Measuring the Impact of Age-Friendly Health Systems, Family Caregiving, and Serious Illness and End-of-Life Care Grantmaking Programs

Regina A. Shih, Esther M. Friedman, Malcolm V. Williams,

Rani E. Snyder, Grace Gahlon, JiHo Chang, Terry Fulmer

Regina A. Shih, Ph.D. is a Senior Policy Researcher at RAND. Correspondence concerning this article should be addressed to Regina A. Shih, RAND Corporation, 1200 S. Hayes St., Arlington, VA 22202 (email: rshih@rand.org)

Esther Friedman, Ph.D., M.A., M.A. is a Research Associate Professor at the University of Michigan; this work was completed when she was at RAND.

Malcolm V. Williams, Ph.D., M.P.P. is a Senior Policy Researcher at RAND.

Rani E. Snyder, M.P.A., is Vice President, Program at The John A. Hartford Foundation.

Grace Gahlon, B.A. is a Research Assistant at RAND.

JiHo Chang, M.P.H., M.H.A. is a Program Associate at The John A. Hartford Foundation.

Terry Fulmer, Ph.D., R.N., F.A.A.N., is the President of The John A. Hartford Foundation.

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ABSTRACT

U.S. foundations give nearly $76 billion to charitable organizations and causes each year. This level of activity translates into tremendous possibilities for impact. Measurement of impact can help foundations understand how they are moving the needle on issues and populations of importance to them. Philanthropic organizations that focus on older adult well-being are underrepresented compared to the size of the older adult population, and pivotal to supporting innovative and sustainable changes in public health, health care systems, and communities. For almost four decades, The John A. Hartford Foundation has been a leader in building expertise in aging and testing and replicating innovative approaches to improving care for older adults. Using the John A. Hartford Foundation's grant portfolios from 2015 to 2019 as an exemplary case, this paper summarizes a review of methods that grantmaking entities can use to measure impact. We outline the steps for foundations to assess impact over time not just for single projects, but across entire portfolios to improve the quality of care to older adults and their caregivers.

INTRODUCTION

U.S. foundations give nearly $76 billion to charitable organizations and causes each year. Charitable giving is expected to increase by more than 5% in 2021, which will exceed historical trends in annualized average amounts of charitable gifts (The Nonprofit Times, 2020). Foundations are increasingly taking on a self-mandate to measure their impact to understand how their grantmaking efforts move the needle on issues and populations of importance to them. Demonstrating impact can also justify investments, inform advocacy efforts for policies and programs, ensure accountability, and illuminate contributions for social good.

The population of older adults age 65 and older is expected to double from 2018 to 2040 and will represent nearly 22% of the U.S. population by 2040. Compared to younger cohorts, older adults incur the highest personal health care expenditures, experience the most transitions in care, and rely more heavily upon family caregivers (Lassman et al., May 2014; Machlin & Carper, June 2014; National Alliance for Caregiving, 2020). Philanthropic organizations that focus on older adult well-being provide a critical source of funding to address the growing population of older adults in the U.S., their unique health and long-term care needs, and frequent reliance on family caregivers who are not well integrated into systems of care. Despite the demographic shift in older adults, the percentage of philanthropic supports that goes to aging topics has remained static at only 2% for decades (Feather, 2015). Thus, philanthropies that do fund aging issues are pivotal to supporting innovative and sustainable changes in public health, health care systems, and social services for older adults.

The John A. Hartford Foundation (JAHF) has been a leader in building expertise in aging and health since 1982. JAHF funds projects under three primary program areas: creating Age-Friendly Health Systems, supporting Family Caregiving, and improving Serious Illness and End-of-Life Care. Projects fall into one or more program areas. While frameworks do exist to measure the impact of a single project, JAHF sought to understand methods to measure impact for an entire portfolio of grants. Using JAHF as a case study, we describe the methods used to identify metrics and outline steps that grantmakers like JAHF can use to measure the impact of grant portfolios.

METHODS

We employed three approaches to identify impact metrics: a review of publicly available documents on best measurement practices, key informant interviews, and a review of progress reports from JAHF grantees. For each of these approaches, we scraped data, identified themes, and categorized metrics into domains from the Reach, Effectiveness, Adoption, Implementation, and Maintenance (RE-AIM) framework. RE-AIM is used to guide evaluations of the efficacy and effectiveness of single projects (Glasgow et al., 2019). Through these approaches, we sought to answer the question: what are foundations' best practices for measuring impact across multiple grants?

Literature Review of Funding Organizations

Our literature review included search terms in the biomedical literature and health-focused foundations. We identified a list of U.S.-based foundations that focused on health, related entities such as the Center for Effective Philanthropy (CEP), Google Scholar, and PubMed. We entered search terms listed in Table 1 into each organization's website or citation database and searched for documents on impact. Our search resulted in 56 potentially relevant reports, memos, and strategy documents from the sixteen websites. We excluded reports that focused on evaluation of single grants and did not include either program area or project metrics. Relevant documents were then individually reviewed for potential impact assessment frameworks and impact metrics.

Key Informant Interviews

As a second approach, we interviewed 20 individuals representing 8 JAHF grantees and 12 organizations. Individuals were selected because of their familiarity with JAHF's mission and topics covered by one or more of the three portfolio areas. Four of the interviewees were both stakeholders and grantees. The semi-structured interviews posted questions about (a) whether grantees had a logic model, theory of change, or process and outcome measures to assess impact of their project; (b) challenges that JAHF faces in achieving the goals of a program area, from the perspective of other funders familiar with JAHF; and (c) to what extent interviewees believe that JAHF funding is responsible for driving changes. To identify themes from the interviews, we drew from the analytic tradition of grounded theory, to review transcripts and identify examples of text that suggested processes, actions, assumptions, and consequences. We also looked for metaphors, repetitions across informants, and shifts in content to indicate relevant themes (Strauss & Corbin, 1990). We then reviewed the transcripts to identify which themes recurred frequently enough to warrant coding and then summarized themes across interviews. All informants gave verbal consent to participate, confidentiality of responses and identities were explained, and the methods were approved by the institution's IRB.

JAHF Grantee Progress Report Reviews

The third approach involved a review of completed and ongoing projects funded by JAHF between 2015 and 2019. The goal of this review was to identify types of impact reported in progress reports to determine whether reported metrics of impact can be streamlined into a more manageable set of impact metrics to be used across a program area. Impact metrics were categorized across the RE-AIM categories and tagged with the program area topic.

RESULTS

Frameworks to Support Impact Measurement

Several documents that we reviewed described frameworks for project evaluations using methods such as logic models or to assess a single project's impact on broader social change (Committee, 2013; Bill & Melinda Gates, 2010; NIEHS, 2012; MHEF, 2019). A logic model facilitates the visualization of relationships between the core components of a project and communicates how a project is expected to achieve change. However, it is difficult to identify metrics of impact across multiple grantees using a logic model alone. Our literature review found that grantmaking organizations did not typically report on frameworks for program area-level impact. However, a few exceptions emerged in which foundations focused on quantitative metrics, on comparative approaches, and on a theory of change model for program impact.

Quantitative vs Qualitative Metrics of Impact

The William & Flora Hewlett Foundation notes that they rely on aggregate data across grantees to track metrics such as the percentage of grants that are for projects versus general operating support, the diversity of target audiences, demographics of staff, organization type, and cultural relevance (Bruederle, 2018). The foundation regularly reviews aggregate data to track the percentage of grants that are for projects versus general operating support, and demographic characteristics across a strategic portfolio to assist in planning purposes. Progress towards the Foundation's Outcome-focused philanthropy approach necessitates "strategy refresh evaluations" to allow for course corrections towards their desired outcomes. The CEP Indicators of Effectiveness Report (Zezza & Cozine, 2018) describes The New York State Health Foundation's (NYSHealth) approach to developing metrics for grant performance and how to scale up these metrics to measure foundation-level impact using a scorecard. The NYSHealth scorecard numerically tracks key indicators of impact identified by the foundation to assess performance related to program area impact, customer service, reputational capital, and organizational capital. The scorecard was ultimately determined to be too restrictive and a decision was made to incorporate a more narrative and qualitative "progress report" component which would better allow for an understanding of the foundation's work and discussion on how efforts contributed to the foundation's most critical stakeholders. Both CEP and NYSHealth (CEP, 2002) suggest that qualitative assessments by the board, CEO, and program staff are important parts of program area impact evaluation. As the Bill and Melinda Gates Foundation underscores (BMGF, 2018), metrics should include both qualitative and quantitative metrics to measure the success of program areas.

In the case of JAHF, analyses from the key informant interviews also suggested qualitative metrics are key. First, the program areas often aim to influence larger society level problems (e.g. access to high-quality care), but the Foundation is not the only organization working in that space. It can be difficult to disentangle a program area's impact as identified by a quantitative analysis from other non-JAHF inputs, so qualitative work is necessary to help tell the story of what the Foundation accomplished. Second, it's very difficult to set up an experimental approach to assessing impact without a counterfactual to compare impact with and without JAHF funding. Third, the timing of impact is also hard to measure, especially when projects vary in duration across a program area. Qualitative analyses can help to explicate the impact of the program over long periods of time. Scherer (2016) conducted interviews with private foundation CEOs and program officers in Pennsylvania's Allegheny County and found that the outcomes of strategic initiative-types of grants may be more uncertain than other types of grants such as capacity-building grants. Thus, the complexity of grants within a portfolio and certainly across an entire foundation implies that a uniform approach to evaluating each grant may be too constrained. Objective measures may be harder to capture for certain types of grants such as strategic initiative grant. Thus, one qualitative metric of impact is whether the strategic-initiative project attracts other funding.

Other qualitative measures may include the impact of non-financial contributions to grantee capacity and success. Qualitative grantee assessments of awarded projects as well as applicants denied – can provide information on foundation-grantee relationships and the comfort grantees have with program officers. Without a strong relationship between the grantee and the foundation, the full impact potential of grants may not be realized. Similarly, interviewees suggested that many of JAHF's grants are related to systems change and aim to have a wider impact than changes in specific health care processes. Qualitative assessments of stakeholder engagement are therefore important to capture milestones such as creating consensus, developing change agents, seeding a movement through the partnership with stakeholders. Because of this critical aspect of JAHF's grants, we adapted the RE-AIM framework to include Stakeholder Engagement (StREAIM).

Comparative Approaches

The CEP describes a comparative approach to assessing foundation-level impact. This entails reviewing grantmaking characteristics from a relevant cohort of peers and comparing success to that of other similar grantmakers. Comparative data from peer foundations provide more context into how the individual foundation is actually performing, relative to their peer foundations. A disadvantage to this approach is that it requires coordination and/or cooperation among funders working on the same issues, which is not always feasible. The Bill and Melinda Gates Foundation's "A Guide to Actionable Measurement," notes that results achieved based on a foundation's strategy arise from collaborative efforts which subvert the need to measure attribution of strategy-level results to a single foundation's efforts. Measuring impact for a higher-level strategic initiative acknowledges the cooperative endeavors required for positive change in a collective way. Moreover, comparative evaluations don't necessarily address whether the foundation has had the intended impact, nor do they assess impacts to grantees as individual investigators.

Since attribution of impact is difficult to achieve, most funders choose alternative approaches that do not necessarily strive to attribute change to a project or program area. CEP suggests that the ideal metric would be a ratio of resources invested to social benefit achieved, as it directly measures program area success net costs. The limitations to such a metric are that it is difficult to quantify the denominator (social benefit) and this benefit may not appear for years to come. Some foundations developed approaches for measuring social benefits. As described in the Robert Wood Johnson Foundation's Impact Capital Measurement Report (Tuan, 2011), the Annie E. Casey Foundation uses project-related investments, mission-related deposits, and mission-related investments to support communities with disadvantaged children and families. They are interested in impact on two levels: population-level impact and grant-specific impact. External partners and other programs within the foundation are responsible for measuring population-level impact such as reductions in the incidence of asthma attacks.

Theory of Change

The concept of a theory of change to measure pathways towards change is not new. Yet, the application of a theory of change to assess program-level impacts is not a universal approach for foundations. There are a few notable exceptions. The Rockefeller Brothers Fund uses a program framework summary as its theory of change (Campbell et al., 2013). This framework summary identifies program guidelines, program's goals, and strategies, and indicators of progress. The Fund defines indicators of progress as the desired changes in understanding, behavior, capacity, public engagement, and public policy over a 3- to 5- year horizon.

To evaluate the Grantmakers in Aging's (GIA) EngAGEment Initiative (GIA, 2014) to expand philanthropic investments in aging, Annie E. Casey Foundation's Theory of Change Model (Reisman et al., 2004) was applied to assess the extent to which the program achieved its outcomes. The three components to this evaluation were (1) achieving impact by measuring changes that can be documented on both the individual and the population level; (2) increasing influence by assessing the extent to which EngAGEment projects sparked change in institutions, partnerships, and visibility of aging issues; and (3) leveraging funding of the program to influence changes in other public or private funders' investment strategies.

In summary, we uncovered general methods and theoretical frameworks for program-level impact assessments. The grantmakers' own assessments of these frameworks suggests three themes: First, scorecards or lists of quantitative metrics alone are insufficient for capturing the breadth of program impact; therefore, foundations should seek qualitative or anecdotal evidence of impact through interviews, surveys, and observation, including intended or unintended consequences, in addition to the more easily trackable quantitative metrics. Second, in addition to more traditional measures of impact, key informant interviews also pointed to the importance of partnership and stakeholder engagement. Finally, to go beyond single-grant and even program-level impact to assess foundation-level impact on social and policy change requires a theory of change to guide the identification of metrics. Comparative or attribution approaches could prove beneficial only if that is part of a foundation's theory of change and if a foundation coordinates with other funders to gather consistent data on impacts to facilitate analysis of impacts relative to other funders in the same topical space.

Metrics to Measure Impact

Through our literature review, we identified several grantmaking entities that provided specific metrics to measure impact. In Table 2, we summarize the impact metrics extracted from those grantmaking organization's strategy documents. These ranged from extent of stakeholder engagement to number of citations of policy changes. Many grantmakers were interested in tracking impacts to grantees in terms of funding growth, relationship with the grantmaker, and to other organizations working towards the same mission. The Rockefeller Brothers Fund in particular notes that indicators are measured across a variety of sources such as "grantee narratives and case studies, surveys and public opinion polls, records of policies enacted, media coverage, and the general course of events." The Fund acknowledges that progress indicators are not intended to be an exhaustive list of all the desired changes they expect to see in their fields of work. The programmatic assessment of grantees by internal program staff occurs every 3-5 to years whereas their impact assessment of strategy effectiveness is conducted over 5 to 15 years and conducted by external evaluators.

RECOMMENDATIONS

Given our findings above, we offer the following process for foundations to assess impact at a program-area level:

1) Develop either a theory of change or framework for measuring impact at the program area level;
2) Provide guidance to grantees on how the foundation developed its a logic model/framework for measuring impact and project monitoring;
3) Select metrics that align with each of the goals in the foundation's theory of change; and
4) Develop data systems for tracking impact over time.

Step 1: Develop a Theory of Change or Framework

A theory of change is a useful framework to assess impact of multiple grantees. A theory of change (see Figure 1 for a template) is a framework for organizations to define the components required to bring about change towards a goal or vision (Clark, 2004). While a theory of change is analogous to logic models, theory of change models require the assertion of assumptions, acknowledgement of larger contextual factors, and involvement with a wider array of stakeholders that shape how a foundation can achieve their end-goals. As Dr. Laura Leviton from the Robert Wood Johnson Foundation notes (Leviton, 2018), logic models utilize indicators that are temporally closer to decision points whereas indicators in a theory of change include trends that drive change over multiple time points. The comprehensive assertion of assumptions, contexts, and stakeholders are less relevant at a single project level; thus, logic models are better suited for single projects, and a theory of change is better suited to measure impact at the portfolio level.

Step 2: Provide Guidance to Grantees on Logic Models

Once foundation program staff have specified a theory of change for their program area(s), logic models can be tailored by grantees to indicate the expected change for their particular project and for project monitoring. This is important to ensure alignment between project level goals and a foundation's theory of change. A logic model depicts the logical flow of input (resources) to actions (activities) to outputs and outcomes. Logic models can be used in both outcome and process evaluations. Outcome evaluations measure the actual changes stemming from a program's activities. Process evaluations are distinguishable from outcome evaluations in that process evaluations assess *how* a program is being implemented, rather than the effects and effectiveness of a program (NYSHF, undated). Logic models should address one or more of the short-, intermediate-, or long-term goals specified in a foundation's theory of change. Thus, the achievement of the outcome(s) specified in a grantee's logic model is one way to measure progress towards the theory of change goals.

Step 3: Select Metrics That Align With Goals

In order to measure progress towards the goals in a theory of change for a program area, we categorized metrics that we found in our reviews of progress reports, key informant interviews, and literature review using the StREAIM framework. These metrics are summarized in Table 3 and can be collected using surveys with scales or via key informant interviews. As such, they can be collected using a mix of qualitative and quantitative approaches. While these metrics are tailored for JAHF, a subset of metrics can be selected to be broadly applicable to other foundations interested in older adult well-being as long as they align with a foundation's theory of change.

To operationalize these metrics using an example, suppose that a measurable impact under section D of Figure 1 is to achieve "Increased awareness of need for age-friendly care by health care organizations, health plans, and policymakers. A "Reach" metric would be most appropriate to assess progress towards this goal. One such metric from Table 3 could be "Awareness of an issue, message, social movement, intervention, program, or policy by providers, health/long-term care systems, and policymakers." This could be measured in a few ways such as an annual survey of representative samples of each of these three groups, internet search trend data for "age-friendly care" as key words, or a grey literature search of policies, documents, to identify partners that may be using age-friendly principles.

Step 4: Develop Data Systems for Tracking Impact

There are several options of data analytic platforms to operationalize measure and track metrics objectively. Grants management platforms (e.g., Salesforce) could potentially incorporate technical components of proposals and progress reports into grants management program. Building in natural language processing and applying it to text in proposals, progress reports, and key informant interviews could ease the burden on program staff. Other data visualization tools include simple tools like Microsoft Excel, or a qualitative analysis software program such as MaxQda that can analyze, combine, and visualize qualitative and quantitative content. Table 4 illustrates one simple example to track impact across programs over time. This quantitative approach counts the number of grants that mention a StREAIM metric (chosen to align with a theory of change) across a program area, relative to the denominator of total grants. Green shaded bars indicate the extent to which the percent of grants in each program area include at least one impact metric within each StREAIM dimension. Light green bars indicate that less than a third of grants in the program area include impact metrics in this dimension. The medium green shading indicates that between 1/3 and 2/3 of grants in the program area include impact metrics in this dimension. Dark green shading indicates that more than 2/3 of grants in the program area include impact metrics in this dimension. An all-white bar indicates that none of the grants in the program area include impact metrics in this dimension. Tracking how these shaded bars change over time indicates progress towards the program area's goals.

CONCLUSION

There is growing interest in demonstrating impact within the philanthropic community and by grantees. If the appropriate metrics are chosen to align with a well-defined theory of change for a program area, impact can be accelerated and demonstrated with more transparency. Our methods applied to JAHF's three program areas identified a framework of assessment focused on stakeholder engagement, reach, effectiveness, impact, and maintenance metrics, that, if tracked over time, can show progress towards improving older adult quality of care and well-being.

The full potential of our approach should be considered in light of a few considerations. First, grantees could vary substantially in their ability to conduct evaluations. Any added burden on foundation staff or grantees to conduct an evaluation may require increased resources from a foundation. Second, if foundation priorities shift substantially, an entire measurement approach could be uprooted. Third, data may not be available to measure all aspects of a foundation's program area and tracking impact over lengthy time periods is challenging because of changing contexts. Additionally, once the funding period is over, funders are not able to reliably obtain progress or evaluation information from grantees and must rely upon publicly available data or field new data collection efforts to assess metrics. Evaluations such as these may be too complicated for smaller foundations or those with limited staff.

In conclusion, the complex needs of older adults and the care systems they and their family caregivers interact with necessitates ambitious, multi-faceted initiatives. Foundations are rising to this occasion and the diverse set of projects within a program can make program-level impact assessments challenging. Balancing the foundation's resources and staff time required to track a core set of metrics over time while remaining agile enough to accommodate evolving funding priorities is critical to demonstrating positive impacts to the populations they serve.

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