

Philanthropic Fundamentals: Evaluation and Accountability

By **YOSSI PRAGER**

Is there a difference between charity and philanthropy? I believe there is.

Charity is giving money, a contribution made to a person or organization perceived to be worthy or needy. Philanthropy, however, is more complicated and more ambitious: the effort to use money and other resources to accomplish a defined goal shared by the philanthropist and the funded organization.

There are two consequences to this definition of philanthropy. First, while a charity giver acquits himself by mailing a check, a philanthropist seeking to advance her own goals becomes a partner in the effort. As a partner, she scours memory banks and contact lists in search of ideas, expertise and sometimes even additional funding that will enhance the program or organization. Second, because the philanthropist makes grants in order to advance defined goals, she insists on accountability and evaluation both to measure impact (which can be thought of in business terms as a return on investment) and to identify ways in which the funded effort can be improved.

Unfortunately, serious evaluation remains the exception, rather than the rule, in the Jewish non-profit world. While grant proposals often include budget line items for evaluation, the funded organizations rarely initiate probing evaluations for fear that the results could cost them further funding. From the philanthropists' perspective, there is also a temptation to avoid evaluation on the grounds that it is time-consuming and expensive. I have heard more than one funder ask, "What will it show anyway?" Based on our experience at AVI CHAI, which funds programs that both promote Jewish commitment and draw together Jews of different religious backgrounds, the answer is "A whole lot."

AVI CHAI is admittedly in an uncommon position because it has both significant financial resources and a staff to oversee its programs. As a result, we undertake some very expensive evaluation projects that would not likely be undertaken by smaller foundations. These include efforts to measure the achievement of students using the new NETA Hebrew language curriculum; to assess changes in family Jewish practice as a result of day school enrollment; and to ascertain classroom usage of *BabagaNewz*, a monthly Jewish values-based magazine that is sent to nearly 35,000 students in over 1,000 subscribing schools. However, most of AVI CHAI's evaluations cost in the range of \$5,000 to \$15,000, which is within the reach of smaller foundations as well. The sidebar provides an example of one program that improved considerably as a result of a "low-budget" independent evaluation that we commissioned.

In brief, here are the most important points to consider in planning evaluations:

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- 1 In order for an evaluation process to be useful, donors and grantees must agree with great specificity about measurable goals for the program. Even purely quantitative goals need careful thought (e.g., what does it mean to “reach” 5,000 people?). We recently learned that when projects involve the internet, measuring the number of page views and the length of visits to the site is more useful than counting visitors. However, truly challenging issues arise in defining the qualitative goals — the nature and extent of the social, educational or cultural impact of the program. Without mutually-satisfactory goal definitions, there is a risk that the philanthropists’ attempts to measure whether *their* goals are being met will generate conflict with grant recipients who have different objectives in mind.
- 2 Grant recipients should provide a schedule of deliverables. Evaluation (and grant payments) can be planned around the schedule. In any case, the nature of the evaluation should be decided up front, especially if the evaluation mechanism requires collection of baseline data.
- 3 Grantee reports, supplemented by philanthropist site visits, can be important sources of information

and accountability. It is the philanthropists’ responsibility to make sure that grant recipients understand what should be included in reports (e.g., hard data rather than anecdotal information) and also to ensure that reporting requirements are not so onerous as to divert the grant recipients from the work for which they have received funding.

- 4 Independent evaluations come in two rough categories: *formative* evaluations in the projects’ early stages and *summative* or *outcome* evaluations at the conclusion of projects. Both have value, and both can be accomplished in either rough-and-dirty or serious ways. The benefits of outcome evaluations should be clear: they reveal the extent to which programs have met their goals. Formative evaluations have a different goal — to identify issues early on so that the project can be tweaked and improved. We have found formative evaluations within the first year of a project to be extremely useful.
- 5 Working with the grant recipient, philanthropists should choose evaluators who will be tactful and yet intellectually aggressive and incisive in investigating the funded project. The person need not be a

“professional” evaluator (it helps to see a sample of an evaluator’s writing to ascertain whether the style will match your needs). In each case, the evaluator should develop a written evaluation plan, which must be mutually satisfactory to the philanthropist and the grant recipient. Evaluation must be conducted in an environment of trust, in which it is understood that all parties seek only the truth for the benefit of the ultimate consumers of the funded programs.

There is significant literature on evaluation, and interested philanthropists will have no difficulty finding additional information in the general literature about philanthropy.

A final thought: most philanthropists see evaluation as a way of holding grant recipients accountable. However, the most important function of evaluation may be holding philanthropists accountable, at least to themselves. With no meaningful government regulation and little communal scrutiny (who, after all, wants to bite the hand that may someday feed them), it is all too easy to delude ourselves about the impact we are making. We owe it to ourselves, as much as to our grantees and the ultimate program beneficiaries, to ascertain whether we are using our resources effectively. 🌸

LEARNING FROM EVALUATIONS

In an effort to address the critical need to recruit and train new teachers for the growing number of Community high schools and middle schools in North America, AVI CHAI made a substantial grant to the Pardes Institute for Jewish Studies to create a two-year teacher training program that awards both a certificate from Pardes and a Masters in Jewish Education from Hebrew University. While the program is based in Israel, the participating students are from the Diaspora, and all make a three-year commitment to teaching in North America upon completion of the program.

AVI CHAI commissioned an evaluation at the end of what we and Pardes believed to be a successful first year of the program. The evaluation report offered a central surprise:

The students and evaluator concurred that while the Jewish studies classes at Pardes were

first rate, the pedagogy and fieldwork components of the program needed significant enhancement. Furthermore, the students expressed concern about the administration of the program. It was clear that Pardes was experiencing challenges in the transition from the culture of a *beit*

midrash (house of study) to the rigorous mode of a professional training program. At the same time, the students believed that AVI CHAI was managing the program from a distance without being available to discuss student concerns. All told, the evaluation highlighted important strengths but also significant concerns.

The evaluation spurred AVI CHAI to approve additional funding to enable Pardes to hire a program director who revamped the pedagogy program and who also worked with Hebrew University to develop a schedule that would enable students to take more courses relevant to their future careers. Pardes put more energy into transforming their institutional culture and soliciting input from students. For its part, AVI CHAI gave Pardes more leeway in shifting budget lines in order to meet students’ needs; with additional budgetary control, Pardes made more decisions in-house, which increased student satisfaction.

One year into the restructured program, we asked the same evaluator to conduct a second evaluation. This time, he (and the students interviewed) assessed the program as first-rate in many of the respects that had been critiqued earlier. The first two classes of Pardes graduates are now educating and inspiring hundreds of day school students across North America. — YOSSI PRAGER

