

Rethinking Foundation Practices Around Evaluation

Wednesday, May 16, 2018



THE CENTER
FOR EFFECTIVE
PHILANTHROPY

CEP'S MISSION

To provide data and create insight so philanthropic funders can better define, assess, and improve their effectiveness – and, as a result, their intended impact.



Purpose of Study

We wanted to understand:



**staffing and
structure**



**relationship
with strategy**



**investment
and support**



activities



**usefulness
and use**

Methodology

We surveyed the most senior evaluation or program staff member at U.S. and Canadian independent and community foundations that either:



provide **\$10M or more** in annual giving



are members of the **Evaluation Roundtable**

Respondent Demographics

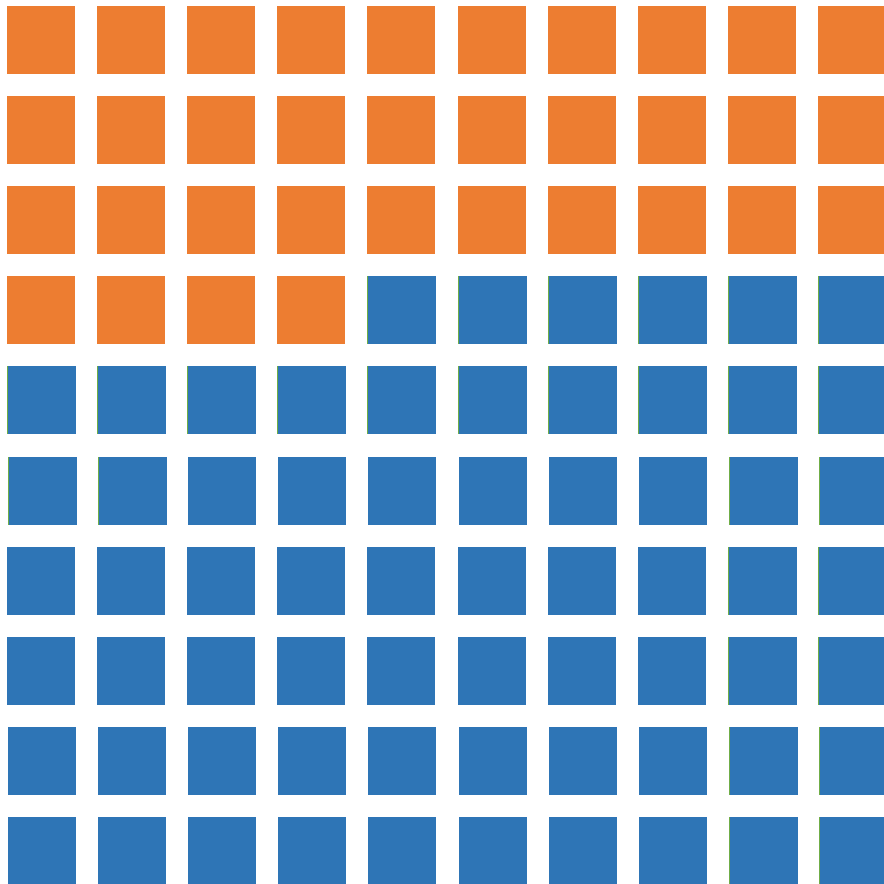
Survey Period	Number of Responses	Survey Response Rate
Sept – Oct 2015	Total: 127	Total: 50%

Respondent Characteristics	Range	Median Value
Assets	\$2M to >\$11B	\$533M
Giving	\$1M to >\$590M	\$28M

Staffing and Structure

How many full-time equivalent (FTE) staff are regularly dedicated to evaluation work?

	Overall Median	< \$20M in giving	\$20M- \$49M in giving	\$50M- \$200M in giving	>\$200M in giving
2015	1.5	1.0	1.0	2.0	4.0



34%

house the evaluation function in its own department.

Of those departments, 79% had their own budget.

If evaluation is not its own department, it most often is embedded in program departments.

In the most recent fiscal year, how much did your foundation spend on evaluation?

Overall Median	< \$20M in giving	\$20M-\$49M in giving	\$50M-\$200M in giving	>\$200M in giving
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2015 **\$200,000** \$100,000 \$80,000 \$500,000 \$5.5M

Only 35% of respondents were quite or extremely confident in the accuracy of their estimate.

Focus of Role

32% say compiling or monitoring metrics to measure foundation performance is a top priority

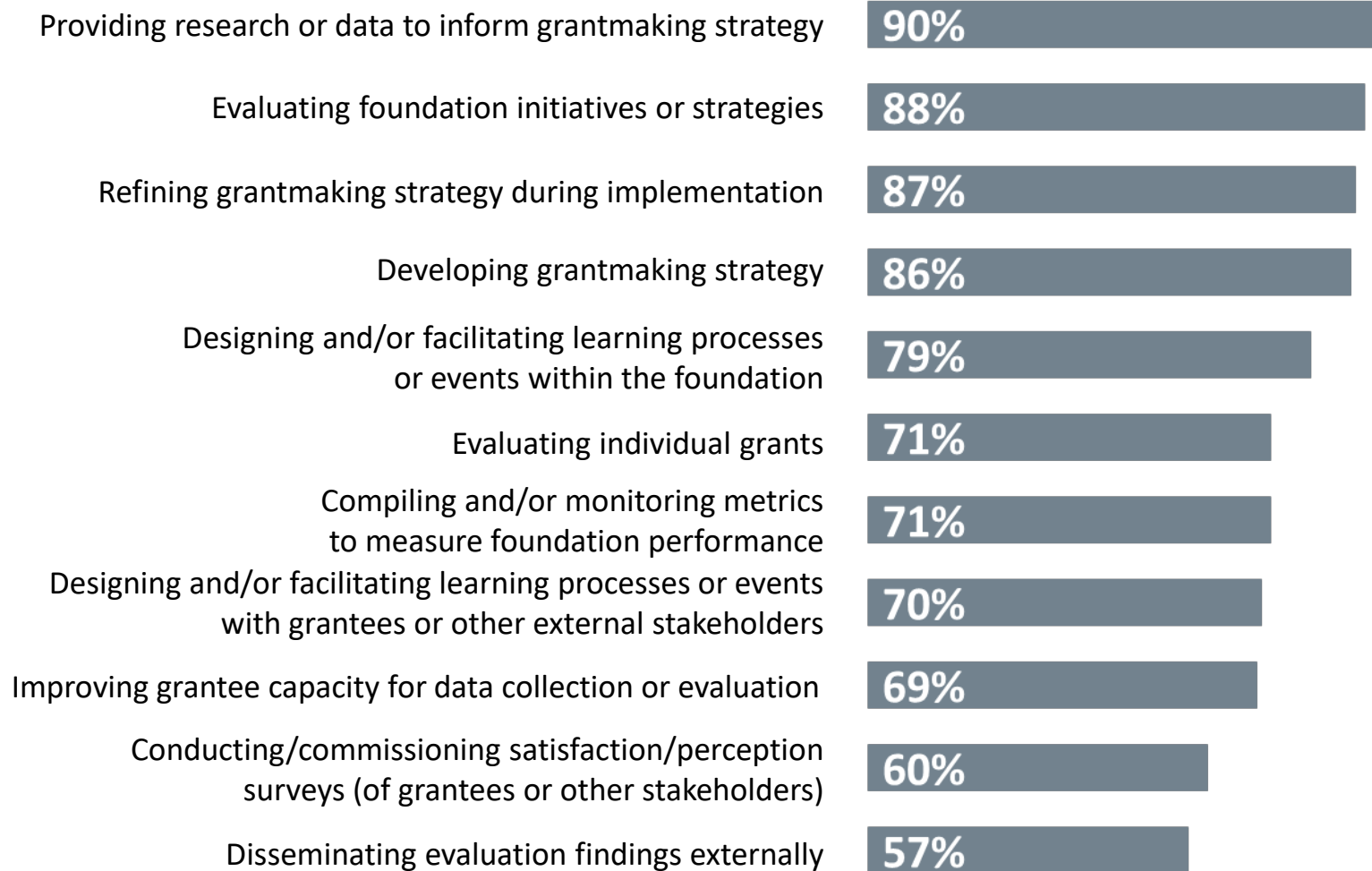
Foundation

Initiatives or Strategies

51% say evaluating foundation initiatives or strategies is a top priority

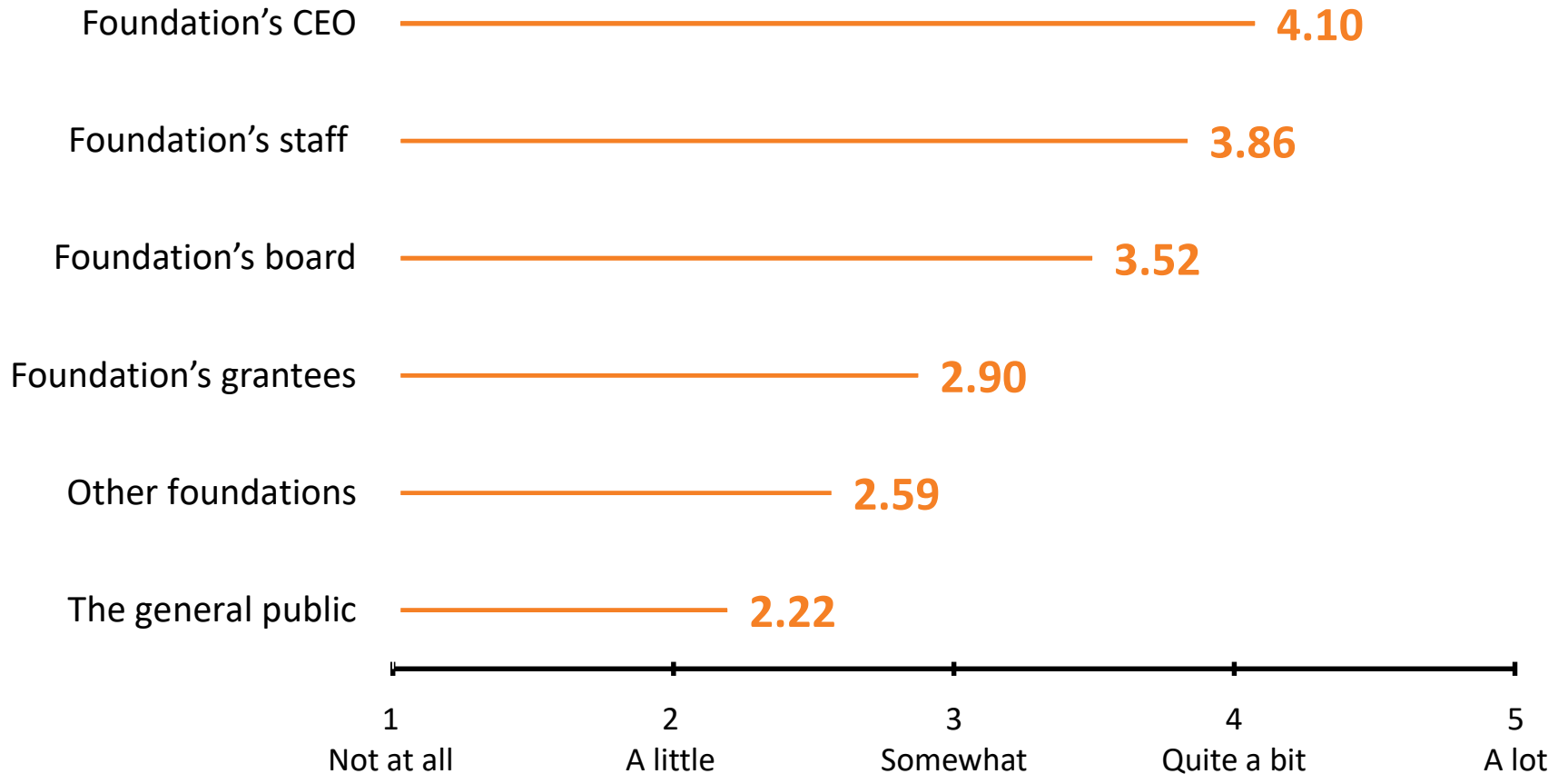
34% say evaluating individual grants is a top priority

Individual Grants



Challenges: The Sharing and Use of Evaluation Information

To what extent are evaluation findings shared with the following audiences?



Percentage of respondents who say the following practices have been at least **somewhat challenging** in their foundation's evaluation efforts

83%

Having evaluations result in useful **lessons for the field**

82%

Having evaluations result in useful **lessons for grantees**

76%

Having evaluations result in meaningful **insights for the foundation**



Thank You.