

Organizational Learning and Evaluation

Overview

May 8, 2009





“Greatness, it turns out, is largely a matter of conscious choice, and discipline.”

Issue One: Defining “Great”— Calibrating Success Without Business Metrics

“It doesn’t really matter whether you can quantify your results. What matters is that you rigorously assemble evidence—quantitative or qualitative—to track your progress.”

-Jim Collins, *Good to Great and the Social Sectors*

...and for Effectiveness

Key Skill Number One: The Ability to Manage by Facts

“Without the facts, without the data, it is almost impossible for organizations to be effective.”

-Rosabeth Moss Kanter

Speaking at the 2007 Center for Effective Philanthropy Conference



Reflection Questions: Determining Focus

1. Is the focus at the program or organizational level?
2. Is the work based on a tested model or is this approach an entirely new innovation?
3. Is the purpose:
 - a. to prove a model for dissemination
 - b. to inform course corrections
 - c. for external accountability
 - d. some combination thereof?
4. In what stage of development is the work? Is the work “evaluation ready”?
5. What resources are available?

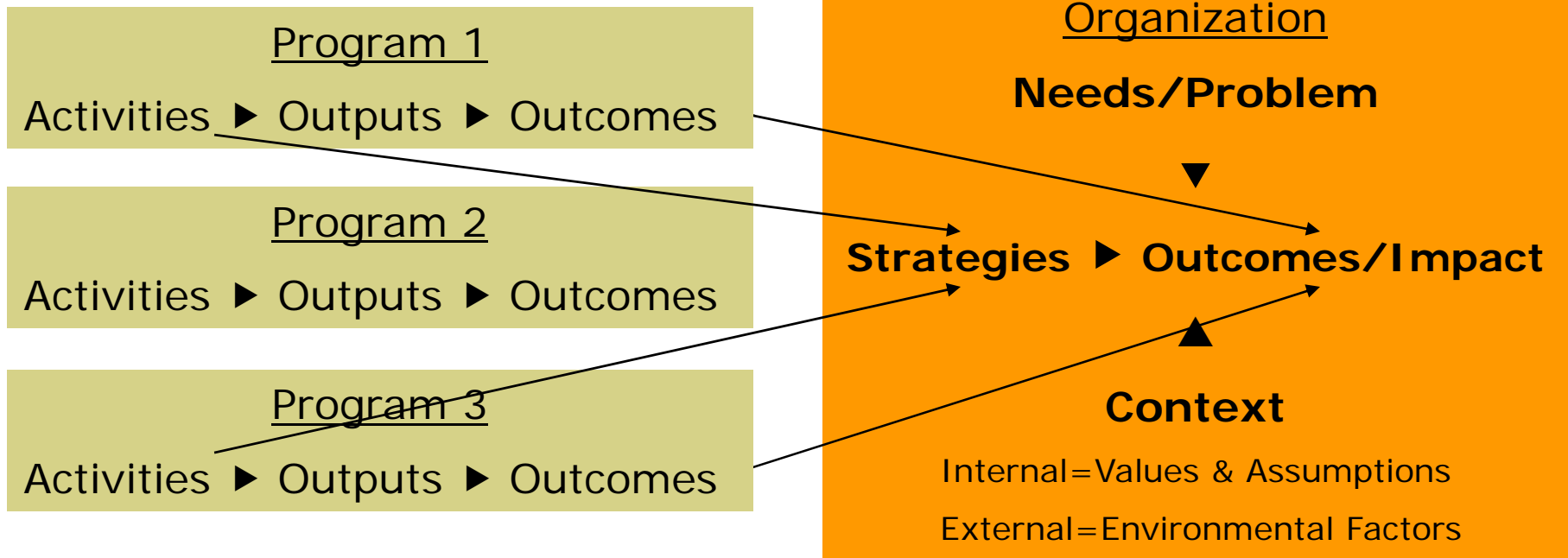
Why Focus on Evaluation Frameworks?

- **Communicates a results-based orientation**
 - Aligns strategies with outcomes to maximize success
- **Makes explicit what we hold and know implicitly**
 - Facilitates assumption-/reality-testing and expectations management
 - Surfaces and identifies steps in the change process
 - Clarifies various target audiences for change
- **Identifies what is within, and outside of, your control**
 - Informs need for partnerships or additional resources
 - Addresses the “attribution” vs. “contribution” issue
- **Starts your organization on the road to becoming the “dog wagging its own tail”**

Logic Models and Theories of Change

Logic Models (Programs, Initiatives)

Theories of Change (Initiatives, Organizations)



Monitoring the Machine: Dashboards

Fund Development

- # of new major gifts
- Total dollars raised
- # of existing grants re-funded
- # of new grants funded

Finances

- Net surplus/deficit compared to budget
- # of months operating reserve
- # of months cash on hand

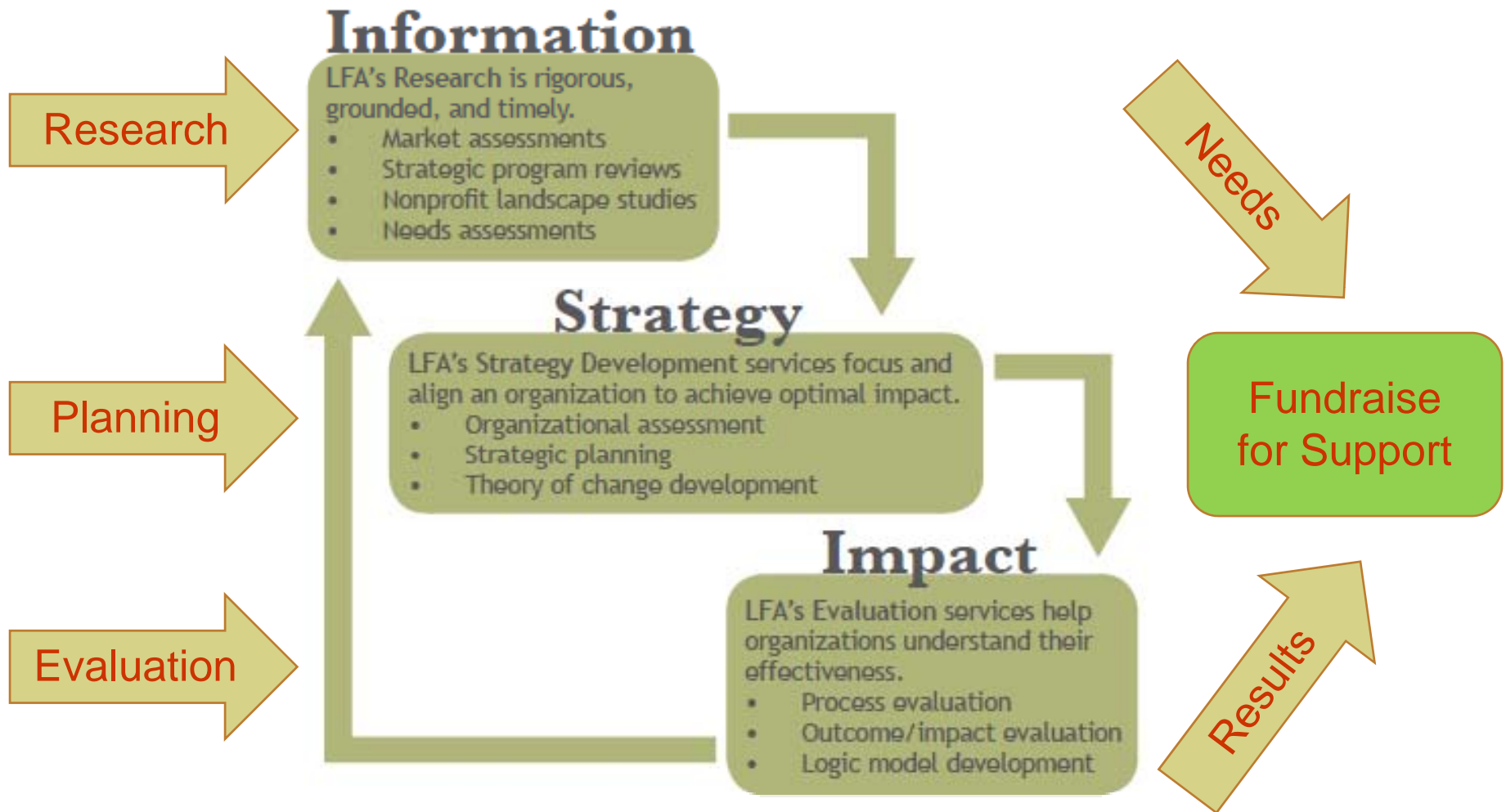
Board Governance

- Focus on strategy and generative issues
- Quorum at board meetings
- Board member participation in giving

Programs

- # of outreach presentations
- # of communities served
- # of successfully completed projects

Evaluation as Part of the System



Recommendations

- Build a culture of inquiry and evaluative learning across the organization, with modeling and tone setting from leadership
- Develop your theory of change and logic model(s)
- Be proactive: communicate about and share your evaluation frameworks (e.g., in grant applications)

Recommendations (cont.)

- Resist and work through common barriers:
 - *It won't be rigorous enough unless it meets the gold standard of research.*
 - *Our work is so unique, there are no measures out there that will work for us.*
 - *We can't afford to focus on anything other than mission work, especially now.*
- Discuss connections among evaluation, strategy, marketing, and fundraising activities
- Prioritize building your organization's evaluation capacity!

Questions?

Thank you!

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