



Oops, I Forgot to Evaluate!

3 easy steps for retrospectively evaluating your funding initiative

It's year five of your five-year funding initiative, and you need to report progress to your board and determine whether another round of funding is warranted. You're thinking, "Darn, I wish I had included evaluation planning when we developed this initiative. Now I'd have a better way to show our results."

Sound familiar? Don't worry; you aren't alone. Many funders don't think about evaluation at the outset (or they do think about it but choose to allocate resources completely on the program, rather than including assessment). There are three things you can do now — retrospectively — to learn from the past and inform your future. I recommend doing this with the help of an external evaluation consultant. He or she will be more objective, will be able to devote the time needed, and will be more likely to elicit honest feedback from grantees and stakeholders at a time when additional funding is at stake.

Fortunately, conducting a retrospective evaluation is as simple as look, listen, and learn.

1. Look at reported accomplishments and compare them to objectives.

Your grantees identified their project goals and objectives in their proposals, and hopefully they reported on their progress in their annual grant reports. You can review these documents to determine which objectives were met (or exceeded) and which weren't. Additionally, your grantees might have highlighted some unintended achieved outcomes that weren't part of the original plan. Those should be documented too, as well as barriers that prevented grantees from meeting all of their goals.

2. Listen to your grantees.

Interview your grantees to learn what they see as major accomplishments, barriers, current needs, and opportunities for further investment. You could include the following questions among others you identify:

- Given your goals (or the goals of the initiative), where were you most successful?
- What do you think were your most important accomplishments during the grant period?
- Were there any additional accomplishments related to this goal that weren't anticipated?
- What were some of the challenges you encountered that made it difficult to meet your goals? (These might be internal challenges such as staff turnover, or external challenges such as changes to the economy or policy environment.)
- What are the most pressing needs you (or the population being served) are facing now?
- If additional funding is available, where should we focus our resources over the next two to three years?
- If we/you could do it all over again, what should we/you do differently? (I call this "the question guaranteed to save your foundation time and money," as it will likely pull out the critical missteps and missed opportunities that can be rectified in the next phase of grantmaking.)



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Oops, I forgot to evaluate, continued

3. Learn from other key stakeholders and experts.

Now is a great time not only to learn about the impact of your current program but also to plan ahead for the next round of investments. The world has changed in the two, five, or ten years since you planned your funding initiative, and so have the needs of your constituents. Local, national, and international experts and thought leaders can help inform you about these changes and opportunities. So can stakeholders who have been involved in your efforts but who weren't grant recipients (e.g., other funders, government officials, schools, parents, consumers, etc.). Learn from them by reviewing recent literature or by conducting interviews, surveys, or focus groups.

Although including a project-wide evaluation plan from the start of your initiative is always the best approach, it's not too late to create some meaningful lessons and metrics when your project is well underway or even winding to a close. Most retrospective evaluations can be conducted and reported within a matter of weeks. (In fact, you could accomplish the first step in a single day!) With the results in hand, you'll be able to better inform your board about the impact your project has had and provide data that will help make sure the next round of funding is money well spent.

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