

# Nonprofits and Foundations TIG

## Newsletter

### Fall 2017

#### A Note from the Co-Chairs

Hello TIG members! We have been busy throughout the spring and summer getting ready for our fall activities. The arrival of Fall is always an exciting time for us because it means that the annual AEA Conference is just around the corner. We look forward to attending the sessions and seeing our colleagues, as well as visiting with the TIG members.

This year, as usual, the TIG has an exciting program with great presentations (submitted by many of you), an interactive business meeting, and a night out with the Community Psychology and Systems in Evaluation TIGs. For more information, look inside this newsletter.

We also have an AEA 365 Blog week coming up on October. We had great submissions to select from and cannot wait to share them.

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#### AEA 365 Blog Week

We had many great submissions for the NPF TIG's AEA 365 Blog Week. TIG members really came through, so we have an exciting line-up of blogs scheduled for the week of October 9<sup>th</sup>.

##### **When Logic Models Alone Just Won't Do – Use a Conceptual Framework!**

*Kristina Jamal, Open Hearts Helping Hands and Jacqueline Singh, Qualitative Advantage, LLC*

##### **Foundations Can (and Should) Learn from Grantees**

*Cheryl Milloy, Marguerite Casey Foundation*

##### **Making Values Part of a Foundation's Evaluation Process**

*Kelly Hannum, Jara Dean-Coffey and Jill Casey, the Luminare Group*

##### **Lead with Learning**

*Kelci Price, Colorado Health Foundation*

##### **Measured Impact: Ways Evaluators Can Work with Foundations to Create a Solid Evaluation Framework**

*Shanesha Brooks-Tatum, Creative Research Solutions*

##### **Essential Elements for Fostering Learning**

*Julie Slay and Marissa Guerrero, Arabella Advisors*

##### **Helping Nonprofits Use Data to Learn (to be posted in December)**

*Chari Smith, Evaluation into Action*

## The NPF TIG Needs a Program Co-Chair

The Nonprofits and Foundations TIG is recruiting for a new Program Co-Chair for 2018. This is an exciting opportunity to contribute to the AEA Conference program. This person collaborates with the other Program Co-Chair to coordinate the conference submission reviews and submit the final TIG program to AEA. It also requires participating on the occasional leadership team phone meetings during the year.

If you are interested in this position, there are two ways you can sign up.

1. Email the TIG Co-Chairs, Karen Jackson and Susan Wolfe at [KLTJackson@outlook.com](mailto:KLTJackson@outlook.com) and [susan@susanwolfeandassociates.com](mailto:susan@susanwolfeandassociates.com) and let us know you would like to be added to the ballot.
2. Volunteer at the TIG business meeting at the AEA Conference.

Elections will be held in January 2018.

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## Business Meeting

This year the NPF TIG Business Meeting will be held on Thursday, November 9<sup>th</sup> from 5:15 p.m. to 6:00 p.m. in the Taylor Room. We are planning for an interactive meeting that will include a panel discussion to create dialogue between nonprofits and foundations. Keeping with the learning theme of this conference, this discussion will provide nonprofits and foundations with an opportunity to learn from one another.

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## Let's Get Social!

The Nonprofits and Foundations TIG will be sharing a social event with the Independent Consulting TIG, the Community Psychology TIG, and the Systems in Evaluation TIG. Here are the details:

**DATE:** Wednesday, November 8, 2017

**TIME:** 8:00 p.m. to 10:00 p.m. (or whenever you decide to leave)

**LOCATION:** Duke's Counter (directly across the street from the National Zoo)  
3000 Connecticut Ave., NW, Suite J

**DETAILS:** **You are on your own to order and pay for your food and drinks.** Just show up during the time-period and say hello to your colleagues and meet some new ones.

## Conference Program

We have an exciting conference program planned. To make it easy for you to prepare your conference schedule we have summarized it in this table.

| Time                                   | Title                                                                                                                                                     | Presenters                                                                                | Room                     |
|----------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------|--------------------------|
| <b>Wednesday, November 8, 2017</b>     |                                                                                                                                                           |                                                                                           |                          |
| <b>3:15 p.m.<br/>to<br/>4:15 p.m.</b>  | From Learning to Action:<br>Employing Evaluation to Advance<br>the Public Good                                                                            | Kathy Newcomer                                                                            | Keynote                  |
| <b>4:30 p.m.<br/>to<br/>6:00 p.m.</b>  | Building an Evaluation and<br>Learning System: Three Case<br>Examples from Foundations                                                                    | Suzanne Kennedy Leahy<br>Chera Reid<br>Kelci Price<br>Ian Watt                            | Virginia C               |
|                                        | Shifting the Balance of Power:<br>Evaluating a Foundation's Effort to<br>Build Local Advocacy Capacity in<br>Sub-Saharan Africa                           | David Devlin-Foltz<br>Helena Choi<br>Rhonda Schlangen<br>Susan Y. Wood<br>Carlisle Levine | Roosevelt 2              |
|                                        | The Strategy Playbook: A Tool to<br>Support Collective Impact                                                                                             | Albertina Lopez<br>Mehrnaz Davoudi<br>Lynda Lee                                           | Taylor                   |
| <b>6:15 p.m.<br/>to<br/>7:15 p.m.</b>  | Making Foundation Evaluation<br>More Useful: The Potential of<br>Evaluation Advisory Groups                                                               | Clare Nolan<br>Matthew Carr<br>Gabriel Rhoads<br>Melinda Tuan                             | Park Tower<br>Suite 8223 |
| <b>7:00 p.m.<br/>to<br/>8:30 p.m.</b>  | Lose the Paper, Gain Better Data                                                                                                                          | Samantha Bernice Moreno<br>Elain Donato<br>Ana Flores                                     | Poster<br>Reception      |
| <b>Thursday, November 9, 2017</b>      |                                                                                                                                                           |                                                                                           |                          |
| <b>8:00 a.m.<br/>to<br/>9:00 a.m.</b>  | Expanding the Bench in<br>Performance Management: RBA<br>as a Learning Tool to Increase the<br>Numbers of Underrepresented<br>Professionals in Evaluation | Marian Esi Amoa<br>Karen Hopkins<br>Randy Nelson                                          | Roosevelt 1              |
|                                        | An "Inconvenient Truth" for<br>Evaluators: Credibility-Based<br>Programming for Small Non-<br>Profits can be Optimal                                      | Elizabeth Ashbourne<br>Amy R. Sokal<br>Ria Hawks<br>Dale Miller Hill                      | Tyler                    |
|                                        | Not Just About Us, But for Us:<br>Using Participatory Methods in<br>Case Studies to Catalyze<br>Organizational Learning                                   | Tanya Beer<br>Anne Cullen Puente<br>Kurian Thomas<br>Susan Parker                         | Virginia B               |
| <b>9:15 a.m.<br/>to<br/>10:15 a.m.</b> | Dialogues on Race & Class in<br>America                                                                                                                   | Melvin Hall                                                                               | Keynote                  |

| Time                           | Title                                                                                                                                                         | Presenters                                                                                                                                                   | Room                                   |
|--------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------|
| 10:30 a.m.<br>to<br>11:15 a.m. | Scaling Global Nonprofit Evaluation Through Technology and Collaboration                                                                                      | Nick Hamlin<br>Britt Lake<br>Sarah Ellison                                                                                                                   | Virginia B                             |
| 11:30 a.m.<br>to<br>12:15 p.m. | Creating a Viable Organizational Process for Meta-Evaluation Capacity Building                                                                                | Erin Bock<br>Jean A. King                                                                                                                                    | Park Tower Suite 8210                  |
|                                | The Practice and Promise of Evaluation in Australian Non-Profit Organizations                                                                                 | Alicia McCoy                                                                                                                                                 | Virginia B                             |
| 12:15 p.m.<br>to<br>1:15 p.m.  | When Does Flexibility Become Contortion? Parameters for Successful Negotiations between External Evaluators and Clients on the Language in Evaluation Reports | Rees Warne                                                                                                                                                   | Table 28, Birds of a Feather Gathering |
| 1:15 p.m.<br>to<br>2:00 p.m.   | Serving Multiple Masters: Evaluating Projects Funded by Multiple Agencies                                                                                     | Erin Bunger<br>Lina M. Acosta                                                                                                                                | Park Tower Suite 8210                  |
|                                | Building Individual and Collective Capacity Among Nonprofits Working to Reduce Poverty and Homelessness                                                       | Susan M. Wolfe<br>Kyrach K. Brown<br>Ann Webb Price                                                                                                          | Virginia B                             |
| 2:15 p.m.<br>to<br>3:00 p.m.   | Random Control Trials: The WorkAdvance Experiences of a Practitioner, Funder, and Convener                                                                    | Rebecca Kusner<br>Jill Rizika<br>Bethia Burke                                                                                                                | Park Tower Suite 8210                  |
|                                | Using the Practice Profile in Order to Make Foundation Strategy Evaluable                                                                                     | Douglas Easterling<br>Allison Metz                                                                                                                           | Washington 6                           |
|                                | Making the Move to a More Dynamic Grantmaking Strategy: How Does Evaluation Keep Up?                                                                          | Laura Hollod<br>Lisa Frantzen                                                                                                                                | Wilson A                               |
| 3:15 p.m.<br>to<br>4:15 p.m.   | Successful Tools and Strategies for Nonprofit Data Collection                                                                                                 | Laura Beals<br>Kara Colten Bradley<br>Alysse Henkel<br>Shahid Umar<br>Helen Highley<br>William James Lin<br>Sydney A. Merz<br>Jamie Orose<br>Travis Rutledge | Jackson                                |
|                                | Advanced session on designing and implementing an evaluation when the foundation is part of the intervention                                                  | Kelci Price<br>Meg Long<br>Rebecca Ochtera<br>Jewla Lynn                                                                                                     | Park Tower Suite 8205                  |
|                                | The intersection of Evaluation and Strategy: Exploring the Role and Tools Needed for Evaluators to be at the Strategy Table                                   | Jewla Lynn<br>Hallie Preskill<br>Marcie Parkhurst<br>Tanya Beer                                                                                              | Park Tower Suite 8209                  |

| Time                             | Title                                                                                                                                 | Presenters                                                                                                                                                             | Room                  |
|----------------------------------|---------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------|
|                                  | Funders, Foundations, and Grantees: High Impact Investments and Collaboration through Evaluation                                      | Tova Hettinger<br>Caren Bacon<br>Catherine Harbour<br>Nina Riza Sabarre<br>Natalie McKenzie Scarpa<br>Jessi LaRose<br>Sara Bobmeyer<br>Casey Whalen<br>Deborah L. Rugg | Roosevelt 1           |
|                                  | Blurring the Lines: Balancing Accountability and Learning to Maximize Impact                                                          |                                                                                                                                                                        | Virginia A            |
|                                  | Building Organizational Appetite for Measurement, Learning, and Evaluation                                                            | Sara Afflerback<br>Sarah Stachowiak<br>Devon Meade<br>Nadine M. Long                                                                                                   | Washington 3          |
| <b>4:30 p.m. to 5:15 p.m.</b>    | Driving to Excellence on the Data Highway                                                                                             | Batya Kopelowitz                                                                                                                                                       | Maryland B            |
|                                  | Seeing the Forest Through the Trees: A Donor's Trial and Error in Portfolio Evaluation                                                | Megan Colnar<br>Zsuzsanna Lippai                                                                                                                                       | Park Tower Suite 8210 |
| <b>5:15 p.m. to 6:00 p.m.</b>    | Nonprofits and Foundations TIG Business Meeting                                                                                       | Karen Jackson<br>Susan M. Wolfe                                                                                                                                        | Taylor                |
| <b>Friday, November 10, 2017</b> |                                                                                                                                       |                                                                                                                                                                        |                       |
| <b>8:00 a.m. to 9:30 a.m.</b>    | Learning in a Time of Change                                                                                                          | Marcie Parkhurst<br>Srik Gopal<br>Subarna Mathes<br>Chera Reid<br>Pamela Schwartz                                                                                      | Park Tower Suite 8217 |
|                                  | Creating Evaluation-Driven Learning Environments: Application of Rapid Cycle Learning within National Leadership Development Programs | Lisa Frantzen<br>Denise E. Herrera<br>Gaurav Dave<br>Jeff Moy<br>Nora Marino<br>Lydia Isaac                                                                            | Roosevelt 2           |
| <b>9:45 a.m. to 10:45 a.m.</b>   | How to Create Effective Presentations                                                                                                 | Dr. John Medina                                                                                                                                                        | Keynote               |
| <b>11:00 a.m. to 11:45 a.m.</b>  | Why Can't We Be Friends? Learning to Navigate Evaluator-Intermediary-Funder Relationships to Maximize Learning and Impact             | Malgorzata Long<br>Clare Nolan<br>Kimberly A. Edmunds<br>Michael Matsunaga                                                                                             | Madison A             |
|                                  | Strategies for Connecting Values to the Evaluation of Leadership Development Efforts in Foundations                                   | Kelly Hannum<br>Claire Reinelt<br>Valerie Ehrlich<br>Micela Leis<br>Deborah Meehan                                                                                     | Park Tower Suite 8210 |

| Time                                  | Title                                                                                                                       | Presenters                                                                                                                                         | Room                  |
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|                                       | "But You Can't Measure What I Do" – The Success Rubric as a Tool to Measure What Matters                                    | Lauren A. Silverstein<br>David Grant                                                                                                               | Virginia B            |
| <b>1:45 p.m.<br/>to<br/>3:15 p.m.</b> | Journey Toward Using Data to Provide Strategic Guidance and Learning                                                        | Pamela Schwartz<br>Tiffany Clarke<br>Hallie Preskill                                                                                               | Hoover                |
|                                       | Evaluation Evolution: How a Nonprofit's Evaluation Capacity Needs Change Over Time                                          | Isaac D. Castillo<br>Mary Kopczynski Winkler<br>Daniel Tsin                                                                                        | Park Tower Suite 8219 |
|                                       | Evaluating Leadership for Social Change                                                                                     | Carlyn Orians<br>Paula Rowland<br>Alexander Chew                                                                                                   | Roosevelt 5           |
| <b>3:30 p.m.<br/>to<br/>4:15 p.m.</b> | Evaluation in Nonprofits and Foundations: Generating New Insights, Fostering Culture of Learning, and Organizational Change | Karen Jackson<br>Janine Quintero<br>Charles H Gasper<br>Helen Highley<br>Luz Gomez                                                                 | Virginia A            |
|                                       | Approaches to Learning in Challenging Moments                                                                               | Ellen Irie<br>Michael Patrick Arnold                                                                                                               | Virginia B            |
| <b>5:30 p.m.<br/>to<br/>6:15 p.m.</b> | Supporting and Evaluating DEI in Grant Making: From Theory to Practice                                                      | Julie Slay, Nancy Chan                                                                                                                             | Park Tower Suite 8210 |
|                                       | Whole is Greater than the Sum of Parts: Designing a Portfolio Measurement Approach                                          | Tanya Lalwani<br>Christina Bernadotte<br>Julie Rajaratnam<br>Kristy Kade                                                                           | Wilson C              |
| <b>6:30 p.m.<br/>to<br/>7:15 p.m.</b> | Effective Evaluation: Lessons Learned from Nonprofits and Foundations Working in Communities Across Diverse Sectors         | Daniel Finkelstein<br>Dominica McBride<br>Jennifer Mortensen<br>Gene Ann Shelley<br>Dana M. Petersen<br>Kaye Kavanagh<br>Gail Vessels<br>Bela Moté | Roosevelt 3           |
| <b>Saturday, November 11, 2017</b>    |                                                                                                                             |                                                                                                                                                    |                       |
| <b>8:00 a.m.<br/>to<br/>9:00 a.m.</b> | From Iteration to Impact: How Foundations are Using New Models of Evaluation to Learn in Real Time                          | Rachel Mosher-Williams<br>Chera Reid<br>Courtney L. Brown                                                                                          | Park Tower Suite 8210 |
|                                       | Accelerating Evaluation: A Think Tank with Michael Scriven and the Faster Forward Fund Advisory Committee                   | Michael Scriven<br>E. Jane Davidson<br>Sarah Mason<br>Charmagne Campbell-Patton<br>Allyson Krupar<br>Anna Malsch                                   | Park Tower Suite 8217 |

| Time                                    | Title                                                                                                                                      | Presenters                                                                                                                                    | Room                  |
|-----------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------|-----------------------|
| <b>9:15 a.m.<br/>to<br/>10:00 a.m.</b>  | The Art of Adaptation: Insights from Systems and Community Change Evaluation                                                               | Julia Coffman<br>Sonia Taddy Sandino<br>Clare Nolan<br>Bernadette Sangalang                                                                   | Park Tower Suite 8210 |
|                                         | Scaling social innovation: Fostering Strategic Learning through Evaluation to Support Strategies that Scale                                | Katelyn Mack<br>Elizabeth McGee<br>Ross Lescano Lipstein                                                                                      | Virginia A            |
|                                         | Mixing Apples with Oranges – Using Meta-Analysis to Synthesize Evaluations of a Diverse Portfolio: Example from the Social Innovation Fund | Xiaodong Zhang<br>Jing Sun<br>Lily Zandniapour                                                                                                | Virginia B            |
| <b>10:15 a.m.<br/>to<br/>11:00 a.m.</b> | Bringing Stakeholders to the Table: Using Data Placemats for Participatory Analysis in Nonprofit and Foundation Settings                   | Laura Beals<br>Sara Afflerback<br>Susan Foster<br>Kendra M. Lewis                                                                             | Roosevelt 3           |
| <b>11:15 a.m.<br/>to<br/>12:00 p.m.</b> | Evaluation and Learning in an Uncertain Political Environment: Lessons from the Affordable Care Act (ACA)                                  | Joelle Katherine Greene<br>Sonia Taddy Sandino<br>Lori Nascimento<br>Raul Martinez<br>Nicole Pritchard<br>Kristina Faeldan<br>Victoria Perera | Virginia A            |
| <b>12:15 p.m.<br/>to<br/>1:15 p.m.</b>  | Call for Embedded Evaluation                                                                                                               | Rashad Massoud, MD, MPH, FACP                                                                                                                 | Keynote               |

### NPFTIG LEADERSHIP CONTACT INFORMATION

We welcome questions and comments. Our contact information is below:

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|------------------|----------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------|
| Co-Chair         | Karen Jackson<br>Katalyst Innovative Consulting Services<br>Greensboro, NC | Tel: <a href="tel:601-347-6093">601-347-6093</a><br>Email: <a href="mailto:kltjackson@outlook.com">kltjackson@outlook.com</a> |
| Co-Chair         | Susan M. Wolfe<br>Susan Wolfe and Associates, LLC<br>Dallas, TX            | Tel: 214-580-1748<br>Email: <a href="mailto:susan@susanwolfeandassociates.com">susan@susanwolfeandassociates.com</a>          |
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