

THE F.B. HERON FOUNDATION

RAISE Texas Action Summit

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Helping People and Communities to Help Themselves

THE F.B. HERON FOUNDATION | Grants and Investments

What are we looking for:

- Close fit with program guidelines
- Strong commitment to accountability
- Fiscal integrity and strength
- Strong connection to community members and market players
- Consistent delivery of results
- Demonstrated track record and impact

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What does having impact *mean*:

- Positive change in people's lives
- Making a positive difference in the community
- Effectiveness in serving a mission

AND

- Being able to show it!

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THE E.B. HERON FOUNDATION | Integrated Scorecard – Programs

				1	2	3	4	5	6	7	
PO	Organization	City	State	Advances Mission	Impact Spectrum	Sets Objectives & Makes Progress	Program & Mgmt Resources	Fiscal Integrity & Strength	Outputs/ Outcomes/ Scale	Ldrship in Field or Mkt	Overall Grade
CP	Mullan Community Development Corporation	Detroit	MI	B	System	C	B	B	B	A	B
JM	Khor Community Development Corporation	New York	NY	B	System	A	B	A	A	A	A

A = **Top Performance** (Meets all/significantly all of the criteria)
B = **Strong Performance** (Meets most of the criteria)
C = **Satisfactory / On an Upward Path** (Meets some to majority of criteria)
D = **Unsatisfactory** (Meets little or none of the criteria; deficient perf. in many areas)

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THE E.B. HERON FOUNDATION | Assessing Impact

Why we do it:

- Core value
- Stewardship
- Are we making a difference?
 - Translation: Are we deploying resources as effectively as possible? Making the best bets?

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THE E.B. HERON FOUNDATION | Assessing Impact

How we do it:

- Guiding principles
 - Keep it simple
 - Keep it practical
 - Keep it closely tied to impact on people and communities
- Maintain a sense of humor
- Maintain a sense of humility

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In *Evaluation in Philanthropy: Perspectives and Stories from the Field*, GEO found that grantmakers' views of evaluation are changing in five key ways. Grantmakers increasingly recognize that:

- It's about improvement, not just proof.
- It's about contribution, not attribution.
- It's about learning with others, not alone.
- It's about going beyond the individual grant.
- It's about learning from failure.

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