

# Who is Having Success with Learning?

## The Colorado Health Foundation

*Grantmaker refines evaluation model to enhance grantee and organizational accountability, while positioning it to inform and support decision-making.*

### Quick Grantmaker Stats

Type of funder	Health Conversion Foundation
Geography/Issue Area	Colorado/Health
When founded	2006
Total assets (as of FY 2012)	\$2.3 billion
Annual giving (as of FY 2012)	\$88.2 million
Number of staff	60
Website	<a href="http://www.coloradohealth.org">www.coloradohealth.org</a>
Brief description of the program/ practice being discussed	Refined evaluation model that positions evaluation to inform and support decision-making.

### 1. Describe the situation or practice.

The Colorado Health Foundation targets investments in three areas: Healthy Living, Health Care, and Health Coverage. According to Kelci Price, director of research and evaluation for the foundation, the goals of its evaluation efforts are both to gauge the impact of the dollars it invests and to generate learning so the foundation can improve its performance over time.

### 2. What have you tried to do differently?

Price said the Colorado Health Foundation’s approach to evaluation has evolved in recent years to focus more intently on learning about progress and using evaluation to inform organizational decisions.

In 2008, the grantmaker adopted an evaluation model known as Measurable Results. Based on extensive grantee input, the model included a set of 12 measures across the foundation’s three program areas and asked grantees to provide one or two key data points for each grant. The evaluation model was designed to provide meaningful, actionable data without imposing excessive data collection burdens on grantees.

In the years after it adopted Measurable Results, the foundation decided it needed to expand the breadth and depth of its evaluation efforts. While Measurable Results provides a good way to look at individual grants and to ensure accountability, the foundation wanted to be able to assess the degree to which its work was delivering on broader strategic goals.

“We have strategic questions we want to address that are bigger than any one grantee,” Price said.

The foundation expanded its evaluation model in 2013 with these goals in mind. Today, staff teams in each of the foundation’s three core areas focus on achieving certain goals, and have developed specific measures of progress that will help them assess the effectiveness of the work over time. As staff members in each program area identify their strategies and goals, the evaluation team helps them create measurement and learning plans that define major decision points, what they want to know at those points and the methods they will use to generate that knowledge.

For example, under a foundation program aimed at improving the quality of physical education programming in schools, the foundation initiated a cluster evaluation to understand the degree to which students in participating districts were engaging in moderate to vigorous physical activity, as well as the successes and challenges programs were encountering. “This is the type of study we plan to use much more as we move forward in order to understand the outcomes of our investments, and how we can improve our impact in the future,” Price said.

*“Evaluation in philanthropy is of greatest value when it goes beyond collecting information — synthesizing the available evidence and supporting the organization to translate learning into decisions.”*

*— Kelci Price, Director of Research and Evaluation*

### **3. What has been the result?**

The Colorado Health Foundation is rolling out its new evaluation model in 2014, so it’s hard to talk about results yet. However, a recent evaluation of a school-based healthcare initiative revealed the promise of the grantmaker’s new approach.

The evaluation was expressly tailored to identify steps the foundation could take to make school-based healthcare centers more sustainable. “That evaluation had a very specific purpose and it had dissemination points over

several years,” Price said. Among the results was that program staff members were able to use the information coming out of the evaluation to make mid-course changes in the initiative. As an example, when the evaluation showed that school-based health centers rated themselves fairly low on their ability to do marketing and outreach for their services, the foundation initiated a mini-grant program to provide marketing technical assistance to grantees. “The program officer has said that the evaluation component was essential to helping them effectively manage that initiative and to understand its progress,” Price said.

## Gleaning Lessons from Other Foundations

While it was working to strengthen its evaluation approach, the Colorado Health Foundation reached out to a number of other grantmakers with evaluation expertise. Price said this outreach produced several important takeaways about how grantmakers can maximize the power of evaluation for learning. These included:

- ***Be clear about where you are going.*** This means developing clear-cut program strategies tied to theories of change and measurable targets.
- ***Assess progress so you can improve your work in real time.*** Through ongoing evaluation activities that deliver information and data in real time, the foundation can see what’s working (or not) right now, and adjust strategies accordingly.
- ***Be intentional about learning.*** The Colorado Health Foundation has created a structure that supports staff to engage in learning as part of their regular work. By structuring learning around specific decision points, learning becomes more actionable.
- ***Involve grantees.*** The Colorado Health Foundation initiated a deep engagement process so grantees could provide input on the original Measurable Results framework. It is currently weighing how to involve grantees more actively in its newer evaluation methods.

### 4. What are your key insights from doing the work?

How evaluation is positioned in a foundation or any organization is critical, Price said. The executive leadership at the Colorado Health Foundation has elevated the role of evaluation in informing decision-making by providing an independent platform, and embracing the evaluation team’s insights and recommendations, even when they challenge deeply held views in the organization.

While the Colorado Health Foundation is determined to use evaluation to drive learning and improvement, Price noted that evaluation results rarely deliver clear-cut recipes for success. She said, “We need to describe the value of this kind of learning but not overpromise.” At the same time, she noted that grantmakers need to be able to use all available evidence — from research, evaluation and experiential knowledge — to make decisions rapidly. The evaluation team at the Colorado Health Foundation works to synthesize data into actionable information that help guide staff during their decision-making.