

Making the Most of Evaluation

How can funders derive more usefulness from evaluations, especially while they are in progress? How can learnings be more effectively gleaned from evaluation to inform funders' grantmaking strategies?

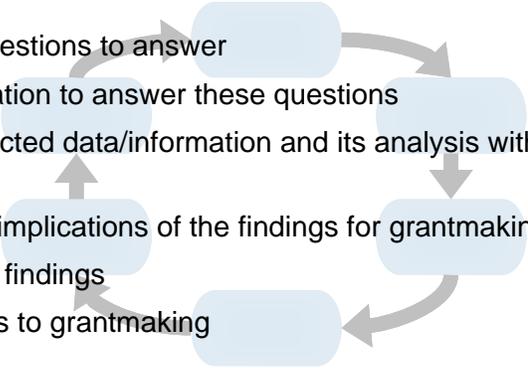
During a multi-year evaluation undertaken for the Community Clinics Initiative (CCI), we observed that CCI was particularly effective in extracting knowledge and lessons from the ongoing evaluation to make their grantmaking more responsive and strategic. CCI was making more real-time adjustments with more success than we typically had seen in other evaluations.

What is the Community Clinics Initiative?

The Community Clinics Initiative (CCI) is a grantmaking program supported jointly by The California Endowment and Tides. CCI began in 1999 with the purpose of building the information technology capacity of California's community clinics and health centers. Over the past eight years, it has grown in scope to support capital projects, leadership trainings, community partnerships and clinical data quality improvements. CCI has distributed over \$60 million in grants to 92% of California's community clinics and clinic networks. These grants along with technical assistance, trainings and convenings have helped to enhance the community clinics' identity as a field, create new capacities within clinics, strengthen the networks between clinics and raise the profile and concerns of clinics in the policy and philanthropy sectors.

Learning from Evaluations

CCI utilizes an evaluation process that follows the sequence of steps depicted below in an ongoing and iterative manner. This evaluation approach is widely accepted and used. However, in many instances, the applications and changed practices that result from evaluation do not meet expectations. We wondered why CCI, using this same set of steps, experienced more than average success.

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- **Identify** key questions to answer
 - **Collect** information to answer these questions
 - **Share** the collected data/information and its analysis with key stakeholders
 - **Reflect** on the implications of the findings for grantmaking
 - **Learn** from the findings
 - **Apply** learnings to grantmaking

Upon reflection and analysis, we identified five tactics that CCI infused into the evaluation process to a greater extent than what we saw in most other evaluations. These tactics ensured that the evaluation process and its findings were real-time learning tools, enabling CCI to effectively adjust its grantmaking while the evaluation was still underway.

The five tactics that enhanced CCI's ability to learn from its evaluation are:

1. **Engaged Collaboration:** CCI staff maintained a high level of engagement with the evaluation team throughout the evaluation process, giving input regarding key evaluation questions, data collection, analysis and the application of findings. Each opportunity for this type of collaboration allowed CCI leaders to reflect on what they already knew as well as what they wanted to know. CCI also included other stakeholders in evaluation processes, such as CCI grantees, technical assistance providers and other co-funding partners. These stakeholders provided additional valuable input into all aspects of the evaluation, from the design to the interpretation of findings.

- 2. Enabling Environment:** CCI used several mechanisms to create forums and spaces conducive to learning, sharing and reflection, including opportunities to test and discuss mid-stream learnings. CCI convened learning communities for grantees, staff and the evaluators; quarterly staff reflection sessions for internal learning; and meetings with other stakeholders to share findings. The learning communities are good examples of how CCI blended real-time learning with the evaluation. These periodic gatherings provided a forum to stimulate the discussion and application of evaluation data collected to date; participants also helped to identify evaluation areas of inquiry that could directly inform their work and determine how relevant questions could be incorporated into the evaluation.
- 3. Added-Value Lens:** In all phases of this process, CCI considered ways that the evaluation data might build on data collected through previous evaluation efforts as well as grantee readiness assessments, letters of intent, proposals and final reports. Regardless of the original evaluation design, as each new phase of the evaluation approached, CCI staff always considered the benefit and costs of collecting specific types of data, the priority status of the questions to answer and the sequencing of evaluation data so that information could be put to near-term use (e.g., to inform a new funding program, launch a subsequent round of request for proposals and/or address current technical assistance needs).
- 4. Right-Sized Agility:** CCI realized that a “one-size-fits-all” approach to evaluation did not work for all its grant programs and evaluation questions; this need for tailored evaluation processes was accentuated by the emergent nature of CCI. This recognition prompted an evaluation plan designed to balance both rigor and flexibility: rigor in the design of the evaluation to ensure systematic collection of data to assess changes over time, and flexibility to incorporate new evaluation questions mid-stream and pursue additional learning opportunities as they arose. Sometimes, CCI chose to abort specific questions if the Initiative emerged in such a way that previous plans and evaluation questions were no longer relevant.
- 5. Full Transparency:** CCI staff modeled full transparency to create an environment where evaluators, staff and stakeholders could comfortably share positive outcomes and challenges, openly and in real time. Quick releases of evaluation data summaries and reports that included reflections on what did not go as well as planned were common. This modeling of transparency aided others involved with CCI, such as grantees and other stakeholders, to openly discuss their own challenges, increasing the likelihood of identifying solutions.

A final ingredient for success was good judgment about how and when to use each tactic, which was informed by CCI staff’s closeness to the Initiative’s grantees and funders with whom they collaborated.

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