Measuring the Difference We're Making: Making Metrics Work for Grantmakers

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THE GLOBAL FUND FOR Children

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GRANTMAKERS FOR EFFECTIVE ORGANIZATIONS

Overview

Measurement and evaluation issues were the focus of a dialogue held February 25, 2010, in Washington, DC, involving 40 representatives of intermediary grantmakers and some of their funders and other partners. Participants used a case study of an organizational capacity monitoring initiative undertaken by The Global Fund for Children (GFC) as the springboard for a broader discussion of how to evaluate the work of intermediary grantmakers and their grantee partners around the world.

Agreement surfaced on three key facets of effective evaluation for grantmakers, as follows:

1) Focusing on What's Most Important: Grantmaker Impact in Strengthening Nonprofits. Participants discussed the crucial role of intermediary grantmakers in strengthening community nonprofits through funding and other forms of support. A priority for evaluation should be to develop ways to show that grantees are gaining in strength and sustainability, and to link those gains to specific forms of grantmaker support.

2) Quantitative Measures Aren't Enough: "No Numbers Without Stories." While recognizing the value of a capacity-building metric to demonstrate the strengthening role of the intermediary, many participants in the Washington meeting noted a desire to go into more depth in other important areas of measurement through case studies and other forms of qualitative reporting. GFC's Victoria Dunning summarized GFC's philosophy when it comes to assessment as, "No numbers without stories, no stories without numbers."

> **Three key facets of effective evaluation for grantmakers:**
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> **1) Focusing on What's Most Important: Grantmaker Impact in Strengthening Nonprofits**
>
> **2) Quantitative Measures Aren't Enough: "No Numbers Without Stories"**
>
> **3) Beyond Power Politics: Evaluation as a Tool for Learning and Improvement**

3) Beyond Power Politics: Evaluation as a Tool for Learning and Improvement. There was agreement that grantmakers need to make every effort to ensure that assessments such as the GFC's Organizational Capacity Index tool are designed to help rather than punish organizations — and that grantees understand the tools' potential as platforms for learning and improvement.

Participants also identified a range of other lessons connected to the GFC example, and discussed several questions for the field as intermediary grantmakers who are considering or undertaking this work. Looking ahead, they envisioned creating a community of practice to provide ongoing support for grantmakers engaged in measuring the difference they're making. A complete meeting summary is included in the following pages.

Introduction

How can intermediary grantmakers know they are having an impact? How can they track the results of relatively small grants to community-based organizations over time? What are the right metrics for assessing grantee results?

These were among the questions at the heart of a dialogue, held February 25, 2010, in Washington, DC, that was convened by The Global Fund for Children (GFC), facilitated by Grantmakers for Effective Organizations (GEO), and sponsored by Johnson & Johnson (J&J). Other participants included more than 40 representatives of intermediary grantmaking organizations (such as Global Fund for Women, The Fund for Global Human Rights, and American Jewish World Service), along with some of their funders and other partners. A full participant list is attached as Appendix 2.

The stated goals of the full-day meeting were to provide participants with the following:

- An understanding of the common challenges grantmakers face as they implement metrics.
- A shared understanding of promising practices — what are participants doing that's working and how can it be adapted to apply to each of their organizations?
- Alignment around core components of successful metrics that apply to grantmakers' global and intermediary contexts.
- Initial formation of a "community of practice" that participants can build on to reinforce each other's efforts to achieve metrics that are practical and of high quality.

In opening comments to the group, GFC founder and president Maya Ajmera noted that her organization developed a deeper interest in the issue of measurement around the time that its annual grantmaking surpassed $1 million per year.

"We reached that level [of grantmaking] and we began to ask ourselves, 'So what? So what if we are giving all this money away? How do we know if we are making an impact?" Ajmera said. She recounted for the group how these questions prompted GFC to develop a set of metrics to evaluate its work, and she said she welcomed the opportunity to share GFC's experiences and challenges with colleagues in the field.

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Anu Gupta, director of corporate contributions for Johnson & Johnson, praised the "amazing work" that participants in the meeting were doing to improve healthcare and education, protect and advance human rights, and achieve other gains for communities around the world.

"What unites us today is our interest in demonstrating that we are making a difference for these communities, and in learning more about how to drive change and innovation on the ground," she said.

Summary of Participant Challenges

In a survey distributed before the meeting, participants were asked about their organizations' current work in the area of metrics and evaluation. They also were asked about the challenges they encounter in this work. The responses confirmed that many intermediary grantmakers are wrestling with similar issues and problems as they seek to measure the difference they're making.

GEO and GFC organized the key participant challenges into the following four groups:

- *Program/portfolio/systems change challenges* — e.g., developing monitoring and evaluation frameworks for each program area; measuring advocacy activities and the related outcomes; and capturing the value of things that might be causing change but that may not be reflected in standard evaluation tools, such as personnel dynamics and the persuasive power of individual advocates.

- *Integrated metrics challenges* — e.g., coming up with common indicators that grantee partners can use to evaluate their work; developing a metrics system to capture results at various levels, including local, regional, and institutional; and trying to measure social change as a result of a large number of small grants.

- *Grantmaker performance measurement challenges* — e.g., developing metrics that provide a bigger-picture understanding of the grantmaker's overall impact across program areas and grantees.

- *Grantee capacity challenges* — e.g., developing measurement systems that do not place an undue burden on grantee partners; helping grantees develop a stronger understanding of the importance of measurement as a performance enhancement tool; and developing technical assistance models to build the monitoring and evaluation capacity of grantees.

The meeting's facilitator, Courtney Bourns, director of programs with GEO, noted that GEO's work on evaluation in philanthropy has found many of these same challenges among grantmakers of all stripes. "It appears that we are all asking many of the same questions about how to measure the impact of our work, and coming together in forums like this is an important way to share ideas and what we're learning," Bourns said.

Why Evaluation Matters: Johnson & Johnson's Perspective

At Johnson & Johnson, our philanthropic mission is to make life-changing, long-term differences in human health by targeting the world's major health-related issues. Strong partnerships with community groups are critical to fulfilling this mission, as local organizations have the greatest insight into the needs of their people and the strategies that stand the greatest chances of success.

We strive to be strategic thought partners with the organizations with which we work, bringing our core strengths in strategic planning, innovation and evaluation to their life-changing work. With a focus on metrics and evaluation, we work with partners to measure results and to make adjustments that achieve intended outcomes.

We believe that measurement is both a process and a mindset of improvement. Internally, integrating evaluation practice into all facets of our global philanthropic work enables sharing of curricula, methodologies, and measurement tools across programs and regions. Externally, strengthening our partners' ability to capture and communicate impact will hopefully sustain their programs and position them to attract increased external resources. Beyond our funding relationships with community partners, we hope to build our partners' capacity around the strategic use of measurement in all of their work.

To learn more about our work, please visit us at www.jnj.com/ourgiving.

A Case Study—GFC's Organizational Capacity Index

GFC's theory of change rests on the belief that the best way to reach and improve the lives of vulnerable children is through the work of community-based organizations. The GFC model is to identify emerging and promising organizations and to support them so they can deliver effective programs and services. GFC provides a combination of grants and value-added services, including support from organizational development consultants in the grantee partner's region.

GFC has developed a set of metrics capturing the results of its work in three impact areas: capacity building, grantmaking effectiveness, and program effectiveness. GFC vice president for programs, Victoria Dunning, focused her remarks at the Washington meeting on the organization's efforts to measure capacity building. More specifically, she described GFC's experience developing and implementing a tool to measure organizational capacity as part of a broader system of performance metrics.

GFC developed the Organizational Capacity Index (OCI) in 2007–2008, in collaboration with Julie Solomon of J. Solomon Consulting and Jeff Jackson of The Vallarta Institute, who both participated in the Washington meeting.

The OCI measures organizational capacity in eight areas:

1. Planning
2. Fundraising
3. Governance
4. Human resource development
5. Financial management
6. Monitoring, learning, and evaluation
7. Community and external relations
8. Information technology

In each of these areas, the tool assesses the organization's stage of development as one of five categories: nascent, emerging, developing, strengthening, or thriving.

The tool includes a checklist for grantee partners to fill out on an annual basis to help them identify their capacity level across the eight areas. For example, an organization

could be judged as having nascent capacity for governance since it checked one or more of the following items:

- We have plans to officially register our organization, but we are not officially registered.
- We do not have a governing group (e.g., board of directors).
- We have a governing group, but it does not meet regularly.
- We have a governing group, but it is not very engaged in the operation/strategy of our organization.
- The organization's founder makes all decisions regarding finances, strategy, and direction.

In contrast, an organization with thriving capacity for governance might check one or more of the following:

- The governing group has recruited a new executive director at least once.
- The governing group is diversified; members represent a variety of professional sectors and the community served, and they bring a wide range of relevant and useful skill sets and assets.
- Other organizations' governing groups see our governing group as a model.

GFC has refined the OCI tool and is currently using what Dunning called "version 2.0." She said that despite some of the challenges described in this report, the tool has proved "enormously valuable" for GFC and its grantee partners. "It is simple and provides a rapid and shared basis for dialogue with grantees while allowing us to make the case for our strengthening work as an intermediary grantmaker," she said.

Dunning cited examples of situations in which organizations' OCI scores improved in response to specific organizational development inputs — for example, the governance score of an organization in Africa increased after GFC worked with the grantee to strengthen its board. Looking ahead, Dunning said GFC is interested in continuing to refine the OCI without changing it so much that an organization's earlier scores become invalid.

Assessing the GFC Model: Key Issues

In a question-and-answer session with GFC's Victoria Dunning and in small-group discussions, participants in the Washington meeting reacted to the GFC model and identified key issues and questions it raised for them.

Three cross-cutting topics that emerged in the course of these conversations were (1) the importance of evaluating grantmakers' roles in strengthening nonprofit organizations; (2) the need to supplement quantitative measures with stories and other qualitative information; and (3) the use of evaluation as a learning tool for grantmakers and grantees alike, rather than as a means of penalizing nonprofits for deficiencies in performance.

1) Focusing on What's Most Important: Grantmaker Impact in Strengthening Nonprofits

Anu Gupta noted that the role of intermediaries is to do more than "find and fund" organizations. Intermediaries also need to set out to strengthen those organizations so they can become more effective in their work.

Gupta said that strengthening can mean a range of things, from building networks of groups working on related issues to leveraging additional funds for these groups to providing technical assistance and more. The measurement challenge for intermediaries, therefore, is to develop ways of showing that they are building stronger, more effective organizations, Gupta concluded.

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The OCI tool represents one approach to doing exactly that. According to Victoria Dunning, the tool had its origins in GFC's interest in fostering a better understanding of the impact of intermediary and "small grants" funders on the capacity of nascent and emerging nonprofit organizations.

"Some intermediary funders have been doing this work for more than 20 years, and we have seen the field grow, and yet we still struggle to explain the value of this grantmaking model in terms of strengthening organizations so they can get better results on the ground," Dunning told the group.

Dunning used the analogy of a car to describe the importance of strengthening organizational capacity for emerging nonprofits. She said it's common in philanthropy to want to fund programs and services alone. "But that is just gas," she said. She noted that organizations, like cars, need more than just gas to keep running strong. They need maintenance, repairs, and service — activities that can strengthen a car so that it continues to provide reliable transportation for years to come.

GFC's goal in developing the OCI tool was to identify what makes an organization strong — i.e., what types of capacity underlie effective programs and services — and to assess how GFC's work was contributing (or not) to the development of those capacities.

GFC embarked on its efforts with an understanding that significant work had already been done to identify the general components of organizational capacity — from strong fundraising and effective board governance to solid information technology systems. As a result, the organization worked with its consultants to build on existing research and expertise by identifying eight key capacity areas, from planning and fundraising to information technology.

"With small grants and a supportive partnership with GFC, the idea is that these groups will continue to provide existing services while developing along the continuum and becoming ready for larger institutional funding," Dunning said.

The OCI, then, provides the means for tracking the organization's "strengthening" over time. And it is used in concert with GFC's program effectiveness measures to provide a detailed snapshot of a grantee partner's impact and progress.

2) Quantitative Measures Aren't Enough: "No Numbers without Stories"

While recognizing the value of a capacity-building metric to demonstrate the strengthening role of the intermediary, many participants in the Washington meeting noted a desire to go into more depth in other important areas of measurement through case studies and other forms of qualitative reporting.

For example, several questions from the group focused on the fact that organizations sometimes are working on issues and in areas where progress may be difficult to assess. Returning to the car analogy, one member of the group suggested that road maintenance is as important as car maintenance, and that small nonprofit organizations often have little control over their external environments. Therefore, measurement tools should provide grantee partners with the capability to report on situations and events in their communities and fields that affect their ability to succeed.

> Dunning stated that the OCI provides a place for program officers to explain anomalies or challenges facing a grantee. In a comment that participants in the meeting came back to again and again throughout the day, she summarized GFC's philosophy when it comes to assessment as, "No numbers without stories, no stories without numbers."

Dunning stated that the OCI provides a place for program officers to explain anomalies or challenges facing a grantee. In a comment that participants in the meeting came back to again and again throughout the day, she summarized GFC's philosophy when it comes to assessment as, "No numbers without stories, no stories without numbers." In addition, Dunning and the GFC staff emphasized that program officers are in regular dialogue with grantees to identify issues that may be getting in the way of their development and growth.

Zanele Sibanda Knight, director of programs with the Firelight Foundation, noted that her organization had been wrestling with the same need to reflect external conditions in its assessment of grantee partners' development. Now, in addition to capturing information about organizational development, the grantmaker asks grantees a set of questions aimed at generating information about how they approach their work (see Appendix 1 for more).

"Is the organization working in a way that empowers the community, or is it promoting dependency? Are there deep and strong relationships with other actors, including government and other NGOs? In asking these kinds of questions, we get a better sense of positive organizational attributes that are not all about growth," said Knight.

Another model discussed by the group was the Making the Case tool developed by the Women's Funding Network and used at one time by Mama Cash – Fund for Women in Amsterdam. As described in the 2010

GEO/Council on Foundations publication *Evaluation in Philanthropy: Perspectives from the Field*, Making the Case eschews numerical measures of impact by documenting shifts in behavior, engagement, and policy that are connected to grantees' work (see Appendix 1 for more).

Many participants expressed agreement about the importance of adding depth to tools like the OCI through everything from program officer commentaries and third-party insights to site visits. "Reality is messy," said one participant. "Organizations can have multiple characteristics at the same time, and if a community is under duress, a lot of the information can be very fluid, so it's important to be able to dig deeper."

> "Is the organization working in a way that empowers the community, or is it promoting dependency? Are there deep and strong relationships with other actors, including government and other NGOs? In asking these kinds of questions, we get a better sense of positive organizational attributes that are not all about growth," said Zanele Sibanda Knight, director of programs with the Firelight Foundation.

3) Beyond Power Politics: Evaluation as a Tool for Learning and Improvement

Another issue that came up in the group's conversations was how to ensure that grantees do not view efforts such as the OCI as punitive evaluation tools.

Anasuya Sengupta, regional program director with the Global Fund for Women, said there will always be a certain level of discomfort when it comes to assessing grantee results. "We need to bring the power dynamic into the room and understand that however we frame it, this may still be seen as something that will influence the degree to which they will continue to get our support," she said.

There was agreement that grantmakers need to make every effort to ensure that assessments such as the OCI are designed to help rather than punish organizations — and that grantees understand the tools' potential as platforms for learning and improvement.

GFC program officer Solome Lemma said her organization has had to work with grantee partners to help them see that the OCI was not strictly an evaluation tool but a diagnostic to show how they are faring right now in core capacity areas, and to help them identify pathways to further development and growth. "We try to explain that this is a tool to help you understand your organization, and that it's merely one of many ways to capture your work and impact," Solome said.

But Michael Rhein, director of programs with the National AIDS Fund, said that even framing the OCI as a diagnostic tool isn't quite right. Reporting on one of the small-group discussions that followed Dunning's presentation, he said the group viewed the OCI as "more of a learning tool." He said his small group saw enormous potential for fostering a stronger partnership between grantmakers and grantees to the extent that they work together to identify indicators and refine these types of tools in a collaborative way.
As a means for self-assessment (vs. an external assessment), the OCI and similar tools are wholly dependent on grantee partners taking an honest, unvarnished look at their capacity. GFC program officer Hoa Duong said that GFC staff therefore tend to look for aberrations in the results — i.e., scores that don't line up with the staff's own observations and experience — and to engage in dialogue with organizations to try to generate real reflection and learning.

Duong noted that GFC's grantee partners have a "desire to please" and as such may assess themselves at the level they want the funder to see. She cited cases in which GFC staff notice that groups are raising their scores a notch every year. While it is not always possible to engage with every organization about every score that might raise questions, Duong said that she and her GFC colleagues make an effort to initiate a dialogue with grantee partners about their results whenever possible.

GFC's grantee partners have used the tool in a variety of ways, according to Duong. While many organizations have just one or two people complete the tool, some have made it a more participatory process. One grantee in the Philippines, for example, convened all staff to review the tool, which in turn became the spark for a discussion of capacity issues across the organization. While the director of this particular grantee partner found the tool to be useful, he also explained that it took his team three days to fill it out with confidence. In addition, he had to translate it into two local languages in order to engage a critical mass of staff and beneficiaries.

Duong said GFC does not require grantees to adopt specific practices for completing the tool, but that the grantmaking team does encourage them to engage staff and board in the process. And, while GFC staff often work with grantees to complete the tool the first time they do it, the expectation is that they should be able to do it on their own after that.

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Andrea Lynch, a program officer with EMpower, raised an additional consideration for grantmakers as they weigh the power dynamic between them and their grantees. For grantmakers providing relatively small grants to their grantee partners, it can be hard to "claim effect" on an organization's overall capacity. This is especially true when a grantmaker's funding goes to a specific program or project and not to the organization's overall operations. Grantmakers therefore need to stay humble about their contribution to the organization's capacity, and not expect to see significant gains in capacity from a relatively small investment.

Additional Insights for Intermediary Grantmakers

In their small-group and plenary discussions of the OCI case study and the issues it raised, participants touched on a range of other challenges and considerations for grantmakers seeking to measure the difference they're making.

Watch the jargon

Just explaining tools such as the OCI to community-based organizations can be a challenge in many cases. Dunning listed "too much jargon" as one of the paramount challenges in GFC's early work with the tool. "It was hard to define or explain to many of these groups," she said. As a result, GFC staff have been working to simplify the language they use to talk about the tool.

Seek to bridge cultural and linguistic divides

For organizations working globally, there is the added challenge of navigating language differences while trying to apply common metrics across grantees and programs. Although GFC translated the OCI into several languages, the grantmaker still encountered pitfalls related to translation. For example, Duong said that translating the tool for Chinese and Russian users was helpful, but that didn't help in Cambodia or Thailand or in other countries where the OCI has not been translated into the native language. What's more, the concepts at the heart of the tool are not universally understood across Duong's territory, so in some cases it can be a challenge to explain the tool's objectives. For example, she said, "organizational development" can mean different things in different countries, and "capacity building," when translated into Chinese, can be hard for lay people to understand.

Identify the best domains

Which domains matter most in evaluating organizational capacity? One of the small groups that convened after Dunning's presentation identified planning as a core competency, followed in importance by that of monitoring, learning, and evaluation; and that of governance. Another group agreed that planning and measurement were key but added external relations to its top-three list. Yet another highlighted the importance of considering other measures such as how the organization approaches its work. As one participant put it: "Is there a team element to the work? Are people still driving the mission as a collective or interpreting the mission in different ways?" Different grantmakers will have different ideas about what's most important. The key is to come to agreement on the key areas you want to look at so that your evaluation is manageable and delivers results you can use.

Be inclusive

Many participants emphasized the importance of using inclusive processes to identify and develop performance metrics for grantees. Viewed in this way, deciding on indicators can itself become a capacity-building process as an organization's staff and board come together, with or without the assistance of a grantmaker, to assess how they will know they are making progress toward their goals.

Don't forget about your own capacity

Grantmaker capacity for doing measurement work was a recurring theme in the day's discussions. Program officers may need to develop and hone new skills in order to work with grantees on assessment and evaluation. Grantmakers should therefore pay attention to the need for training key staff. At the same time, one of the

small groups at the meeting discussed the importance of reaching out to others who may have capacities that a grantmaker does not. "We do not need to make ourselves do things we don't know how to do," said a participant.

Think in the aggregate

Much of the day's discussion focused on assessing the work of individual grantees, but the group also talked about how to aggregate individual grantee reports into useful assessments of a grantmaker's overall performance and impact. Representatives of the Firelight Foundation and the Global Fund for Women both described their systems for reporting to their boards on the aggregate impact of their organizations' work over a defined period of time.

Look at what you leverage

A key consideration in reporting on the impact of intermediary grantmakers, some participants said, is to look at funds leveraged as a result of your organization's grants. Dunning noted that GFC had produced a report showing the amount of funds its grants had leveraged for grantee partners. The idea is to show the value added by a grantmaker's work as it supports an organization to find additional sources of ongoing funding.

Connect capacity and other measures

As described above, GFC's OCI tool is combined with other assessments to generate a fairly comprehensive picture of grantmaker and grantee impact and progress. In other words, measuring the difference you're making is about more than capacity alone.

Acknowledge that this can be hard work

Dunning said that the first run of the OCI was overwhelming for GFC's program officers and grantee partners alike. However, now that the staff has been able to explain it to all current grantees and they have completed the tool at least once, the dialogue is getting easier, Dunning said. The priority among staff now is to orient new grantees to the tool, with new grantees constituting 15 to 20 percent of all GFC grantees each year.

Challenges and Considerations for Grantmakers Seeking to Measure the Difference They're Making

Watch the jargon

Seek to bridge cultural divides

Identify the best domains

Be inclusive

Don't forget about your own capacity

Think in the aggregate

Look at what you leverage

Connect capacity and other measures

Acknowledge that this can be hard work

Questions for the Field

Toward the end of the day, participants in the Washington meeting explored bigger questions about how grantmakers, both individually and as a field, can best tap the power of evaluation and metrics to enhance their work and the work of their grantees. Participants organized themselves into small groups to address several "burning questions" identified by the full group.

The following five questions generated a high level of interest and discussion in the small-group conversations:

How do we assess the capacity and effectiveness of social movements?

Many participants were interested in the question of "scaling up" measurement activities so that grantmakers and others can develop a better sense of the capacity of networks and movements. In one small-group discussion, participants explored what to look for in assessing the capacity of a movement or network. The following were among the questions they said could guide these assessments:

- Is the movement driven from the bottom up?
- Is it sustainable?
- Are members of the movement talking to each other?
- Do they show an interest in using diverse strategies to achieve their goals?

Courtney Bourns noted that GEO has convened a community of practice for funders interested in funding networks; she said measuring capacity is an important focus of the group's work. Another participant advised the group to use the Monitor Institute's seven-indicator diagnostic for what constitutes a healthy network (see Appendix 1 for more).

How do we develop metrics that can be applied across diverse programs and grantees?

Several participants noted that they fund diverse groups of organizations, often in numerous different program areas. Their question was how to develop a common set of metrics that can provide a unified sense of grantee capacity and outcomes.

Solange Baptiste, program director with the HIV Collaborative Fund, described how her organization developed a list of seven common indicators that guide reporting for all grantees. Another option is to develop menus of outcome indicators and allow grantees to select those most relevant to them. However, some noted an obvious drawback to this type of system: as the number of possible indicators grows, and as different grantees select different ones, it can take some time for grantmakers to have enough data to show impact in one area. "We want to develop a coherent picture of how we are moving the needle on these issues, and that's hard," said one participant.

How do we manage people's expectations around measurement?

One of the small groups convened during the afternoon billed itself as a "therapy session" for those wrestling with the expectations tied to measurement. Participants noted that many board members and funders view

measurement as a way to demonstrate return on investment. And so the question becomes "How can grantmakers deliver enough ROI information to keep people happy while still using measurement primarily as a learning tool?"

Participants' answers to this question centered on clarifying people's expectations around measurement. GFC's Solome Lemma, for example, noted that using the OCI with grantee partners can lead to expectations that GFC will be able to support their capacity-building work in a particular area in which they are identified as needing help. However, this is not always possible due to limited resources and time. The challenge, Lemma said, is to manage these expectations, which can create more demands on program staff's time and workloads.

The key to managing expectations, some participants observed, is for grantmakers to emphasize how measurement can help them and their grantees come to more clarity on the problems they want to solve, and on whether they are using the right strategies to achieve their goals.

How do we develop more robust diagnostics?

Participants in the meeting were in general agreement that the OCI tool provides a helpful frame for entering into conversation with grantees about capacity issues and for capturing where they stand in key areas. But some expressed an interest in developing more robust methods of assessing capacity and organizational development — for example, by going deeper into one or two capacity areas. The Packard Foundation's work in the area of organizational development was cited as a model for this type of approach.

Others returned to Dunning's comment about "no numbers without stories, no stories without numbers" to suggest that grantmakers need to help people understand the limitations of hard data and the importance of coupling it with qualitative information about the work being done.

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How do we strike a balance between pleasing donors and pleasing the community?

Representatives of donor organizations gathered in a small group to develop some guidance for other participants on what funders are interested in when it comes to measuring impact. Speaking for the group was Anu Gupta, who noted that funders such as Johnson & Johnson see themselves as champions of the intermediary organizations represented at the meeting.

With the growth of the Internet and ease of travel, Gupta noted that it is easier than ever to find good organizations doing important work at the community level. Gupta reiterated the point that intermediaries should focus on the value-added aspect of their work in strengthening the nonprofit organizations they support so they can deliver good results for their communities over the long haul.

Conclusion: A Lively and Provocative Discussion

The Washington meeting ended with participants expressing interest in creating an ongoing community of practice around the issues discussed. Closing comments and evaluations revealed that people found the meeting useful, but they saw it as just the beginning of an important dialogue among intermediary grantmakers and their supporters.

Many participants identified a need for deeper conversations about these issues, additional case studies, more information on evaluation practices in the field, and other ongoing activities. GEO and GFC envision continuing this work with the support of Johnson & Johnson, and they will be following up with participants and others in the weeks and months ahead.

Appendix 1: Additional Resources

The following resources were mentioned by participants in the Washington meeting and provide additional insights and tools for intermediary grantmakers and others who are interested in issues of measurement and evaluation in philanthropy.

Firelight Foundation – Building a Fire and the Organizational Development Tool
Firelight has developed a tool to measure CBO capacity along six dimensions (community linkages, holism/breadth of approach, adaptive capacity, organizational identity, sound management, and relations with stakeholders). More information: www.firelightfoundation.org/organizational-learning.php

The Global Fund for Children's Organizational Capacity Index (OCI)
GFC's tool assesses an organization's stage of development according to five categories: nascent, emerging, developing, strengthening, and thriving. More information: please contact The Global Fund for Children.

The Global Fund for Children's Leveraging Report
To understand and track its role and value as a grantmaker, The Global Fund for Children has developed a database system and report feature to show its new, additional, and direct support in increasing a grantee partner's organizational funds and visibility. Types of tracking include: primary grantmaker action, resource type, leveraging source, and leveraging amount or in-kind value. More information: please contact The Global Fund for Children.

Alliance, "Making Metrics Work for Small Grantmakers"
This article discusses GFC's experiences in attempting to measure the impact of small grants. More information: www.globalfundforchildren.org/index.php/Who-we-are/Making-Metrics-Work-for-Small-Grantmakers.html

Grantmakers for Effective Organizations – *Evaluation in Philanthropy: Perspectives from the Field*
This publication offers a review of how grantmakers are looking at evaluation as a means of learning and improvement and offers case studies of evaluation activities undertaken by a range of foundations. More information: www.geofunders.org

Monitor Institute
This website and blog provide practitioners in the social sector with "a filter for the events that are pushing the field towards a more networked form of work and a perspective on how and why those events are unfolding." The Monitor Institute's Network Tool (www.workingwikily.net/network_diagnostic.pdf) is "intended to help network weavers, network participants, and grantmakers reflect upon the health of their networks against eight commonly cited areas of network health." More information: www.workingwikily.net

Women's Funding Network – Making the Case
This evaluation model captures social change results by assessing behavioral shifts and other changes resulting from grantmaker investments. More information: www.womensfundingnetwork.org/the-network/member-services/about-making-the-case

International Treatment Preparedness Coalition HIV Collaborative Fund Grantee Indicator Tracking Sheet (GIT Sheet)
The HIV Collaborative Fund has developed a list of seven common indicators that guide reporting for all its grantee partners. More information: http://www.hivcollaborativefund.org

Appendix 2: Participant List

American Jewish World Service

www.ajws.org
- Sarah Gunther, Senior Program Officer, Africa
- Courtney Lobel, Development Officer

Ashoka: Innovators for the Public

www.ashoka.org
- Karabi Acharya, Change Leader

Echoing Green

www.echoinggreen.org
- Rich Leimsider, Director of Fellows Program

ELMA Philanthropies

www.elmaphilanthropies.org/
- Tamara Fox, Senior Director of Research and M&E

EMpower — The Emerging Markets Foundation

www.empowerweb.org
- Cynthia Steele, Executive Vice President
- Andrea Lynch, Program Officer, Latin America

Firelight Foundation

www.firelightfoundation.org
- Zanele Sibanda Knight, Director of Programs

The Fund for Global Human Rights

www.globalhumanrights.org
- Regan Ralph, Executive Director
- Jerusha Burnham, Grants Administrator and Program Associate

The Global Fund for Children

www.globalfundforchildren.org
- Maya Ajmera, Founder and President
- Victoria Dunning, Vice President, Programs
- Jerry Irvine, Vice President, Communications
- Anne Sorensen, Director of Development
- Hoa Duong, Program Officer, East and Southeast Asia
- Solome Lemma, Senior Program Officer, Africa
- Sarah Ireland, Knowledge Management and Grantmaking Operations Officer
- Michael Gale, Program Associate, Latin America and the Caribbean
- Andrew Barnes, Senior Grants Manager

Global Fund for Women

www.globalfundforwomen.org
   - Caitlin Stanton, Senior Development Officer, Philanthropic Partnerships
   - Anasuya Sengupta, Regional Program Director, Asia/Oceania

Global Greengrants Fund

www.greengrants.org
   - Baohua Yan, Program Coordinator

HIV Collaborative Fund

www.hivcollaborativefund.org
   - Solange Baptiste, Program Director, ITPC
   - David Barr, Executive Director, ITPC

International Human Rights Funders Group

www.hrfunders.org
   - Christen Dobson, Program Coordinator for Policy and Research

J. Solomon Consulting, LLC

http://jsolomonconsulting.com
   - Julie Solomon, Principal & Member

Johnson & Johnson

www.jnj.com
   - Sharon D'Agostino, Vice President, Worldwide Corporate Contributions and Community Relations
   - Anu Gupta, Director of Corporate Contributions
   - Joy Marini, Director of Corporate Contributions
   - Michael Bzdak, Director of Corporate Contributions

Mamma Cash — Fund for Women

www.mamacash.nl; www.mamacash.org
   - Gita Beker Busjeet, Programme Officer, Learning and Evaluation
   - Annie Hillar, Director of Programmes

MTV Staying Alive Foundation

http://foundation.staying-alive.org/en
   - Paul Dien, Director of Strategic Partnerships

National AIDS Fund

www.aidsfund.org
   - Michael Rhein, Director of Programs
   - Suzanne Kinsky, Program Officer

Nike Foundation

www.nikefoundation.org
   - Amy Babchek, Portfolio Manager
   - Janna McDougall, Portfolio Manager

Unbound Philanthropy
http://unboundphilanthropy.org
  • Tony Tate, Program Officer, International Programs

The Vallarta Institute and Organizational Effectiveness/The David and Lucile Packard Foundation
http://vallartainstitute.com   http://www.packard.org
  • Jeff Jackson, Co-Director/Organizational Effectiveness Consultant

Washington Area Women's Foundation
http://thewomensfoundation.org/
  • Jennifer Lockwood-Shabat, Interim Co-President & Vice President, Programs

Wellsprings Advisors, LLC
  • Michael Gibbons, Consultant

The World Bank
  • Kury Cobham, Operations Officer, Global Fund for Youth Investment
  • Akiko Ishii, Operations Officer, Global Fund for Youth Investment