

GEO Member Story



How the Wells Fargo Regional Foundation is using evaluation to help grantees grow their impact and to change the way community development funding operates.

Community development presents unique challenges to those organizations funding in this space — grantees must navigate complex procedural and economic environments, as well as manage a large and diverse set of relationships. As Senior Vice President and Evaluation Officer, Lois W. Greco is leading the charge for the Wells Fargo Regional Foundation as it embraces a learning mindset. Now facing a radically changing economic and political climate, the foundation has used learning and evaluation to ensure its grantees are able to weather what comes their way. As Greco put it, “We consider ourselves a learning organization — it’s been in our DNA since our founding.”

The Wells Fargo Regional Foundation has been addressing the needs of low-income neighborhoods in New Jersey, Delaware, and eastern Pennsylvania for nearly a decade. Its programmatic grants are broken down into two categories — neighborhood planning and neighborhood implementation. The former are grants of up to \$100,000 aimed at community development organizations and offer support for the process of establishing a road map for their programs, including hiring consultants and staff to organizing neighborhood outreach and community meetings. Neighborhood implementation grants offer support of up to \$750,000 over five years for program expenses associated with executing a resident-driven neighborhood plan.

To this end, the Wells Fargo Regional Foundation relies heavily on evaluation and learning to drive its grantmaking processes and inform the support it offers. According to Greco, the foundation’s “role really is as a central clearinghouse of learning.” Each quarter, staff members work with their grantees to complete a comprehensive report. From these data points, the foundation can create a comprehensive annual report, which it both shares with grantees as well as uses to turn a strategic eye to its own practices. The foundation’s grantees explained that engaging in this process provides them with, in the words of one grantee, “a regular reflection opportunity.” One grantee reported that this review process provides them with a chance to “explain our plan and progress to community stakeholders.” Another shared how regularly tracking project milestones provides them with an opportunity to engage the community outside of their original implementation plan and, “develop a strategy for leveraging [newly identified] needs to improve our community.”

Using the data from these reports, Greco and her team have identified many trends that have allowed the foundation to refine its grantmaking practices. For instance, because of the nature of community development projects, many of the foundation’s grantees are groups of concerned organizations coordinated by a key-person or organization. By parsing the data, staff identified a worrying pattern of decreasing performance among organizations with turnover in this key-person position. To help combat this issue, the foundation’s grant agreements now include a clause encouraging grantees to meet with the foundation regularly to ensure they have a plan and the capability to stay on track if they lose their coordinating person or organization. As with many organizations offering large-dollar, long-term grants, the foundation also learned that its procedure to wind-down grants leaves some grantees struggling to find alternative funding sources. After

hearing from grantees that they needed specialized support in this period, the foundation took steps to change some of its practices. First, the foundation lengthened many of its neighborhood implementation grants from three to five years. Additionally, the foundation created an opportunity for renewal support. And with those grantees who secured renewal support, the foundation offers an advisor to give budget and technical advice to help put together a fundraising plan that will secure future funding.

The foundation also provides many opportunities for their grantees to learn from each other and the communities they serve. All neighborhood plan and implementation grant recipients complete an in-person resident survey, administered by trained residents of the neighborhood, and make a physical observation of the neighborhood on the parcel level, in order to ensure they have a real understanding of the challenges their community faces.

The foundation also holds an annual conference to create an environment where grantees can establish relationships and learn from each other. “They want to hear from each other, they want to learn from each other,” said Greco. “One of the workshops has been asking six of our more seasoned grantees to create a one-pager on a topic they have demonstrated expertise on, and we’ll do a speed-dating system with them. They’ll present that project for 10 minutes, and then for 20 minutes the roundtable will have a discussion on the topic. Then they’ll switch.”

All new planning and implementation grantees also attend a day long orientation where they meet with other grantees, foundation staff and community development experts. This presents new grantees with an opportunity to learn, using data that has been gathered about their neighborhood, which strategic approach to revitalization may be best for their neighborhood. With several different grantees at the table, individuals are able to learn from their peers throughout the region.

As the Wells Fargo Regional Foundation moves forward, Greco and her team are continuing to look for new opportunities to use learning to inform the foundation’s grantmaking practices, as well as create new opportunities for its grantees to learn from each other. “Neighborhood revitalization work is very lonely work. These are really distressed places,” she said. “Now they’re sharing with each other, building community with each other, and we’re starting to see some replication of practices that they’ve seen in these workshops.”

To find out more information on the Wells Fargo Regional Foundation, please visit <https://www.wellsfargo.com/about/regional-foundation/>.

GEO resources that relate to the topics covered in this member spotlight

Four Essentials of Evaluation



Building Community Capacity for Participation in Evaluation



Evaluating Community Change: A Framework for Grantmakers

