

The logo features a large green circle centered on a blue background. A red circle is partially visible in the top-left corner, overlapping the green circle. The text "OMG CENTER" is centered within the green circle.

OMG CENTER

OMG Center for Collaborative Learning

Informing Strategy through Evidence-Based Decision-Making

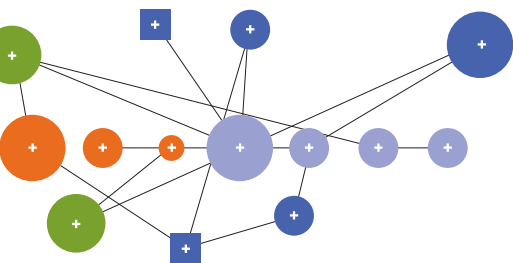
Foundations require solid, relevant data to evaluate the impact of their investments and inform their grantmaking strategies. Similarly, nonprofits need data to assess program effectiveness, redesign services, and guide management and staffing decisions. OMG helps foundations and nonprofits identify which indicators are appropriate to track, develops optimal methods for tracking them, and coaches its clients on how to interpret findings. OMG also conducts research to support its clients in the development of new strategies and programs.

RESEARCHING MARKET INTEREST AND CONSTRUCTING A BUSINESS PLAN

OMG helped the **Surdna Foundation** launch the Strategic National Arts Alumni Project (SNAAP), a national online survey system to collect, track, and disseminate data about the career pathways of art school alumni, whether or not the alumni pursued a career in the arts. Through a market survey, OMG documented a strong interest in the proposed system. OMG then developed a five-year business plan. The plan identified the scale of the projected market, income, and costs; a set of potential funders; a survey administrating organization; governance; marketing recommendations; and legal requirements. Guided by a sound, objective blueprint, the program officer gained support from her board and other funders to launch SNAAP in 2008. As the first data system of its kind, SNAAP will allow arts educators and those in the larger arts field to make ongoing refinements to their curricula and programs to better support their students and graduates.

DEVELOPING DATA COLLECTION SYSTEMS TO UNDERSTAND PROGRAM EFFECTIVENESS

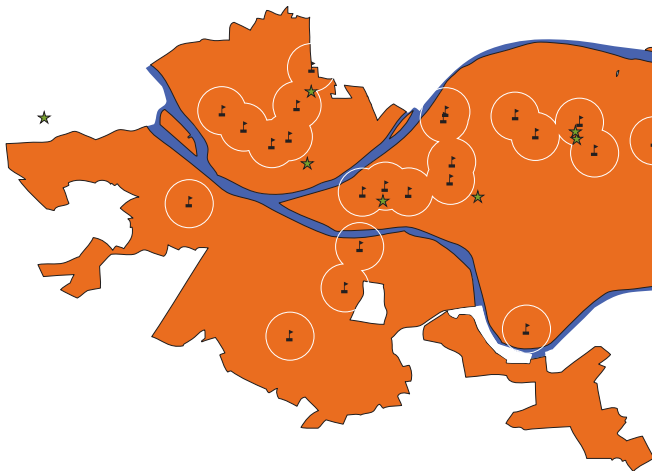
The McCabe Program is one of the earliest investments of the **Lumina Foundation for Education**, a relatively new national foundation singularly focused on increasing college access and success to under-served students. After several years of early grantmaking, Lumina wanted to know which among the thirty programs across the country it funded had the most impact on its students. As one evaluation method among several, OMG, with the National College Access Network, designed a web-based system for grantee program data collection and analysis. Using the data from this system, OMG's evaluation provided answers to the foundation about factors that impacted effectiveness. Evaluation findings revealed that peer-to-peer programs, a close personal relationship with program staff members, and enrolling in a program before the eleventh grade are the three most influential factors for success. Supported by Webinar training and one-on-one technical assistance, OMG also enabled grantees to answer ongoing questions for themselves to improve their effectiveness.





COLLECTING EVIDENCE TO MAKE A CASE

Ways to Work, Inc., based in Milwaukee, provides low interest loans to working-poor families to purchase moderately priced used vehicles to improve their economic prospects. Since its start-up in 1984, Ways to Work, Inc. has provided \$4,000 loans to more than 23,000 families (a \$36 million total) in fifty locations throughout the U.S. Program leaders assumed the loans had impact on families, but they did not have clear, convincing evidence to support their assumption. Through administrative data analysis, site visit interviews, and in-depth participant phone surveys, OMG examined the program's impact on job advancement, child care, income, family well-being, change in education status, and credit rating. Findings revealed that nearly three out of four program participants reported higher net monthly income in the months and years after receiving their car loan. Ninety percent of the borrowers credited the car obtained through the loan with helping them maintain or improve their employment circumstances. OMG's findings substantiated the leaders' anecdotal knowledge about the program's success, allowing them to make a compelling case to current and potential funders and to influence public policy in support of car loans.



OMG helps clients
IDENTIFY THE
FACTORS and
characteristics likely
to lead to success,
ESTABLISH
INDICATORS AND
SYSTEMS to track
success, and
ANALYZE DATA to
gauge progress
toward success.

Understanding Systems for Policy Change

Once effective social innovations are successfully demonstrated, foundations and nonprofits increasingly turn to the public sector to sustain the innovations and bring them to scale. Effectively engaging the public sector's support entails building and aligning the policy-influencing capacities of diverse players, including many nonprofits that have never before worked as policy advocates. OMG understands the requirements of the policy change process. Once a policy goal is identified, leadership and collaborative skills are required to coordinate different organizational agendas, develop and mobilize networks, and to use strategic communications and program data for advocacy and case-making.

EVALUATING THE PROGRESS OF A FIELD-BUILDING PORTFOLIO

Launched in 2000, the **Ford Foundation's** new, six-year Electronic Media Policy Portfolio aims to build the organizational and collaborative infrastructure of this emerging policy-influencing field. Engaged as portfolio evaluators, OMG helped the program officer clarify her policy-building theory of change and documented how the field's infrastructure was firmly established and bolstered as a result of Ford Foundation support. The evaluation produced strong evidence of increased and more diverse leadership, organizational professionalization and effectiveness, strong new networks and collaborative alliances, and increased constituencies beyond the Beltway among national advocacy organizations, local grassroots activists, and knowledge builders.

DEVELOPING AND EVALUATING THE CAPACITY TO INFLUENCE POLICY

Aiming to build public will to make arts education central to quality education, the **Ford Foundation** selected nine sites across the country to participate in its multi-year initiative, Advancing the Arts in Education Reform. As evaluators, OMG worked with the foundation, technical assistants, and grantees to develop a theory of change to provide a framework for

gauging progress. Four broad capacity areas have been identified as critical to further this advocacy and policy-change agenda: grantee entrepreneurial leadership around policy; partnership development; advocacy and strategic communications; and the delivery of quality arts integration programs to serve as models. To date, findings suggest that indicators of success include having a clear policy goal, being strategic in selecting partners who can advance the policy goals on the ground as well as with influentials, and using data from demonstrations to advocate for arts education for all children.





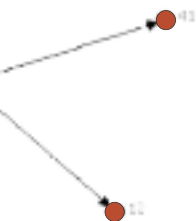
MAPPING NETWORKS TO EFFECTIVELY ORGANIZE FOR POLICY CHANGE

Over the past several years, the **Barr Foundation** has supported community-based network building to advance quality education in Boston. Their theory held that a network of advocates multiplies the capacity of individual grassroots leaders to influence education policy. Having established the Boston Parent Organizing Network — a network of parent organizations and external organizers — the foundation asked OMG to assess the network's current structure. Using social network analysis methodologies, OMG created network maps and shared them with network members. The maps revealed that a different network structure was needed to empower parents as more effective change agents. Specifically, OMG suggested that the external organizers delegate more responsibilities to the parents themselves, thereby placing the parents in a central network position. OMG also recommended leadership training to help parents learn how to maximize their personal and collective networks. OMG is starting a second phase of work in which parents and other network stakeholders will discuss how to continue to strengthen the network and revise the leadership curriculum. Following this, another snapshot will be taken to determine whether the revised network has become more effective.

EVALUATION PLANNING LAYS SOUND GROUNDWORK FOR A NATIONAL PROGRAM AND POLICY

An estimated 8.5 million families in America live in manufactured homes. Yet, those families who own their manufactured home rarely reap the asset-building benefits enjoyed by homeowners of traditional, site-built homes. Furthermore, low-income families who own manufactured homes frequently fall prey to predatory lending. **The Corporation for Enterprise Development's** (CFED) Innovations in Manufactured Homes Initiative (I'M HOME) seeks to address these inequities. The program has three inter-connected strategies: funding demonstration programs for new development and equitable financing; promoting public policy that supports the interests of manufactured homeowners; and strengthening the field. OMG developed an initiative-wide theory of change and a corresponding evaluation plan to help CFED develop a more targeted policy change strategy. The work also begins to track the impacts of its policy work and on-the-ground grantmaking to bring desirable manufactured housing opportunities to many more families across the country.

To sustain successful program demonstrations, foundations increasingly support POLICY CHANGE through coordinated agenda building with service and advocacy PARTNERSHIPS, COLLABORATIONS, and NETWORKS.



Charting Pathways to Organizational Effectiveness

Communities increasingly rely on the nonprofit sector to provide essential services and to advocate for public policy reforms. To help nonprofits meet these new community challenges, funders of nonprofits and nonprofits alike are investing in organizational capacity building. OMG assists nonprofits enhance their leadership, management, financial, technical, and collaborative skills through capacity building grantmaking, targeted technical assistance, and evaluation training.

PROVIDING EVALUATION TRAINING SO THAT HEALTH GRANTEES BECOME EFFECTIVE SELF EVALUATORS AND EVALUATION CONSUMERS

The **Robert Wood Johnson Foundation** recognizes that their grantees can benefit from learning how to be good consumers of evaluation services, and from having internal capacity for self evaluation. The foundation hired OMG to train several cohorts of their grantees in evaluation as well as theory of change and data collection and analysis. Emphasizing the integration of evaluative thinking in all aspects of organizational management, OMG is teaching the grantees how to ask good questions around mission, organizational and program assets and challenges, assumptions, goals, and impact.

EVALUATING THE GROWTH OF A NATIONAL COLLEGE ACCESS PROGRAM

The **Posse Foundation** operates a college access and success program in six cities through a dynamic recruitment, training, and support process. When the foundation received a three-year grant to expand its program to four new cities, strengthen current programming, and increase the number of college and university partners, they hired OMG to evaluate their capacity for expansion and to track progress. OMG is also examining how they maintain quality as they expand. OMG is developing theories of change and is assessing Posse's national and local organizational infrastructure as it expands.

MANAGING A FOUNDATION'S REGIONAL CAPACITY BUILDING GRANTMAKING PROGRAM IN HEALTH AND HUMAN SERVICES

For the **Pew Charitable Trusts'** Fund for Health and Human Services, OMG manages a capacity building program by selecting and monitoring financial awards for organizations seeking to address finance, technology, evaluation, professional development, and leadership transition concerns. Candidates for the program are drawn from among the foundation's grantees that work with children and youth, vulnerable adults, and the elderly. In addition to choosing and monitoring the awardees, OMG offers three workshops each year to help the awardees manage their capacity building projects for greater impact. Through capacity building, the nonprofit organizations are becoming stronger businesses and more robust and resilient organizations.



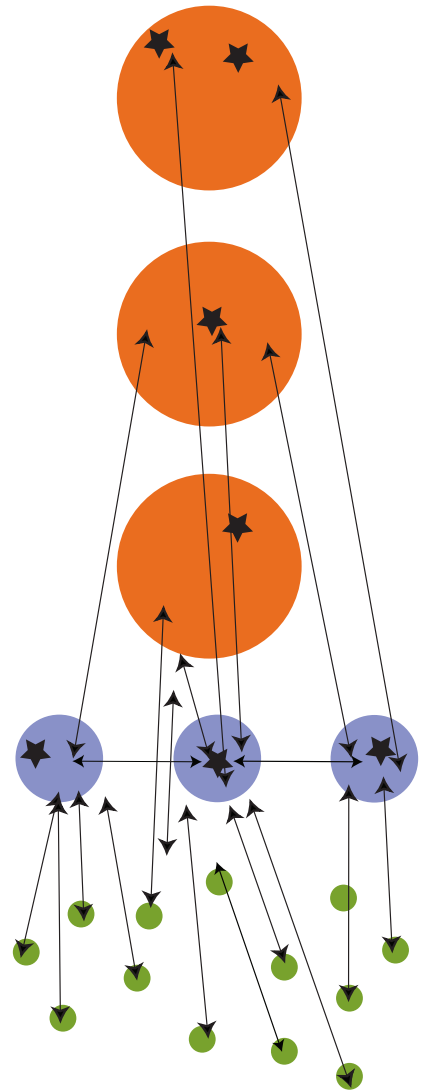
REDESIGNING A COMMUNITY FOUNDATION'S GRANTMAKING PROGRAM TO FOCUS ON STRENGTHENING THE LOCAL NONPROFIT SECTOR

The **Philadelphia Foundation** engaged OMG to collaborate in developing its new, foundation-wide grant-making approach in support of organizational effectiveness. OMG first did a national scan of other community foundations' capacity building grantmaking. Then, in close partnership with the foundation, OMG created a foundation-wide theory of change, designed a core operating program, detailed a strategy for awarding organizational effectiveness grants, and developed an evaluation system for the new grant program.

TRAINING AND SUPPORTING POST GRADUATES AND PROFESSIONALS TO INCREASE DIVERSITY WITHIN THE NATIONAL EVALUATION FIELD

Quality evaluation depends on having diverse perspectives since effectively interpreting public health, social service, community, and organizational social patterns depends on the authentic experiences of diverse team members. Despite this need, the evaluation field remains homogenous. The

Robert Wood Johnson Foundation is working in partnership with OMG and Duquesne University to diversify the evaluation field through a Robert Wood Johnson Foundation fellowship program for newly trained evaluators of color and from under-represented communities. Focusing on health and healthcare, this new fellowship program creates a continuum of evaluation professional development and supports opportunities for post-graduate fellows and practicing professionals interested in retooling their skills for evaluation.



OMG has a growing practice in EVALUATION TRAINING. OMG helps funders and nonprofits learn how to build EVALUATION SYSTEMS, and to use EVIDENCE-BASED THINKING for program development and improvements.

Learning through Reflective Practice

The OMG team views each consulting engagement as an opportunity to jointly advance professional learning. Using systems- and capacity-building frameworks, OMG helps clients learn how to learn from their successes and failures. Through honest one-on-one conversations, facilitated initiative-wide convenings, and field-level meetings, OMG helps philanthropies and nonprofits build effective organizational learning habits. OMG's approach allows its clients to successfully turn visionary theories of social change into powerful, practical solutions.

FUNDERS AND GRANTEES COLLABORATE TO FRAME A NEW STRATEGY

Along with wanting to know if their five-year grantmaking was advancing arts and education in the Pittsburgh region, **The Heinz Endowments** wanted to mobilize grantees and potential funders to support a more coordinated agenda. OMG began the evaluation work in the field, talking with grantees. Posing questions in a systems-oriented framework, OMG used the interview process to introduce a shared approach to the grantees' thinking about their own work. Stakeholders continued to build upon these ideas as OMG facilitated conversations about the research findings among both grantees and a group of potential funders. The research process, together with facilitated discussions, allowed the foundation to frame a new strategy and also begin to build the necessary broader support for this region-wide work.

LISTENING TO A COMMUNITY WHEN DEVELOPING AN INVESTMENT STRATEGY

Upon relocating from Shelton to New Haven, Connecticut, **Casey Family Services** (CFS) launched the New Haven Grantmaking Initiative. OMG was engaged to help the Casey team, a partnership between CFS and the Annie E. Casey Foundation, design their investment strategy while building from the successful work of other local funders and nonprofits. OMG listened to the community to identify issues and needs through community stakeholder interviews, a grantee survey, and extensive interviews with foundation and CFS staff. Using what was learned from the community engagement process, OMG worked with the foundation team to develop a strategy and action plan comprising direct services, targeted neighborhood development, community building activities, and civic investments.





OMG actively ENGAGES its clients as LEARNING PARTNERS. Working together to UNDERSTAND THE STRATEGY is as important as collecting, analyzing, and presenting the data.

SHARING SUCCESSES AND STRENGTHENING A NETWORK

The **Atlantic Philanthropies** funds nearly fifty direct service providers and children and youth policy and advocacy organizations. Their long-term goal is to secure substantial federal funding to improve the education, health, and economic well-being of children and youth. Similar to other systems-change investment strategies, Atlantic Philanthropies builds a peer learning network. Their intention is to help grantees more effectively work together to tackle large-scale policy needs, and also to help grantees develop children

and youth supports more holistically. For Atlantic Philanthropies' Disadvantaged Children and Youth Program grantees, OMG designed and facilitated a grantee convening to share the foundation's new directions, advance lessons about successful programs, and strengthen the network. The convening resulted in a coordinated grantee effort to strengthen the network as well as to continue to work together to create a shared policy agenda that considers the needs of the whole child.

Letter from the Director

As social change advisors to foundations and nonprofits, OMG looks to the past, and into the future, to improve the quality of community life. Indeed, much of our work is grounded on the shoulders of our predecessors and in the lessons of the past. However, with innovation as a hallmark, we continue to maintain a strong emphasis on learning with our clients about more effective social-change strategies across the systems in which change occurs: individual leaders, organizations, partnerships, coalitions, networks, movements, and public policies.

After twenty-five years, our work with our clients has moved beyond isolated projects and initiatives. We now explore significantly more sophisticated approaches that purposefully align players and policies. By informing strategy through evidence-based decision-making, increasing understanding about policy influencing systems, charting pathways to organizational effectiveness, and building learning organizations through reflective practice, OMG continues to contribute to the success of all those working to improve the quality of life of all people in all communities.

Prepared for the future, our organization is in the strongest and most robust position in our history. We have grown to have the largest, most talented and diverse staff ever. Most significantly, our recent emphasis on developing our internal project leaders has paid off. We now have considerable bench strength allowing us to increase in scale while also offering our clients a richer variety of backgrounds and content expertise among our staff. In the last several years, the OMG team expanded with several new academic and practice fellows and associates, as well as with interns from neighboring universities. We also added the new Robert Wood Johnson Evaluation Diversity Fellowship Program, run jointly by OMG and Duquesne University.

Financially, we are healthier than ever. Our assets have increased fourfold and our significant reserve is now used for staff development and other institution building needs such as executive coaching, technical training, and staff searches.

And finally, our networks of talented social change professionals doing and supporting exciting work across the country continues to grow exponentially from the Bay Area to Dallas, St Louis, Cleveland, Chattanooga, Baltimore, and right here in Philadelphia.

GERTRUDE J. SPILKA

As a CENTRAL TENET of our practice,
OMG teams use ORGANIZATIONAL
CAPACITY BUILDING to frame
our evaluations, research, and strategy
development.

For a comprehensive list of OMG project descriptions and staff profiles,
please visit the OMG website at www.omgcenter.org

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The mission of OMG Center for Collaborative Learning is to support solutions to the challenges facing neighborhoods, cities, and regional communities through applied research, evaluation, policy analysis, organizational development, and demonstration programs.

The Center works nationally with organizations, individually and collectively, in the nonprofit, philanthropic, and governmental sectors. We rely on a collaborative action research approach that builds new learning and problem solving capacities with our clients and that also contributes to the fields in which we work. Areas of established expertise include community and regional development, education, environmental quality, arts and culture, employment and training, human services, and children, youth, and families.

OMG