and Learning in Your Organization

Presented by FSG

April 9, 2014
Today’s Agenda

- **Overview of a Strategic Learning and Evaluation System**
  Katelyn Mack, FSG

- **Panelist**
  Rebekah Levin, Robert R. McCormick Foundation

- **Panelist**
  Brenda Solórzano, Blue Shield of California Foundation

- **Panelist**
  Medina Haeri, Oak Foundation

- **Audience Questions & Answers**
  Hallie Preskill (Moderator), FSG

*Follow the conversation on Twitter #StrategicEvaluation*
An Overall Strategy for Learning and Evaluation Has the Potential to Help Organizations…

...connect the dots in the organization to create cohesive evaluation practices

Having more comprehensive and cohesive evaluation practices helps organizations learn from their learning and evaluation activities
Strategic Learning and Evaluation Systems (SLES) Provide Organizations with a Coordinated Approach to Evaluation

Based on the reinforcing relationship between strategy and evaluation...

SLES help organizations describe...

- **Why**
- **How**
- **When**
- **By and with whom**
- **To what extent**

...various programs, initiatives, processes, or policies in the organization will be evaluated and with what resources.
A SLES helps ensure that learning and evaluation activities result in meaningful and actionable information.
Moving from the Abstract to Something Real

Developing a SLES for McCormick Foundation

- Issue Areas: Education, Journalism, Civics, Communities, Veterans
- 500 Acre Park – two museums, two golf courses, hundreds of acres of gardens
- $1.5 B endowment; $50 M grants, $80 M including park
- 2011 – New direction in foundation
- Director of Evaluation and Learning, reporting to CEO

Why did we consider a SLES?

- Abstract notions of increasing impact
- Power of evaluation as a tool for understanding and change
- Goals for Foundation and Grantees:
  - Routinize the use of evaluation
  - Develop evaluative thinking as the norm
  - Develop systems to ensure the application of knowledge gained through evaluation and other activities

Our goals aligned with the true purpose of a SLES
Organization Culture as a Driver Towards and/or Barrier to Learning

**Going Well**

All four ‘pillars’ are moving ahead well (Evaluation Vision, Strategy and Focus, Monitoring and Evaluation Activities; Supportive Environment)
- Organic Process
- Slow down the drive for quick creation
- Evaluative thinking

**Still Working On**

Creating a culture that supports learning
- Making hierarchy more porous
- Challenges to trust
- Willingness to be open

*Adapted from Challenges to the Role of Evaluation in Supporting Organizational Learning in Foundations (Bickel, Millett and Nelson, Council on Foundations, 2002)*
The Circuitous Evaluation and Learning Road in Philanthropy

Reflections on Designing and Implementing a SLES

- Establishing a SLES requires simultaneous work on both the evaluation front as well as the learning culture
- These processes have to grow from within the organization, or they will fail
- These processes require humility, tenacity, tremendous patience, and love
Why a SLES at Blue Shield of California Foundation (BSCF)?

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<th>Who is BSCF?</th>
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<td>• A statewide health funder</td>
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<td>• <strong>Program Areas</strong>: Health Care Safety Net and Domestic Violence</td>
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<td>• <strong>Population Focus</strong>: Vulnerable communities in CA</td>
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<td>• <strong>Budget</strong>: $30M grant making and programmatic budget; 10% dedicated to learning and evaluation</td>
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<td>• <strong>Role</strong>: Chief Program Director</td>
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<th>Why did we consider a SLES?</th>
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<td>• Strong desire to become a “learning organization,” for example:</td>
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<td>– Develop a culture of asking questions</td>
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<td>– Support experimentation and creativity</td>
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<td>– Increase trust between leadership and staff</td>
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<td>• Be able to tell the story of our impact</td>
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<td>• Ad-hoc approach to evaluations</td>
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<td>• Lack of clarity on how to move evaluation and learning work forward</td>
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SLES Mixed Bag: Successes and Works in Progress

### Going Well

**Strategy and Focus**
- Cross departmental logic models tied to shared organizational outcomes

**Evaluation Vision**
- Answers the "why"
- Simple and clear

### Still Working On

**Supportive Environment**
- Building organizational culture
- Identifying and deploying needed human and IT resources

**Monitoring and Evaluation Activities**
- Performance measures that define success and how it will be measured
It’s about the SLES journey, not just the destination!

Reflections on Designing and Implementing a SLES

- Building a culture of learning across the organization is critical
- All SLES elements are needed
- Be creative about the data sources
- This work takes time and requires flexibility and iteration
- On the road to becoming a learning organization
SLES Serves as a Roadmap For Implementing Our Strategy

Why did we consider a SLES?

- 2011 – IAWP developed its first ever strategic plan
- 2012 – SLES was integrated into the strategy to serve as a road map for its implementation
  - Flexible, adaptive, and mindful of limited resources (ours and our grantees)
  - Test underlying assumptions driving the strategy
  - Integrate learning and feedback from our grantees
  - Share our learning with the field

Developing a SLES for Issues Affecting Women Programme, Oak Foundation

- Focus on women rights, notably in the areas of violence against women and movement building
- 2014 grantmaking budget = $12.2 million USD
- 4 Staff Members (3 programme staff + 1 administrator)
- No dedicated M&E staff or budget – learning, monitoring, and evaluation is integrated into programme work
The Value-Added Versus the Additional Work Load of Bringing a Learning Frame to Your Work

### Going Well

SLES was very well received by grantees and other partners in the field:

- Received useful and relevant feedback to our learning questions
- 1st annual “SLES Update Report” produced in September 2013

IAWP is able to adapt strategy and assumptions based on learning:

- Learning Summit – three days dedicated to reviewing and articulating our learning and adapting our strategy as needed (“built-in” learning time and space)

### Still Working On

Challenge to fully integrate SLES into the foundation’s grantmaking forms and processes:

- It is still an add-on that we send to grantees which results in additional work for us and them

Challenge to develop evaluation methodology to track global outcomes and impact:

- To date, learning has focused more on process & unpacking our assumptions
- Next step is to evaluate clusters to understand impact

A positive IAWP experience is sharing with other programmes in the foundation to encourage learning approach to M&E
Integrate Learning From the Start and Don’t Stop

Reflections on Designing and Implementing a SLES

- Benefit of integrating SLES design into strategic planning process is saving time and resources
  - Cadillac\smart-car approach

- Important to harmonize internal forms and processes with SLES

- Most important value of SLES for IAWP is the “forced” time for reflection on learning as a team
Audience Q&A

Rebekah Levin
Robert R. McCormick Foundation

Brenda Solórzano
Blue Shield of California Foundation

Medina Haeri
Oak Foundation

Hallie Preskill
FSG

Katelyn Mack
FSG
Thank You!

• Thank you for joining the conversation today

  – Please take a moment following the webinar to complete our exit survey

  – The presentation slides and other resources are available for download at www.fsg.org/SLESwebinar

  – If you would like to access the recording of today’s webinar, you can do so using the same log in information you received when you registered