Learning Alongside Grantees
Environment Program Examples and Reflections

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This essay describes the S. D. Bechtel, Jr. Foundation's approach to evaluation in its Environment Program. This approach was grantee-centric, shaped by the varied needs of nonprofits in the environment field as well as the Foundation's decision to spend down all assets by 2020 – which limited the number of years available to conduct evaluations and put new lessons to use. The Environment Program funded grantees to evaluate work they deemed critical to their missions or to build organizational capacity to conduct ongoing learning and evaluation. Knowledge gained through grantee activities informed their internal improvement efforts as well as the Foundation's grantmaking decisions.

Seven examples illustrate the range of nonprofit learning and evaluation efforts supported by the Foundation. These experiences surfaced challenges as well as recommendations, presented later in this essay, that might be instructive to other environment funders who value learning and evaluation as means to greater impact.

Evaluation in practice

1   **Golden Gate National Parks Conservancy (GGNPC).** GGNPC is an active partner to four public agencies in One Tam, a large-landscape collaborative in California, and is a vital contributor to peer-learning networks such as the California Landscape Stewardship Network and the Network for Landscape Conservation. Through One Tam, GGNPC approached the Foundation with an idea for a five-year longitudinal study to quantify the financial benefit to public agencies in the collaborative. The Foundation funded GGNPC to commission this research, which was guided by the One Tam executive office. Data was gathered through self-reporting surveys issued to each One Tam partner, interviews with each partner's staff and stakeholders, document analysis, and meeting observations. The resulting findings pointed to cost savings for public agencies in the One Tam collaborative and much more – including improved quality of stewardship practices, increased innovation, and expanded sharing of resources across agencies. The process also revealed that attempting to precisely quantify financial benefits of this large-landscape collaboration was unrealistic, leading researchers and One Tam participants to create a partnership impact model based on their collective study. Landscape collaboratives across the country now use this model to help identify impact in their respective contexts. The significant success and reach of this evaluation were made possible by the deep and sustained interest of highly networked, creative, and visionary participants. The mid-course shift to focus on partnership impact was also important to ensuring that findings and insights would be actionable.

2 **Santa Cruz Mountains Stewardship Network (SCMSN).** SCMSN is a landscape collaborative of 22 members that includes public agencies, nonprofit organizations, private companies, and a tribal entity. The collaborative came to the Foundation with an idea for a case study describing the formation of the network as well as research focused on mapping network connections and trust. Like most landscape collaboratives, participation in SCMSN required resources from partner organizations. Demonstrating the value of participation to each of these organization's leaders, funders, and stakeholders was critical to SCMSN's sustainability. Network mapping allowed participants to track connections over time (they increased) and evaluate whether participation in the collaborative was creating a more connected field (it was); both metrics helped validate the network's worth. The case study codified a network structure that was set up to leave room to incorporate emerging priorities as well as leverage philanthropic support to address those priorities. The case study also helped network members understand that they were making real progress by increasing trust among participants; this in turn laid the groundwork for deeper commitment to collaboration.

3 **Water Foundation.** The Water Foundation partners with grantees and funders to advance water solutions for communities, economies, and the environment. It was launched in 2011 by the Foundation and a group of peer funders. The founders embedded learning and improvement beginning that year due to the size, scale, and potential impact of the Water Foundation's grantmaking. Foundation-funded consultants worked with the Water Foundation's staff and funding partners to define metrics for success. All hoped that learning derived from pursuit of these metrics would guide the Water Foundation team through its formative years and also fuel the development of shared language and expectations that could enhance collaboration between funders and grantees. The evaluation journey proved challenging: it was very difficult to measure impact because water data collection in California severely lags the rate and quality needed for informed decision-making. It also became clear that it can take a long time to identify meaningful shifts in physical systems of water management. Early efforts prompted the insight that short-term evaluation of water policy work is best suited to tracking champions, public opinion, and new public investment. Experience also showed that charting the faithful and equitable implementation of policy is as meaningful as tracking new policy wins, if not more so. Finally, despite the challenges encountered with system-level evaluation, this example illustrated the significant opportunity for an intermediary organization to align its spheres of donors and grantees around shared measures of success.

4 **Water Policy Center at the Public Policy Institute of California (PPIC).** In 2014, the Foundation provided support for the launch of the Water Policy Center at PPIC. This included program and operations resources and evaluation support as the Center formed a theory of change and logic model to guide its work on water management. The Foundation also committed funding for an external evaluation – conducted three years after launch – to assess the Center's reputation, impact, and effectiveness and inform its future research and audience engagement strategies. This scaffolding of evaluation proved useful for PPIC and its Water Policy Center, helping leaders sharpen their insight into the link between program strategies and improved water policy decisions and outcomes while painting a more complete picture of how the two entities worked in tandem to drive impact. It also served to mobilize PPIC staff; they gained deeper understanding and clearer language that bolstered progress on the organization's chosen path. Finally, for the Foundation's Environment Program staff, the assessment informed next-stage support for PPIC, which featured resources that allowed the organization to respond to findings and apply lessons surfaced by the evaluator.

5 **Water Data Projects.** Realizing that water data was both crucial to effective water management and severely lacking in California, the Foundation funded a portfolio of water data projects. In parallel, the Foundation supported a study by Stanford University to monitor the progress of those projects and identify the factors that lead to useful water management tools and practices. Checking in regularly with the Stanford evaluation team allowed Environment Program staff to incorporate initial insights from the water data projects and manage through predictably unpredictable hydrologic realities. For example, some data projects were designed to help water managers respond to dry conditions, although launch of these projects occurred during wet or average years. Ultimately, the evaluation and experience of project participants confirmed that focused plans, trust, public availability, and cooperation among key players are keys to success, and that water data projects require more time than their partners initially anticipate. The study provided the basis for a set of <u>recommendations</u> for actors working to improve water data projects, including participants in the Foundation-funded Internet of Water and the California Water Data Consortium.

6   **Water Solutions Network (WSN).** WSN supports leaders from across sectors and silos to cross boundaries, connect resources, and pursue bold action for a sustainable and equitable water future. While participation in the Foundation-funded network begins with cohort-based learning, the focus of the program is to nurture an active and engaged ecosystem of water leaders over time. After researching other leadership program evaluations, Environment Program staff determined that an outcomes evaluation was unlikely to yield information that would be useful to WSN's near-term objectives, or deliver high value compared to the time and cost it would require. WSN grantees have instead invested time and resources to collect success stories, track network partnerships, and use surveys and conversations with participants to learn and continuously improve on program implementation. Their hope is that the full impact of WSN will be felt far beyond the Foundation's end date through the many decisions that participants make during the course of their careers, and via the collaborations they spark or participate in over time. The grantee partners who implement WSN are tentatively holding funds for evaluation activities in 2023, which will be the Network's fifth year of operation. Such an evaluation would likely take the form of storytelling or a targeted analysis to inform the future direction of WSN.

7   **Diversity, Equity, and Inclusion (DEI) Initiative.** The Environment Program launched this Initiative in 2019, combining intensive DEI training for grantee boards and staff with direct support to implement the beginning stages of DEI plans created by each organization. Environment Program staff chose not to fund ongoing evaluation of this Initiative, recognizing that the process for bringing DEI considerations into the core of an organization requires time and iteration. The goal was to use the months and resources available to plant meaningful seeds that would bear fruit beyond the Foundation's conclusion in 2020. Charting the explicit grantee demand for additional and expanded participation and seeing organizations move beyond planning into further grantseeking and early implementation of new strategies were pertinent evaluation metrics for the Foundation.

Challenges encountered

➤ **It takes internal leadership and organizational flexibility to ensure that evaluations are relevant.**
Stellar evaluations can make a substantive difference for an organization, although not all evaluations are worth the time and effort required to produce findings that inform meaningful decision-making. Environment Program staff have at times underestimated the amount of resources and attention that grantees need to put into an evaluation to make it worthwhile. Evaluation works best when the grantee has an internal champion who can keep the process relevant and focused – and who can understand whether, when, and how to change course as salient information becomes available.

➤ **The complexity of systems-level change can make evaluation feel incomplete or threaten its value.**
Funders that seek to change systems face complicated journeys and their evaluation efforts must be formed with complexity in mind. Working in notoriously fragmented and dynamic fields such as water management and large-landscape conservation meant that any single Environment Program evaluation would offer at best a partial understanding of how to reach meaningful outcomes on a large scale. If considerations for complexity are not designed into the process, evaluation can result in more data but no real information or insight into how to move or improve these types of systems. Environment Program staff learned that statewide systems are extraordinarily layered and interdependent, and not easily assessed. However, focusing on these systems allowed the Foundation to support impact on some of the biggest challenges facing the environment sector in California today.

Recommendations for funders

➤ **Define the audience and ensure information is useful.** Any evaluative effort should have a clearly named audience, and focus on this audience should guide its design, implementation, and application. Ask: who needs this? Who will use this? Will this information be relevant to and applicable by our intended audience? What related information is already in the field – and how will our findings add value to what our audience already knows?

➤ **Always consider equity in evaluative practice.** Foundation support of the Equitable Evaluation Initiative helped advance Environment Program staff's thinking about the relationship between equity and evaluation. Evaluation is not neutral; it has the potential to further inequity or be in service of equity. The Equitable Evaluation Framework™ offers three principles for practicing evaluation in a manner that promotes equity (paraphrased here):

- Hold the advancement of equity as central to evaluation's purpose.
- Ask and answer critical questions about equity as well as the relationship between a problem, a change effort, and the structural conditions tangled up in both.
- Design and implement evaluation in ways that are consistent with the values underlying equity work, placing an emphasis on multi-cultural validity and participant ownership.

➤ **Don't let power dynamics distort an evaluation's effectiveness.** Keeping the grantee squarely as the focus of any evaluation is essential to ensuring that the evaluation is relevant to both the grantee and the funder. Environment Program staff sought to empower grantees to decide when to pursue evaluations rather than attempt to drive the agenda, although even then sometimes both parties underestimated the full scale and requirements of an evaluation undertaking. Funders should not hold a grantee to an evaluation design they initially thought they wanted to pursue; rather, the grantmaker should be open to course corrections and stay alert for subtle signals a grantee may be sending throughout the process.

➤ **Tap existing resources and funding partnerships to achieve evaluative outcomes more efficiently.** Funders and organizations often have resources at their disposal for creating necessary feedback loops. Tapping advisory councils, engaging evaluation officers, and building on evaluations that already exist can all be efficient vehicles for collecting data, creating information, and providing feedback. When more formal evaluation is warranted, funders could explore co-funding for grantees. This calls for approaching other funders as early as possible when scoping any potential evaluation and working closely with the grantee to determine a process that will be useful to them.

Matt Wisniewski joined the Foundation in 2017 and is an associate program officer in the Environment Program. His portfolio includes land stewardship, water, and capacity-building grants, with a focus on community foundation partnerships. Prior to the Foundation he worked with numerous grassroots organizations and donors at Tides and served as a Peace Corps Volunteer in Malawi. Matt graduated from the University of California, Berkeley with a B.A. in political science. He is also an alumnus of the Coro Fellowship in Public Affairs.