



Oak Foundation

Problem

The Oak Foundation sought to evaluate the performance of its marine-related grantmaking since its founding. Oak's portfolio included more than 55 grants and 40 grantees spanning much of the globe. The foundation has pursued a variety of grantmaking approaches and focused on several locations, including support for marine protected areas in Belize, fisheries reform in the Bering Strait, and fisheries policy reform in Brussels. Oak wanted to know which grant approaches had been most effective, which geographic areas had benefited most from its support, and how it should focus their grantmaking in the future.

Solution

CEA worked with Oak to systematically evaluate their grant portfolio. The evaluation included:

- A series of structured conversations with key foundation staff to understand their grantmaking objectives and to develop a set of “first principles” —overall guidelines which govern the foundation’s grant strategy
- An overall evaluation of grantee and portfolio performance—this was based on the degree to which transformation of specific marine-related issues had occurred as a result of the grant, at a scale and cost acceptable to the foundation
- A survey to collect qualitative and quantitative information from grantees
- In-depth case studies of several grantees, including an analysis of their accomplishments to date, collaboration with other partners, and potential leverage of other projects in their region
- Development of alternative grantmaking strategies, including potential grant programs, tactics, expected outcomes, and program selection criteria

Results

The project culminated in recommendations for how Oak could further concentrate its grantmaking geographically and be more effective. The foundation has since scaled down its opportunistic approach and is focusing on several highly leveraged geographic areas and programs.