

Wilburforce Foundation: A Comprehensive Learning Approach

The Wilburforce Foundation works in close partnership with its grantees and uses evaluation to advance its own learning, refine strategies, and build capacity of grantees. Taking this comprehensive approach to evaluation has yielded closer relationships, greater insights, and strategies that are more likely to achieve their intended goals.

The Wilburforce Foundation is a relatively young foundation focused on creating a network of protected core reserves, corridors, and buffer zones across Western North America that will support ecologically effective landscapes and viable wildlife populations. The Foundation works closely with grantee organizations, building long-term relationships with organizations to actively advance conservation solutions. On average, Wilburforce is funding 150 groups per year – of which 85 receive approximately 85% of total annual grant funding. The majority of these core grantees have received annual funding for the past 6 years, and some have a history of 7 or more years of continuous funding.

In approaching its work, the Wilburforce Foundation recognizes that its success hinges on the strength and capabilities of grantee organizations. In fact, the Board of Trustees has made capacity building and evaluation a priority since the Foundation's inception. The Foundation made the unusual decision of hiring its first Program Officer in 1998 to work on evaluation, not grantmaking. Paul Beaudet, now Associate Director, was charged from the very start with figuring out how to integrate evaluative thinking at the grantee and foundation levels to help achieve the Foundation's mission. According to Beaudet, *"our Board wanted us to incorporate feedback loops into our practices and for us to be a learning organization... Evaluation is mostly about learning for us – there is some emphasis on accountability, but this is mostly about improving as opposed to proving. We work with a very small number of organizations, and we have developed long-term relationships, so learning becomes even more important as we strive to move forward toward our goals."*

Over time, the Board directive to evaluate and learn has evolved into a few streams of activity: grantee reporting, occasional formal evaluations, and ongoing evaluation capacity building for grantees.

Wilburforce Foundation

- \$6 million in assets as of 2006. Note that the Foundation's assets for grantmaking are contributed each year.
- Based in Seattle, WA and Bozeman, MT
- Funds environmental issues in the Western U.S. and Western Canada
- Founded in 1991
- Number of staff: 10
- Evaluation Staff: Yes



Grantee Reporting

Like with most foundations, basic grantee progress reports are a component of Wilburforce's evaluation activity. These are seen as "the baseline way of getting information from grantees," with a timeline appropriate for informing annual funding decisions. *"We structure the progress report very similarly to the proposal, and we look at the things that they did that they didn't put in the proposal, the things that they didn't do that were in the original proposal, and the changes in context (e.g., staff, funding, political environment) – connecting the dots between proposals and looking for evidence that grantees are oriented toward outcomes."* Because the Wilburforce focus emphasizes learning rather than just accountability, staff read these progress reports with a careful eye, interested in ways in which the information should shape their decisions. According to Beaudet, *"as a result of this process, we've changed our funding recommendations, made new kinds of capacity investments in organizations, and funded new issues that emerged."* Importantly, the grantee reporting process is seen not as a punitive process, but as an opportunity to better target the supports provided to grantees. Most critical is the fact that each year the context of each organization may change – with new staffing or an entirely different policy environment. In order to be effective, the Foundation's funding recommendations need to take this into account each year.

Despite the rewards of this process, Wilburforce staff also find managing the annual volume of reports to be challenging, and they are making some changes – moving from an annual exchange of paper to a process of grantee reporting through conversations and site visits. *"The progress report process has been fairly labor-intensive – We find that we get more and better information from site visits than we do from a paper-based approach. So we're trying to get out of the transactional approach and more into an "interactional" approach – 'let's talk' rather than 'write us a report.' We think it's less labor-intensive for the grantee, and it gets us better information."* This transition underscores the Foundation's emphasis on learning and the value they have found in the frequent exchange of information with grantees.

Beaudet sums up his learnings about grantee reporting with a few words of advice: *"Use what you ask for, know the organizations you are working with, and recognize that a paper-based process has its limitations."*

Formal Evaluations

The Wilburforce Foundation occasionally supplements its ongoing learning processes with formal evaluations. It recently completed a formal evaluation, in partnership with Organizational Research Services, focused on funding for scientific research in its Yellowstone to Yukon program. The Foundation's strategy centered on the premise that effective policy making is based on sound science, and asked scientists to partner with advocacy organizations to secure research funding. The Foundation believed that good science could better inform advocacy, which in turn could lead to better policy, or improved land and wildlife management practices. After three years of funding these arrangements, all of the grantees and their major partners were surveyed.

The findings from the evaluation were striking, and indicated that the Foundation needed to make adjustments to its Theory of Change and funding approach. *"We found that we needed to focus more on the partnership and the relationships between scientists and conservation organizations. Many scientists were just 'partnering' with advocacy organizations on paper rather than creating a real working relationship. On the other hand, in cases where scientists were truly partnering with advocacy organizations, we were seeing some success so our original premise was reinforced."* The evaluation caused Wilburforce to reconsider two components of its original strategy.

- *"We needed to focus more on the partnerships, making sure that they went beyond paper."*
- *"We changed our grantmaking process to explore the quality of the relationship up front"*

Evaluation Capacity Building for Grantees

In order to best support grantees, the Wilburforce Foundation contracts with TREC (Training Resources for the Environmental Community) to provide organizational development resources and a customized approach to defining and tracking progress with each core grantee. Consistent with the Wilburforce approach, TREC's support has an emphasis on learning:

"TREC provides expert assistance in program evaluation. We believe evaluation is a core management function for all nonprofits that can lead to important organizational learning and reflection. The end result: a stronger and healthier organization. By working together as partners, we will help you identify measures of success for your programs and campaigns, collect and analyze data to determine whether you've met your expectations, and then use what you have learned to improve your future work." - <http://trec.org/services/planning-eval.asp>

Wilburforce has found that the TREC grantee support advances its own mission. *"By benefiting grantees, we believe we also benefit – we hope that the capacity building that we undertake furthers our goals."*

Focus of Grantee Reporting

- Overall progress of the organization or project (e.g., news, victories, setbacks, surprises)
- Activities
- Evaluation efforts undertaken/Measures of success
- Notable organizational capacity issues
- Budget reporting

Evolving Approach

While the Wilburforce Foundation has found ways to use evaluation to build better relationships and strategies, the staff and Board continue to ask new questions and see new opportunities for evaluation tools. Beaudet and the Foundation expect to continually evolve their approach to evaluation. "Moving forward, a whole range of questions interest us:

- *How do you move to a relationship-based process, identify outcomes jointly with grantees, and develop more meaningful evaluation strategies without becoming a needlessly meddlesome funder?*
- *What benchmarks are helpful to us, beyond just counting acres protected at the end of 3 or 5 or 10 years?*
- *Do the groups we fund see themselves as partners and what common outcomes/indicators could be used?*
- *Can we better communicate to our funded groups the ways in which they are playing a critical role in a larger strategy?*
- *How are all of the groups we're funding collectively moving us forward on issues we care about?"*

