

# Evaluating and Learning from Rural Community and Economic Development Grantmaking and Program Efforts

Thursday, 4:00-6:00 p.m. Burlington B

## Session Facilitator

- **Mary Virtue**, *Consultant and CSG Lead*

## Peer Leaders

- **Elizabeth Myrick**, *Senior Associate, Aspen Institute Community Strategies Group; former Program Director, Maine Community Foundation*
- **Nelsy Dominguez**, *Program Director, New Mexico Community Foundation (to comment and answer questions only)*

## Session Topic

The focus of this session is how a community foundation – and its grantees – *assess, learn from and improve* the impact of their rural community economic development grantmaking and program efforts.

## Strategic/Implementation Issue Session Flow

The session will flow something like this:

Mary	Intro, Context, Introductions	10 minutes
Mary	Framework for Evaluation and illustrations from NMCF and MCF external evaluations	20 minutes
Mary	<i>Clarifying Questions for Mary</i>	5 minutes
Elizabeth	MCF Approach and Experience	20 minutes
Mary	<i>Clarifying Questions for Elizabeth</i>	5 minutes
Mary	<i>Instant Advice</i>	Remaining time

*Clarifying Questions* for each presenter will relate to their presentations and be asking for clarification or more detail about the framework for evaluation, what each community foundation did and what was learned from it.

*Instant Advice* provides a time for participants to present their own situation related to evaluation and learning. We are aiming for practical rather than theoretical exchanges here. We will suggest that participants ask questions or draw inferences *from experience* – by first taking a minute or two to give us some background/context and then ask for advice or offer an idea for the rest of the group.

## Presentation Outline

Here are the questions we asked Mary and Elizabeth to focus on during their initial *Evaluating and Learning from Rural Community Economic Development and Grantmaking Efforts*.

1. ***Your Program.*** Just for context, briefly tell us about the rural community economic development grantmaking or program effort you will focus on in this presentation. To help your listeners follow your tale, start out by simply answering:

- What was your *catalyst* for starting the rural CED program/grantmaking effort you are focusing on in your story?

Then, *in the order you think your foundation answered them* when designing the program, answer the questions below.

- *Where:* What rural region or set of places did you target with your program/grantmaking effort?
- *For Whom:* What rural people or population did you target with your program/grantmaking effort?
- *What* rural development approach did you support with your program/grantmaking effort?
- *With whom:* What type of grantees did you target?
- *With whom:* What other partners did you work with to help with technical assistance, learning, or project management?
- *With whom:* What other resource partners (funders) did you work with?
- *How long:* For what period of time did you sustain the program?
- *Which and how much resources:* What resources did you commit to this program – staffing, board, operational and grant resources?

2. ***What are the outcomes you were seeking? And how did you determine them?***

Outcomes are the end results that your community foundation is taking responsibility to achieve through this program. An outcome indicates your desired impact – that is, changes in the lives of people, communities or organizations (including your own community foundation). Outcomes are *not* simply your activities or the resources you commit.

Generally, whether you realize it or not, most community foundations program or grantmaking efforts illustrate a “theory of change.” And in most cases, *your foundation’s impact on the rural families and economies is likely to be once-removed – because your grantees or program partners are the ones doing the work on the ground.* Indeed, it’s likely that your grantmaking itself does not have *direct* impact on economic livelihoods of the rural poor. Rather, it is the expected *eventual* outcome of what you fund.

For example, you might be providing grants to strengthen the local non-profits that provide essential services to help low-income workers gain and maintain employment. In evaluation terms, this means your grant outcomes (*stronger non-profits—with more resources, more highly skilled staff, and well-crafted strategies and systems that last and garner more resources*) are very different from your grantees’ outcomes (*servicing more low-income rural*

*people with better employment services that actually help them get and keep jobs over the long-term*). But you do want to learn over time that funding the one will lead to the other (that's your theory of how things will change)!

Thus, in most cases, there are two kinds of outcomes that the CF cares about:

- a. *Community level outcomes*: These are the end results/change/impacts you ultimately seek for rural communities and families that your grantees, partners or program participants will produce. Your grantees/program partners are responsible for producing these (using your funding and other program supports).
- b. *Community foundation-level outcomes*: These are the end results/changes/impacts you seek for your grantees or partners that will enable them to achieve the community level outcomes. This is what your community foundation takes responsibility for producing. You might achieve these outcomes but your grantees or partners might not achieve the community level outcomes; in this case, something may be wrong with your theory of change.

It is also useful to think in terms of outcomes as short-term (one year or less), medium-term (two to four years) or long-term (over five years).

So, tell us, as part of your story:

- ◆ What were one or two realistic ***community-level outcomes*** you wanted your grantees/partners to achieve for rural communities or families?
- ◆ Who determined these – and how?
- ◆ What were one or two realistic ***community foundation-level outcomes*** you wanted achieve for your grantees/partners that would enable them to produce the community-level outcomes for rural communities or families?
- ◆ Who determined these – and how?

### 3. ***How did you and/or your grantees/partners track and measure these outcomes:***

- ◆ What one or two indicators were identified for each outcome?
- ◆ Who determined those indicators – and how?
- ◆ What measures were identified for each indicator?
- ◆ Who determined those measures – and how?
- ◆ What kind of data collection tools did you and/or your grantees/partners use to track the measures?
- ◆ How often was data collected?
- ◆ Who was responsible for this?
- ◆ How were findings reported?

### 4. ***What was your approach to learning – or your learning “practice”?***

- ◆ What methods did the community foundation use to reflect on what happened in this initiative? That is, in what ways and with what help did you look at the relation of the

design of the program (as answered in Question 1) and the progress toward the various outcomes?

- ◆ Who was responsible for seeing that this happened?
- ◆ How were grantees/partners included in the learning and reflection process?
- ◆ How did this learning improve the community foundation's performance or next steps?
- ◆ How did this learning improve the grantees/partners' performance or next steps?

**5. *How did you share this learning?***

- ◆ With the community foundation staff and board?
- ◆ With the grantees?
- ◆ With the wider community?

**6. *The Lessons.*** Please finish up with these lessons.

- ◆ What are the top *three toughest things* your foundation experienced in this evaluation and learning effort?
- ◆ What are the top *three best things* that you learned, and how did they improve your subsequent work?
- ◆ What *three lessons or pieces of advice* would you offer to another community foundation that seeks to learn from and improve its rural community economic development program and grantmaking?

In case it's any help, you'll find attached a chart that might offer a model of how you could organize the information in Questions 2-4 for a simple display.

	Outcomes	Indicators	Measures/Data	Tracking Plan	Reflection Process
Community Level Outcomes	1:	a:	▪		
			▪		
		b:	▪		
			▪		
	2:	a:	▪		
			▪		
		b:	▪		
			▪		
Community Foundation-Level Outcomes	1:	a:	▪		
			▪		
		b:	▪		
			▪		
	2:	a:	▪		
			▪		
		b:	▪		
			▪		