

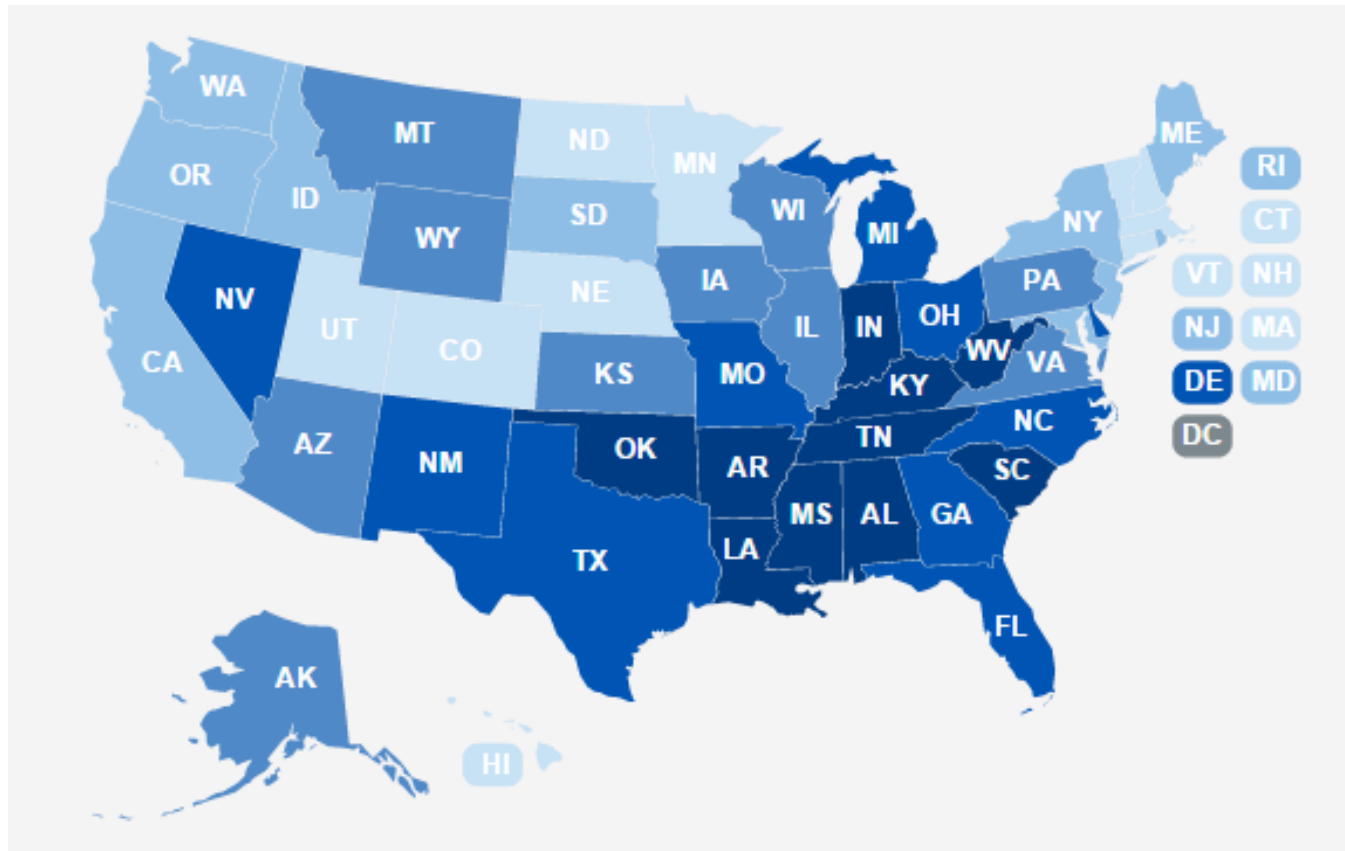
# Evaluation in Times of Strategy Shift

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# Goal: To be the healthiest state in the nation



# Strategic Philanthropy

## Changing Roles in Refreshing Strategy

Develop and refine organizational strategies & goals

Change grant making style

Refine evaluation & learning models



# Evaluation's Unique Contribution

- 1 Initial Launch:** Question assumptions and refining models and measurements
- 2 Implementation:** Data collection and reports for future strategy
- 3 Continuation:** Monitoring progress and revisiting plans

# Steps to Strategy Refresh

## Initial launch of first 5-year strategic plan

Philanthropy Teams	Evaluation Roles
Goal Setting	<i>Build shared language; Refine measurement</i>
Theory of Change	<i>Question assumptions &amp; gaps</i>
Prioritization	<i>Gather and report past work</i>

# Challenges in Initial Launch

- **Ownership**
- **Static document**
- **Gaps**
- **Size and scope**



# Steps to Strategy Refresh

## Implementation of new strategies

Philanthropy Teams	Evaluation Roles
Funding Opportunity Creation	<i>Create plans for measurement and learning</i>
Granting Decisions	<i>Relate to plan; Capture needs/questions</i>

# Evaluation and Learning Models

Organization Goal



Strategy



Grant Area



Individual Grantee

Monitor progress towards goals

Monitor progress towards metrics

Measure using cluster evaluations

Monitor grant progress



# Challenges in Implementation

- **Fitting Grants to Strategy**
- **Timing of Evaluation**
- **Evaluation Prioritization**



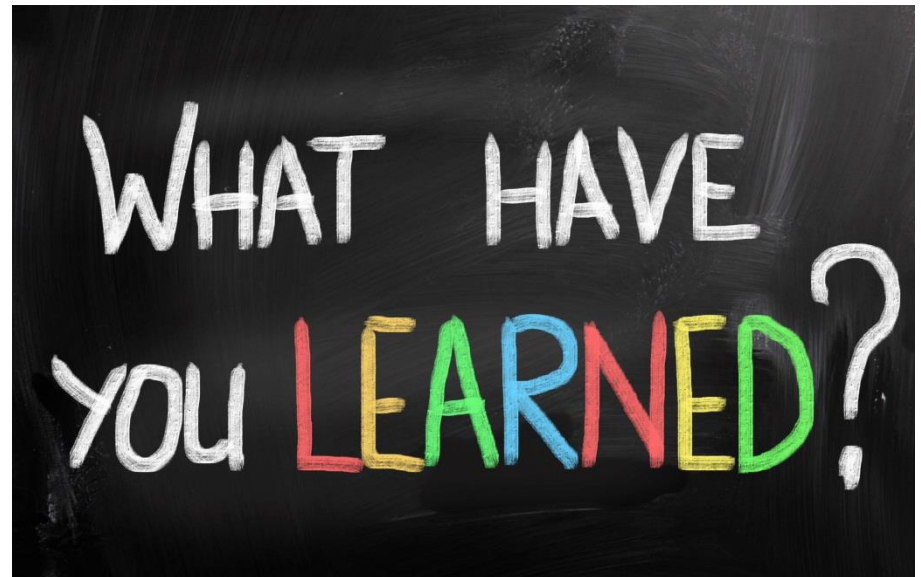
# Steps to Strategy Refresh

**Continued progression towards goals**

Philanthropy Teams	Evaluation Roles
Reporting	<i>Synthesis of information</i>
Monitoring Grant	<i>Technical Support</i>
Revising Plans	<i>Provision of information</i>

# Challenges in Continuation

- Share Learnings
- Data Lag
- Priority Shifts
- Burn Out



# Evaluation within a Strategy Team

- Building culture of strategic thinking
- Creation of reports and processes to aid decisions
- Vigilant listening and feedback





# Questions?

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