



**SEMI-ANNUAL CONFERENCE
SAN FRANCISCO
JANUARY 24-25, 2013**

Who Defines and Evaluates Success? How Funders, Grantees, and Communities Learn Together

**Thursday, January 24, 2013
1:30-3:00pm**

Session Organizers:

- Melissa Extein, Director of Strategic Learning, Research and Evaluation for International Programs, American Jewish World Service (AJWS)
- Christine Reeves, Field Associate, National Committee for Responsive Philanthropy (NCRP)
- Caitlin Stanton, Senior Officer, Learning, Monitoring & Evaluation, Global Fund for Women

Panelists:

- Melissa Extein, AJWS
- Caitlin Stanton, Global Fund for Women
- Christine Reeves, National Committee on Responsive Philanthropy

Sponsors:

- Global Fund for Women
 - American Jewish World Service
-

Melissa Extein discussed how AJWS employs a Monitoring and Evaluation (M&E) model that allows it to monitor and evaluate work on three levels: grantee, country issue, and regional. She explained that AJWS views its M&E efforts on a continuum: Baseline monitoring → Grantmaking strategies → Short-term outcomes → Long-term goals.

AJWS developed a M&E case study around sexual health and rights in Uganda. They responded to the requests of grantees working on LGBTI and sex worker to convene a meeting, and tried to develop an agenda that met both grantee and funder needs. Melissa explained how as grantmakers, AJWS facilitated and listened. At a future grantee convening, AJWS might ask a grantee partner to facilitate, because facilitation is a key point to manage in terms of power dynamics. The grantees in attendance began to see shared goals as a result of the convening. Instead of AJWS asking for quantitative metrics, the meeting emphasized reflection and sharing about how change has occurred. AJWS facilitated a situation analysis of current activism and outcomes, and did a “human statue” exercise which encouraged dialogue around individuals’ position within the movement. At the end, grantees drew pictures of their vision for the future. One poignant picture was entitled: “A future where funders say, we hear you’re doing this work, how can we do it with you?”

AJWS ended the meeting with greater awareness of the status of the movement. A year later, LGBTI and sex worker groups are supporting each more than ever before.

Catlin Stanton began by saying that increasing the constituent voice in funder and grantee planning, evaluation, and decision-making is essential to making comprehensive conclusions about what constitutes success. Success is more subjective and political than we might think, she said.

The Global Fund for Women (GFW) has conducted two experiments on M&E. The first is a project with two long-term GFW grantee partners in southeast Asia. It began with developing learning questions jointly between GFW and grantee partners. External evaluators played the role of coach and facilitator, supporting the process as it developed. GFW found that engaging with each other as peers – funder and grantee – helped to find weaknesses on both ends, identify gaps in data collection, and provide richer information and analysis. Overall, coaching helped GFW to find the confidence to investigate causality of grantee partner outcomes. If it was only the funder doing this analysis, it wouldn't have been as comprehensive and all encompassing.

In the second case study, grantees conducted 40 focus groups and 445 interviews with their constituents, women's farmer groups. The goal was mainly to save money, since having grantees conduct the interviews was less expensive than employing external evaluators. The unintended benefit that arose was that grantees learned a lot from their constituents, who raised some new needs the grantees and funder hadn't been aware of previously. After this valuable process, GFW worked to find ways to continue to support constituent voices within their grantmaking process.

Lastly, Christine Reeves discussed how funders can be responsive to M&E needs. She recounted that there are 74,000 foundations in the United States (granting \$54 billion a year) and 1,800,000 nonprofits, so the need for M&E is great. She talked about how philanthropy can be seen as a continuum between a charity model (in which the "haves" give to the "have nots," based on problems that the "haves" determine) and a social change model (in which all communities work together to solve problems that everyone defines). Organizations following a charity model end up doing "band-aid work," or direct service that perpetuates current systems. On the other hand, organizations following a social change model work to change systems that create problems that then need band-aids. NCRP recently published a report on when funders focus on social change strategies and direct services. It found that when funding is focused on marginalized communities engaged in social change, every \$1 returned \$115. Part of M&E, then, is to make ourselves uncomfortable in healthy ways in order to be more effective grantmakers for social change.

Attendees then broke into small groups to discuss the various case studies the speakers presented. During the wrap up, each group shared questions and comments about the panel. The following points emerged during this segment:

- At the end of the day, funding human rights groups doing amazing work is something to be proud of.
- It is important to use human rights frameworks that initiate and inform our M&E practices.
- How do we know a return on investment is causal, correlated, or incidental?
- What kinds of return on investment strategies exist?
- Return on investment is only one strategy among many different valuable strategies that assess success.