What’s the Difference?

How Foundation Trustees View Evaluation
Trustees care deeply about impact. Understanding results is part of their fiduciary duty. As foundations strive to improve performance, advance accountability and share knowledge, their desire for evaluation — reliable data on organizational effectiveness — grows.

**EVALUATION ISN’T MEETING OUR NEEDS.**

Trustees wish that current approaches generated more useful information. In too many cases, foundation evaluation practices don’t align with trustee needs.

**IT CAN WORK BETTER.**

Trustees across the United States believe there are ways to improve how we determine the effectiveness of social investments. Many are already using proven, practical approaches today.

*FSG Social Impact Advisors, with funding from The James Irvine Foundation, interviewed dozens of foundation trustees, CEOs and evaluation experts to uncover critical issues and exciting ideas related to evaluation. This document shares highlights from these interviews.*
I'M HERE TO MAKE A DIFFERENCE.

Trustees are personally and passionately motivated to make a difference. While some hold a perspective that “if the grant sounds good, we've done our job,” the vast majority feel a weighty responsibility to themselves, their staff and their communities. They want to learn from past results to ensure that foundation resources are being used to achieve the greatest possible effect.

EVALUATION IS PART OF OUR JOB.

Trustees take their fiduciary duties very seriously. And, they see evaluation as an important part of fulfilling these duties. They feel that spending foundation assets wisely is just as essential as investing and managing them wisely.

WHEN IT COMES TO EVALUATION, OUR ACTIONS DON'T ALWAYS MATCH OUR CONVICTIONS.

While trustees say evaluation is important, many admit that it gets lost in the shuffle as they press onward with projects. Those interviewed say it would help to set clearer, more concrete goals and strategies that build in evaluation from the start. They say evaluation deserves more time, attention and resources than it currently receives.

MANY EVALUATION APPROACHES DON'T DO THE JOB.

The way foundations pursue evaluation often doesn't meet trustee needs. Conducted by academics and social scientists, many evaluations result in long reports where key insights are buried and lost to busy trustees from the worlds of business, politics and nonprofit leadership. Some are summarized so briefly that their meaning is diluted. Some evaluation findings are purely retrospective and do not inform future grantmaking decisions. They often come too late — after the next round of grants is already out the door. Poorly aimed, packaged and timed reports chip away at the usefulness of evaluation, leading some trustees to view the practice as an excessive administrative cost.
What Trustees Want
FROM EVALUATION

THE TRUTH CAN BE UNCOMFORTABLE.
Trustees, staff members and CEOs are all personally invested in foundation projects and programs. They want them to succeed, and because reputations and legacies factor into this desire, they sometimes find it painful to face and disclose grim results. Evaluators who are hired by foundations also hesitate to share negative findings candidly with their clients. Though these conflicts of interest often go unspoken, they are real, and they threaten the existence and utility of evaluation.

EVALUATION SHOULD BE PRACTICAL AND FOCUSED ON LEARNING.
While some trustees critique today’s evaluations as ill-timed and unfocused, others see potential. They envision a new type of evaluation: It’s forward looking and directly tied to upcoming decisions. It’s multifaceted and pragmatic in practice. It reports back in real time to allow for midcourse corrections. It feeds organizational learning and offers insights that other foundations across the field can run with for a progress-accelerating ripple effect.

GIVE ME A CLEAR, BIG PICTURE — WITH NUMBERS.
Many trustees are strategists. They have experienced analytical rigor in business and academia, and they know it helps them make tough calls on when to hold on and when to get out. But it’s a mistake to mire them in details. To make informed decisions, trustees need salient facts about large investments, most often at the program strategy or foundation level and less often about individual grants. They also want information on relevant external trends. Stories are good for conveying emotion and context, but for many trustees, numbers paint a more telling picture. Social impact may be difficult to describe with quantitative data, but according to trustees, this is no excuse not to measure.

IT’S MORE ABOUT RESULTS THAN RECOGNITION.
Getting credit for a job well done is nice, but it shouldn’t be the reason for doing evaluation. Most trustees want evaluations to tell them whether the foundation’s efforts have contributed to the goals they set out to achieve. Some observed that no one organization has the resources to make the difference, so it’s more important to focus on the progress being made than on whether the change can be attributed to their foundation’s intervention.

Foundation boards and staff often experience a conspiracy of graciousness.
Eugene Cochrane, President
The Duke Endowment

You don’t wait until a project is complete to see what you’re getting.
Lise Yasui, Trustee
William Penn Foundation

The board wants high-level findings, and information on the rigor of the evaluation. They look at it from 30,000 feet… in their role as strategists.
Risa Lavizzo-Mourey, Trustee and CEO
Robert Wood Johnson Foundation

Our board is realistic, and the trustees know that in some areas we will never be able to attribute success solely to our contribution.
Christy Pichel, President,
Stuart Foundation
HELP ME CHAMPION EVALUATION.

When trustees have accurate expectations for what’s achievable (and what’s not) through evaluation, they can help drive demand for it and hold foundations accountable for results. Trustees can help make evaluation a worthwhile endeavor by:

- Asking questions early on about program design, goals and milestones, and how the evaluation will measure success
- Expecting staff to use data in shaping plans and guiding implementation
- Making time at board meetings to discuss the results of past grants and the implications for the future
- Using evaluation results to inform judgments about resource allocations and strategic decisions
- Being efficient about information requests: asking for only the data they’ll use and taking advantage of information other funders have already gleaned from grantees

The trustees want to learn about the type of grants they should be making, and how effective our investments are. They want to know the impact of what we’re doing and see tangible, bottom-line outcomes.

Dr. James Knickman, CEO
New York State Health Foundation

What Trustees Want FROM EVALUATION

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SOURCES

The Evaluation Kit for Trustees is a project of FSG Social Impact Advisors, with funding from The James Irvine Foundation. It is based on interviews with foundation trustees, CEOs and evaluation experts from across the country, as well as findings documented in From Insight to Action: New Directions in Foundation Evaluation, a report on emerging approaches to evaluation in the philanthropic field produced by FSG and funded by The William and Flora Hewlett Foundation. Irvine engaged Williams Group to develop this kit to help foundations and their trustees act upon the research findings.

FSG Social Impact Advisors is an international nonprofit consulting and research organization dedicated to accelerating social progress by advancing the practice of philanthropy and corporate social responsibility. (www.fsg-impact.org)

The James Irvine Foundation is a private, nonprofit grantmaking foundation dedicated to expanding opportunity for the people of California to participate in a vibrant, successful and inclusive society. (www.irvine.org)

Williams Group helps people and organizations do better through communication. The firm plans, designs and manages strategic communications programs for a variety of nonprofit and corporate clients. (www.wgsite.com)

ADVISORY BOARD

We would like to thank the members of this project’s Advisory Board for providing their guidance and feedback.

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Jim Knickman President and CEO New York State Health Foundation
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INTERVIEWEES

The following foundation trustees, CEOs and evaluation experts participated in interviews for this project.

**Annie E. Casey Foundation**
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Thomas Kelly, *Manager of Evaluation*

**Association of Baltimore Area Grantmakers**
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**California Wellness Foundation**
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**Claude Worthington Benedum Foundation**
William Getty, *CEO and Trustee*
Newt Thomas, *Trustee*

**The Duke Endowment**
Eugene Cochrane, *President*

**Gordon E. and Betty I. Moore Foundation**
Ken Moore, *Director of Evaluation & Technology, Trustee*

**The Grable Foundation**
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**Harry C. Trexler Trust**
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**NeighborWorks**
Tracey Rutnik, *Evaluation Expert*

**New York State Health Foundation**
Jim Knickman, *President and CEO*

**Patrizi Associates**
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INTERVIEWEES (continued)

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Robert Wood Johnson Foundation
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Rockefeller Brothers Fund, Inc.
Stephen Heintz, President and Trustee

The Skillman Foundation
Carol Goss, President and CEO, Trustee

Skoll Foundation
Roger Martin, Director
Sally Osberg, President and CEO, Director

Stuart Foundation
Stuart Lucas, Director
Christy Pichel, President

Unihealth Foundation
Mary Odell, President

Wachovia Regional Foundation
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Eleanor Horne, Director
C. Kent McGuire, Director

Wallace Foundation
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Walter and Elise Haas Fund
Pamela David, Executive Director

William Penn Foundation
Michael Bailin, Director
Feather Houstoun, President
Chris James-Brown, Director
Lise Yasui, Director

Woodcock Foundation
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(also Trustee of the Acumen Fund, REDF, Rockefeller Philanthropy Advisors, and Phalarope Foundation)
Steven Liebowitz, Program Fellow

To learn more, please visit www.fsg-impact.org/ideas/item/trustee_evaluation_tools.html

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