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Going Deeper: Can Investigative Reporters Add Value to Assessment and Evaluation?

Larry Meyer, M.P.A.

Every foundation takes its own unique approach to evaluation and assessment. Since its founding in 1950, the John S. and James L. Knight Foundation has been grounded in its founders' roots of newspaper journalism and communities, with a mission of informed, engaged communities. Many of its trustees, officers, and program staffers bring journalism experience to philanthropy, and the Knight Foundation's Web site says: "We define journalism excellence as the fair, accurate, contextual pursuit of truth."

It is no surprise, then, that when it comes to assessment and evaluation, the Knight Foundation has considered these intentionally provocative questions: Do we *really* know what happened in programs and initiatives? Are we sure we are getting straightforward, honest, easy-to-read, *useful* assessments from our evaluators?

The Knight Foundation's primary approach to assessment is headed by a director of strategic assessment and impact, responsible for leading the foundation's research and working closely with program teams and grantees to assess the impact and effectiveness of the foundation's work. But in a foundation with journalism at its core and a leadership team that values experimentation and risk taking, a notion began to take hold in 2006: Could largely independent journalists—investigative and explanatory practitioners—add value to the foundation's ongoing evaluation efforts? Would experienced reporters be able to sift

Key Points

- The John S. and James L. Knight Foundation supplemented its standard evaluation approach by engaging professional journalists to elaborate on evaluation findings.
- The resulting reports are more direct, even critical, than any prior Knight Foundation attempt to evaluate and assess.
- It produced deeper looks into the intent and outcome of major initiatives, analyzing and addressing flaws in the theories of change underlying initiatives.
- The goal of reaching external audiences was not achieved.

through all materials including scholarly evaluation reports and internal documentation, interview foundation program staff and grantees, and ultimately draw out something close to the truth? Would their resulting reports of up to 3,000 words be more likely to reach new audiences and influence decision makers? And, in the spirit of the foundation's commitment to lead journalism excellence in the digital age, could digital journalism developed in tandem with the investigators' work add value to their deeply researched, long-form assessments?

These developed into a collaborative course of action when the Knight Foundation launched the Reporter Analysis project, producing from 2006 to 2008 a series of five explanatory, in-depth, Web-based articles reported and written primar-

ily by working journalists who were experienced mainstream print reporters. Their work was paired with video stories, slide shows, and Web 2.0 activities developed by digital-age, multimedia producer/reporters. The resulting reports were printed and disseminated and are posted online.

The intent was to increase the value and reach of evaluation and its well-educated practitioners, whose reports, in the opinion of a majority of the foundation's executive committee and the project's creators, are too often ponderous and inconclusive. Moreover, they fear these reports are potentially biased favorably toward the grantee and the foundation, producing little real value to the foundation.

The Reporter Analysis series has (1) earned praise from Knight Foundation trustees, a key primary audience; (2) provided an accessible, visibly transparent way to show results and outcomes, warts and all; (3) remained current and credible through citations in mainstream media; (4) drawn wary concern from grantees; (5) received criticism from some community leaders; and (6) disappointed by failing to elicit online comments from foundation followers. The foundation paused the series in the midst of a strategic review in 2009 and is resuming it in 2010.

Background

Like most other major U.S. foundations, the Knight Foundation invests deep resources in evaluation, assessment, and dissemination. Since 1950 the foundation has funded in communities and in journalism; the founding Knight brothers

were twentieth-century newspaper entrepreneurs who used the technological advances of their day to build what became the newspaper company Knight Ridder. The foundation's signature journalism program focuses on leading journalism excellence in the digital age, and the Knight Foundation defines journalism excellence as the fair, accurate, contextual pursuit of truth. The foundation's communities program serves 26 U.S. communities where the brothers owned newspapers in their lifetimes. The foundation has a national program bringing the best resources to bear on community issues, and a transformation fund seeding innovative projects to the ultimate benefit of engaged, informed communities.

In 2006 the Knight Foundation's board of trustees, comprising media, business, community, and philanthropic leaders, sought to set aside time during their quarterly board meetings to review and discuss evaluation findings. Knight President and CEO Alberto Ibargüen, a former newspaper publisher, approved the idea of introducing explanatory journalists and their digital counterparts into the effort. The idea had been discussed internally for several years. A subset of the foundation's executive committee set out to develop the Reporter's Analysis series—the formal name given the journalism-flavored reports—as a way to brief trustees on evaluation work, generate board-level discussions, and go a layer deeper without losing the integrity of the evaluators' work.

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The Knight Foundation's (now former) vice president of communications and secretary (the author) worked with the vice president of strategic

initiatives and the former director of evaluation to develop the program.

We set out to commission top-notch explanatory journalists working under the direction of the vice president of communications/secretary to report and write clear, honest, factual, and transparent quarterly reports of 3,000 words. The foundation gave the reporters full access to grant development documents, grantee correspondence, and other internal records. The project director introduced the reporters to program directors, grantees, and evaluators and encouraged full cooperation with the reporting. The nicknamed “Scribe Reports” intended to answer one basic question: *What happened?* The resulting projects, paired with multimedia versions of the report, were printed internally for trustees and staff, posted publicly on the Knight Foundation’s Web site, and disseminated through the foundation’s main Web site, e-newsletter, and Knight Pulse, the foundation’s social networking site.

The resulting reports are more direct, even critical, than any prior Knight Foundation attempt to evaluate and assess. While trustees praised the results, the finished pieces are not without controversy or criticism, and the foundation has learned and adjusted to improve the usefulness of the reports.

The Context

The Knight Foundation is not alone in bringing a journalist’s ethic into play in organized philanthropy. A trend within philanthropy toward transparency, with potential regulatory changes in the air, has motivated organized philanthropy to be more open and communicative about its work. The Philanthropy Awareness Initiative (www.philanthropyawareness.org) is one effort funded by five U.S. foundations to increase awareness of philanthropy’s benefit among key influencers and stakeholders. The deficit of knowledge is staggering: 62 percent of influential Americans cannot name a foundation on their first try, according to PAI surveys. The Communications Network, a nonprofit membership group advancing the strategic practice of communication in the field (www.comnetwork.org), has seen its membership

grow from just below 100 to 350 in less than three years. Many of the professionals working on communications matters for foundations are former journalists or public affairs communicators.

In other areas of the nonprofit sector, investigative journalists are finding work. On National Public Radio’s *Weekend Edition* (Sunday, May 10, 2009, www.npr.org), reporter Steve Goldstein delved into the Arizona-based Goldwater Institute’s decision to hire an investigative journalist to probe government waste. In the May 11, 2009, Sunday *New York Times*, reporter Brian Stelter detailed what happened when Chevron hired a reporter to tell its side of a Ecuadorean pollution investigation ahead of *60 Minutes*. That said, both instances (one think tank, one corporation) cited here are materially different from the decision by the independent Knight Foundation to hire explanatory journalists and incorporate them into evaluation.

The Process

The veteran reporters—in one case, an experienced foundation communications officer with comparable attributes—were given full access to Knight Foundation evaluation/assessment reports, write-ups, and other internal documents, including grantee reports. They worked as independent contractors, receiving a flat fee of \$8,000 plus expenses: 50 percent up front upon initial agreement, 50 percent upon submission of final draft. They traveled, when necessary, to research and write the story, and conducted interviews with foundation and grantee participants. The topics were chosen on the basis of available evaluation, the importance and profile of the initiative, and the trends of programmatic funding interests, and were often recommended by the president and CEO.

The reporters (a.k.a. “scribes”) worked with the project editor (again, the Knight Foundation’s vice president of communications/secretary), the director of evaluation, and a multimedia team chosen by the project director throughout the development of the reporter analysis. They developed the list of interview subjects: grantees, stakeholders, foundation program staff, and

community or sector leaders. The foundation introduced the reporters to their subjects in advance of the interviews, explaining the purpose and requesting cooperation. The first draft of the written report was shared, prior to publication, with key interview subjects, including evaluators and grantees, for their information and for fact-checking. The reporter, in consultation with the project director, reserved the right to determine what would be published following the prepublication reviews. The written report was produced in time for a quarterly foundation board meeting, to be shared ahead of time in mailings to trustees. Reports and multimedia were posted online on the day of the foundation's board meetings.

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The Knight Foundation commissioned the works intent on producing reports on par with the best explanatory reporting in the United States and offered them to mainstream media for reprinting. That foundation had no knowledge of literature that described the process as it began, but it has since written an internal Wikipedia-style backgrounder explaining the project and the process for foundation staff.

The Inaugural Reporter Analysis

On July 23, 2006, the *Miami Herald* began "House of Lies," an ongoing series of investigative reports looking at corruption and abuse of power in Miami-Dade County's affordable housing industry. The series eventually looked at similar programs serving the city of Miami. The developing story had the potential to bring into its sphere the local funding strategy of the Knight Foundation, whose Miami program had invested more than \$19

million starting in 2000 in community development and social services for Overtown, the city's historically underinvested black downtown. Many of the organizations and nonprofits funded by the foundation in the process were community development corporations involved with public housing. As the stories grew in intensity, we at Knight asked ourselves: What is our track record, and do we know what the answers are if asked? The reality was: We did not fully know. Comprehensive evaluations of the Overtown grantees had been under way but were stalled. Lacking a comprehensive way to measure the impact and effectiveness of the investments, the Knight Foundation's program vice president at the time, Mike Maidenbergh, and Lorenzo Lebrija, a new Miami program officer, were tasked to review and assess the foundation's record. They put new energy into a report looking at some 32 different organizations, analyzing them through a number of common factors. The resulting report gave the foundation the background it needed to tell its own story.

The report also created the opportunity for transparency—for the foundation to share the results publicly as the documentary basis for the first Reporter Analysis. The project director reached out to a trusted colleague, Andre Oliver, an experienced public affairs communicator who had worked in politics, foundations, and national nonprofits. The Knight Foundation determined that Oliver's credibility, experience, and familiarity with the issues made him a suitable peer to the explanatory and investigative journalists who would follow,

His findings, beneath the headline *Miami's Investments in Overtown: A Big Bet, a Bigger Challenge*, were presented to trustees in September 2007 (<http://tinyurl.com/yjhudwk>). He found the following:

The foundation's \$19 million went to 32 national and community organizations to build affordable housing and promote community development; help train residents and find them jobs; increase personal savings; and assist with mentoring and with after-school and recreational activities.

Seven years later, nearly six out of 10 program managers told the foundation they met their goals, at least partially. Programs focused on employment and training, education, and recreation especially saw high levels of participation.

But other programs failed, or have yet to deliver on their promises. Efforts to promote micro-lending and encourage individual development accounts were not embraced by residents.

Ironically, where the foundation placed its largest bets—in community development—recipients faced the greatest hurdles and delivered the fewest returns. Although nearly 500 units of affordable housing were completed, rebuilt or refurbished using Knight Foundation funds, the total is well below aspirations.

The foundation's internal analysis of the grant portfolio paints a stark picture. Observers, Knight Foundation grantees, and foundation staff highlight significant problems with the strategy employed by the foundation, poor implementation by some grantees, and challenges inherent to Overtown.

Oliver's more than 3,000 word report was paired with a five-minute video produced by Miami's Common Machine Productions company. The video piece includes interviews with Lebrija and numerous grantees talking frankly about the hard lessons learned. The online package sought comments from viewers and readers; so far none have come forward.

A key finding was that the Knight Foundation forged what amounted to a shotgun wedding among three nonprofit partners with no track record of working together in Overtown. Grantees and foundation staff cooperated even in the face of what amounted to criticism of their decisions and theory of change assumptions. As an example, the head of the lead nonprofit grantee organizing the three-legged partnership also serves as the Knight Foundation's corporate counsel.

The Overtown Reporter Analysis gained new life in November 2009 when *Miami Herald* columnist

Jackie Bueno Sousa cited it when she wrote of continued setbacks in Overtown.

The Fund for Our Economic Future

The second analysis looked at one of the largest collaborative efforts in organized philanthropy—Northeast Ohio's Fund for Our Economic Future (FFEF). The nonprofit organization has nearly 90 foundation funders pooling resources to develop new jobs and new industries in economically distressed Northeast Ohio.

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Veteran *Miami Herald* business writer John Dorschner wrote *A Big Job: Retooling Northeast Ohio's Economy*, featuring a main piece and a series of separate sidebars. He drew on evaluation findings from Mt. Auburn Associates.

The Knight Foundation asked Dorschner to report on FFEF and come back with honest findings fully knowing the effort was chaired by the vice chairman of the foundation's board (now the foundation's chairman-elect). It would be a test of the foundation's resolve to produce transparent reports.

As it turned out, Dorschner's main conclusions were positive: There are early signs that the investments are paying off with new, clean tech-oriented jobs and industries. A key finding among the foundations that organized the FFEF effort was the realization they had failed to fund its communications and marketing efforts adequately in the early stages; subsequent funding cycles increased that commitment.

The multimedia piece was produced by Tu Multimedia of Chicago. The narrated video features

interviews with key participants and grantees and on-the-ground visuals of northeast Ohio's Rust Belt past and high-tech future (<http://tinyurl.com/5nfcvn>).

The American Dream Fund

The Knight Foundation wanted to know if local grants to immigrant-serving nonprofits in foundation communities had been distributed effectively by a national intermediary and used effectively to help new immigrants acquire their version of the American Dream. The foundation commissioned the piece amid the heated rhetoric of the national debate on immigration policy. The third reporter analysis became *Tempering the Immigration Debate: An Assessment of the American Dream Fund*.

The reporter was Juan Antonio Mecia, an assistant business editor at the *Charlotte Observer*. He delved into the work of Public Interests Projects (the national intermediary), reviewed the evaluation work of the Touchstone Center for Collaborative Inquiry, and wrote two descriptive sidebars looking in depth at the work of the Charlotte and Miami nonprofits awarded grants. Both sidebars looked at how immigrant-serving nonprofits working in Charlotte's growing Latino community and Miami's Haitian American community were using the small grants. A photo gallery by Charlotte's LOF Productions accompanies the report (<http://tinyurl.com/ye5mkcz>).

Biloxi's Post-Katrina efforts

Immediately after Hurricane Katrina devastated the Mississippi Gulf Coast (days before New Orleans' levees were to fail) in August 2005, the Knight Foundation pledged to help the coast's 11 ravaged communities with long-term recovery efforts. Subsequent funding efforts in the foundation community of Biloxi and its sister coastal towns focused on helping build back the overwhelmed nonprofit sector. In a piece by *Philadelphia Inquirer* political columnist and reporter Dick Polman, the foundation looked at the cumulative impact of its funding at the two-year mark, although no formal evaluation was yet available. The headline summarizes Polman's key finding: *Two Steps Forward, One Step Back*. Polman concluded that despite the tangible signs of recovery

and a focus on the future spurred in part by the Knight Foundation, the Mississippi Gulf Coast's recovery has been slow. A central theme throughout the report is the classic tension between locals and out-of-town experts in determining the long-term fate of the communities' rebuilding efforts (<http://tinyurl.com/yddd2hy>). The foundation's central grant recipient, Andres Duany—the principal planner of a series of long-term planning charrettes for the 11 coastal communities—took exception to Polman's characterizations and conclusions. The foundation reviewed the concerns with the reporter and stood by the story. After publication, the head of the Knight Foundation's local advisory committee, *Sun Herald* Publisher and President Ricky Mathews, shared a lengthy internal e-mail criticizing Polman's conclusions. In essence, Mathews said, they made the picture of the region's ongoing recovery appear too bleak.

Biloxi photographer Nicole LaCour Young provided a slideshow of photos documenting some of the recovery. For the first time in the series, the comment feature came into play, with three comments from local readers.

Living Cities

The final Reporter Analysis looked at Living Cities, the nearly two-decade effort of U.S. foundations and corporations to leverage funding into community development in 23 U.S. urban cities. The report (*Even as Living Cities Changes, America's Urban Neighborhoods Stay in View*, <http://tinyurl.com/yaqkb4k>) takes readers to Detroit amid the early signs of the drastic slump in real estate sales and visits the revised work of Living Cities grantees in the Twin Cities.

Reporter Marty Merzer, the recently retired senior writer at the *Miami Herald*, probed the intent of the vast funding collaborative, assessed the evaluated results and described the strategic evolution of the organization. Tu Multimedia returned with a profile of Living Cities work in the Twin Cities.

High School Journalism Initiative

The foundation initiated work on a sixth Reporter Analysis looking at its many investments to

support and sustain high school journalism. The project director, with support of program heads, contracted with a former national education reporter with wire service experience and asked her to begin work on the report.

The work began as the Knight Foundation's journalism funding focus began to gel around investments in digital age journalism. In reviewing upcoming assignments with the project director, the foundation's president concluded that an assessment of high school journalism funding would not produce results relevant to or helpful to the new direction, and the report was terminated.

Conclusions

The Knight Foundation's experiment with the Reporter Analysis Series ran from 2006 to 2008. The foundation spent most of 2009 in a strategic planning review.

On balance, the series remained true to the founders' roots and journalism values. It did produce deeper, honest looks into the intent and outcome of major initiatives. It analyzed and addressed flaws in the theories of change underlying initiatives and introduced a new commitment to honesty. In the cases of the Overtown and post-Katrina reports, it addressed and analyzed failures and delays. The other three reports tended to confirm the initiatives' direction and concluded that the foundation and its grantees had largely succeeded to date in its efforts.

But the series has yet to reach important audiences. The Knight Foundation would have benefited from more planning up front on identifying and targeting its intended audiences. The foundation did receive welcome and encouraging comments from the foundation's trustee, who valued the detailed looks at long-running initiatives and the honesty of the reporting. Several trustees encouraged continuation of the series. But board-level discussions were brief, and the reports served as backgrounders rather than discussion generators.

External audiences remain an important, untapped audience. The foundation initially disseminated the reports on its Web site, with news

releases, and via the foundation's electronic newsletter. In each instance the outreach urged people to read the report, view the video (or photos), and leave a comment. But few if any viewers/readers stopped to leave comments. Other early Knight Foundation efforts to elicit comments on its multimedia stories suffered similar outcomes, and it suggests that (1) more consistent and constant outreach and marketing needs to follow each posting and (2) posting online comments is a relatively new habit yet to take hold, especially among older Web users. One recent blog post cites the Reporter Analysis series, but that citation comes three years after the initial posting.

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The project's planners were initially disappointed at the lack of social networking/Web 2.0 comments associated with the Reporter Analysis series. The Knight Foundation's subsequent work with its Knight Pulse site confirms that regular efforts to inform participants of the opportunity to engage, to comment, and to return are necessary and regular components for social networking success.

The recent citation of the series in the *Miami Herald* suggests the continued presence of the articles on the foundation's Web site have value, credibility, and shelf-life. The foundation's executive committee felt that the series needed wider dissemination to other important audiences,

including organized philanthropy's evaluation/assessment practitioners and affinity groups such as Grantmakers for Effective Organizations. Until these audiences know more about the Knight Foundation's series and its intent, it may continue to remain beneath the radar.

The series tested the relationship between the foundation and its grantees by introducing a new level of review and assessment after the fact. At the time the grants and initiatives were discussed and approved, the prospect of a reporter's investigation was not part of the equation, and grantees could legitimately question the fairness of such an addition. Grantees were uniformly gracious, if wary, of the experimental approach, and worked well with the reporters.

The Knight Foundation's Reporter Analysis Series began at a time of change within the foundation

—and exemplifies the kind of experimentation that leads to learning, refinement, and focus. The series parallels the journalism program's shift in programmatic direction—leadership in the digital age. It remains an available tool as the foundation concludes its comprehensive strategic plan review.

The series also holds promise as a model for integrating straightforward and up-to-date communications thinking and planning into program and assessment activities. As foundations continue to adapt to new realities and opportunities afforded by the digital revolution, such efforts as the Reporter Analysis Series show that there is room for experimentation.

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