



Impact, Measurement, and Evaluation

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Description

Impact is often an elusive concept in philanthropy. What is the most effective way to monitor grants? How do families define and measure success? What is the burden on grantee partners and how might it be mitigated? Successful family philanthropies employ a formative framework for impact that typically involves a process to define the sought-after change, an alignment of grantmaking practices to the desired end-result, a strategy to monitor and evaluate progress with grantee patterns, and a reflection on how to leverage impact. In this webinar, learn how to adopt a formative approach to measurement and evaluation and explore the considerations for high impact philanthropy.

Replay Link

View the webinar [replay here](#).

Summary and Resource List

Definitions and Key Phrases

Giving families can evaluate:

- Impact of a specific grant or a cluster of grants
- Progress towards key goals and objectives
- Overall foundation strategy
- Foundation practices and governance

There are different words that speak to the various aspects of the evaluation process:

- **Monitoring:** Generally, monitoring refers to outputs, and particularly checking in to see what has been accomplished throughout the grant. *What happened? Did grantees do what they proposed they would?*
- **Measurement:** Measurement typically refers to figuring out what is quantifiably measurable, and then using these quantifiable measurements to understand impact and revisit strategy. *How much, how many?*
- **Evaluation:** Evaluation generally speaks to understanding the impact or “so what” of a philanthropic investment. It is an understanding of progress, success, impact. *So what? What is the impact?*
- **Assessment:** Assessment is typically a reflection on how to improve the practices in place to achieve goals. *How did we do? How can we improve?*

Understanding outputs and outcomes is also helpful when thinking about impact, measurement, and evaluation.

- **Outputs:**
 - Indicate an activity happened, not the effects it had
 - Are often expressed as nouns and can be counted (e.g., # of participants in a program)

- Often near term and easy to measure (e.g., # of articles published, # events held)
- **Outcomes:**
 - Indicate effects of an activity, often expressed with comparative adjectives (e.g., improved, decreased)
 - A specific change we hope to see towards an end goal
 - Varying time horizons, less attribution (e.g., *improved water quality, increased voter participation*)

Terms and definitions sourced from the “Impact, Measurement, and Evaluation” webinar transcript and presentation by Lisa Spalding, The Philanthropic Initiative.

Webinar Takeaways

Funders embark on an evaluation and assessment strategy for accountability, to understand their impact, and to learn and adapt over time.

- Many funders want to monitor the progress of their investments—to be aware of what their grantees accomplish and be sure they are doing what they set out to do. Funders also want to be accountable themselves, and want reasonable assurance that they are making the impact they set out to achieve.
- Donors want to know and communicate out the specific impact of their grantmaking. Evaluations help giving families quantify (to a certain extent) the positive and negative impacts of their strategy, and where to continue to invest.
- Assessment helps grantee partners strengthen their work, make course corrections, and adapt to changing circumstances. Funders can use an evaluation strategy to test their hypotheses and theories of change, and revisit what works and what doesn’t through this information.

There are particular challenges and tensions within evaluation work that should be acknowledged.

- *What is measurable is not always most important, and what is measured can influence outcomes.* Simply because something is easily quantifiable or measurable does not mean it is the most crucial element in creating impact, and it can shift the focus of evaluation to less important outcomes.
- *There are long time horizons for most social change work, and changing external circumstances and contexts that affect evaluation.* Given the long time horizon for seeing impact towards vast issues like climate change, educational outcomes, poverty, it begs the question of how long funders should evaluate their work to see real outcomes come to life. External circumstances affect this work and must be considered in evaluation.
- *Funders are individual actors in a large ecosystem, and identifying their specific impact can be complicated.* It can be very complex to understand the effects of a sole funder or specific interventions within a large ecosystem of funders, other actors, and the evolving structures and contexts maintaining the issue in the first place. With so many variables, it is hard to target and understand the specific elements that are creating outcomes within a large system.

There is an important, growing trend towards equitable evaluation that seeks to reframe the sector's standard practices around evaluation and further advance equity.

- It is important for funders to think critically about how they show up in this work with grantees and community members, and to reconsider some of their default practices.
- The Equitable Evaluation Initiative built an [Equitable Evaluation Framework](#) to help practitioners understand and reorient to a commitment to equity in their evaluation practices and broader thinking.

Resources

- [A Guide to Actionable Measurement](#) (The Bill and Melinda Gates Foundation, 2010)
- [A 'Mischaracterization' of the Movement Toward More Equitable Evaluation \(Letter to the Editor\)](#) (The Chronicle of Philanthropy, 2020)
- [Building Equitable Evidence of Social Impact](#) (MilwayPlus, 2021)
- [CEP's Definition of Philanthropic Effectiveness](#) (The Center for Effective Philanthropy, 2021)
- [Collecting Data with an Eye Toward Equity](#) (PEAK Grantmaking, 2021)
- [Equitable Evaluation Framework](#) (Equitable Evaluation Initiative)
- Equitable Evaluation Framing Paper (Equitable Evaluation Initiative, 2017) (PDF attached on event page)
- [Hiring an External Evaluator](#) (S.D. Bechtel Jr. Foundation, 2018)
- [Making a Difference: Evaluating Your Philanthropy](#) (The Philanthropic Initiative, 2015)
- [Participatory Evaluation: A Path to More Rigorous Information, Better Insights](#) (GrantCraft, 2020)
- [Stanford PACS Guide to Effective Philanthropy: Chapter 6: Theory of Change, Monitoring, and Evaluation: Understanding an Organization's Activities, Outcomes, and Impact](#) (Stanford PACS, 2020)
- [The Step-by-Step Guide to Evaluation](#) (W.K. Kellogg Foundation, 2017)
- [Strategy and Evaluation: The Twin Engines of Effective Philanthropy](#) (S.D. Bechtel, Jr. Foundation, 2020)
- [Three Shifts Philanthropy Needs to Make to Better Design and Evaluate Social Change](#) (GrantCraft, 2019)

Speaker Organizations

- [Center for Effective Philanthropy](#)
- [Center for Evaluation Innovation](#)
- [The Philanthropic Initiative](#)

Featured Speakers



Kat Athanasiades (she/hers) is Senior Associate at the Center for Evaluation Innovation. She brings expertise in advocacy evaluation, network and systems evaluation, and evaluation capacity building. Prior to joining CEI, Kat was a senior team member at Innovation Network, a nonprofit evaluation consulting firm that supports the evaluation needs of foundations and nonprofits. For five years, she led, wrote, and presented on evaluation and research engagements such as coalition and network assessment, immigration reform, and the state of nonprofit evaluation in the US. Before coming to Innovation Network, Kat was part of the impact assessment unit at the Ford Foundation, where she supported their evaluation and continuous learning programs. Kat holds a graduate degree in international affairs from

Columbia University and an undergraduate degree in sociology and anthropology from Swarthmore College.



Phil Buchanan, president of CEP, is a passionate advocate for the importance of philanthropy and the nonprofit sector and deeply committed to the cause of helping foundations and individual donors to maximize their impact. Hired in 2001 as the organization's first chief executive, Phil has led the growth of CEP into the leading provider of data and insight on philanthropic effectiveness.

Phil is author of *Giving Done Right: Effective Philanthropy and Making Every Dollar Count*, published in 2019 by PublicAffairs and named the "Best Philanthropy Book of the Year" by Inside Philanthropy. He is co-host of a podcast, also called *Giving Done Right*, with CEP's Grace

Nicolette. Phil is a frequent blogger for the CEP Blog, author of op eds that have appeared in publications such as *The Financial Times* and *The Boston Globe*, and a frequent commentator on philanthropy in the media.

Phil is co-founder of YouthTruth, an initiative of CEP's designed to harness student perceptions to help educators and funders accelerate improvements in K–12 schools and classrooms. In 2016, he was named the *Nonprofit Times* "influencer of the year" and he has been named nine times to that publication's "Power and Influence Top 50" list. Phil serves on the boards of directors of Philanthropy Massachusetts and the National Council on Aging.

Phil lives in Concord, Massachusetts with his wife and their two daughters.



Lisa Spalding works with TPI clients to increase the impact of their giving through strategic planning, facilitation, social issues research, and design and evaluation of philanthropic strategies and initiatives. She is a seasoned facilitator and convener, having led retreats and trainings for a wide range of foundations around the country focused on strategic planning, succession, governance, and evaluation. She has led numerous workshops and trainings on engaging the next generation, the power of family philanthropy, finding a focus, and exploring your legacy. Lisa has expertise in a variety of issue areas, including those around the environment and sustainability. She also partners with professional advisors to help their clients to reflect on how strategic philanthropy can play a role in their lives.

Prior to first joining TPI in 2009, Lisa spent ten years in the environmental field. Key roles included working with the Ecosystem Management Initiative to help environmental organizations and collaboratives develop evaluation and adaptive management plans; developing and managing community outreach programs for the New England Forestry Foundation; and numerous roles in conservation and education at non-profit organizations such as Shelbourne Farms in Vermont and the New England Aquarium in Boston. Lisa has a Master's degree from University of Michigan's School of Natural Resources and Environment and a Bachelor's degree in Environmental Studies from Oberlin College.