



TRANSFORMING FUNDER & EVALUATOR RELATIONSHIPS

FUNDER & EVALUATOR AFFINITY NETWORK

SESSION 1

OUR FACILITATORS

Engage R + D



Pilar Mendoza
Senior Consultant
Engage R+D

Equal Measure



Carise Mitch
Senior Communications Consultant,
Equal Measure

TODAY'S SESSION



Overview of the Funder & Evaluator Affinity Network



Lightning Round Presentations (x3)



Small Breakout Group Discussions (x3)



Closing & Next Steps



SHARED GOALS OF FEAN

- Bring together funders and evaluators to reflect on the current state of evaluation in philanthropy
- Identify key opportunities and challenges in the field
- Work individually and collectively toward solutions that advance shared capacity on the part of evaluators working with, and within, philanthropy

<https://fdnweb.org/fean/>

WHAT'S NEXT

- Join us on for our next webinar on 7/15
- Continue to promote Call to Action resources
- Culminating blog post on FEAN's accomplishments and what's needed now

OUR SPONSORS

GORDON AND BETTY
MOORE
FOUNDATION

 The
California
Endowment

 EWING MARION
KAUFFMAN
FOUNDATION

 WILLIAM + FLORA
Hewlett Foundation

 The **James Irvine**
Foundation

the David &
Lucile **Packard**
FOUNDATION

 **FORD**
FOUNDATION

 California
Health Care
Foundation

WALTON FAMILY
FOUNDATION


MacArthur
Foundation

OUR PRESENTERS

Knowledge Sharing



Janet Camarena
Senior Director of
Candid Learning,
Candid



Karuna Chibber
Evaluation and
Learning Officer,
David and Lucile
Packard Foundation

Global Transformation



Heather Britt
Principal Research
Scientist,
NORC at the
University of
Chicago

Collaboration & Partnership



Yvonne Belanger
Director of Learning
& Evaluation,
Barr Foundation



Rachel Mosher-Williams
Founder &
Principal,
RMW Consulting
Group, LLC



KNOWLEDGE SHARING

Knowledge Sharing is a Mission Imperative: Why We Cannot Afford to Keep Evaluation Findings to Ourselves and How We Can Do Better

Janet Camarena, Senior Director of Candid Learning, Candid
Karuna Chibber, Evaluation and Learning Officer, The David & Lucile Packard Foundation

ISSUE

As a sector, we are reticent to share lessons from our work—authentically, transparently, and in partnership with the nonprofits and communities we support.

This reticence undermines our collective ability to do the very thing we are charged to do: improve practice and advance the public good.

SOLUTION

OUR OPEN LETTER

As members of the Funder and Evaluator Affinity Network (FEAN), a national network of evaluation professionals composed of both foundation staff and consultants, we are committed to deepening the impact of evaluation and learning on philanthropic practice and the causes we serve. Through our work, we have identified a critical challenge in evaluation that urgently requires our joint attention.

As a sector, we are reticent to share lessons from our work—authentically, transparently, and in partnership with the nonprofits and communities we support. This reticence undermines our collective ability to do the very thing we are charged to do: improve practice and advance the public good.

As we write this in 2020, our sector is being tested like never before; we are responding to unanticipated global health and economic crises, while examining the roles we play in magnifying or mitigating long-standing racial injustices. Access to reliable field knowledge is critical to ensuring that our responses are informed rather than impulsive, inclusive rather than exclusionary, and effective rather than ephemeral. Now more than ever, we cannot afford to engage in funder-centric inquiry, requiring nonprofits and communities to supply information that has no clear benefit to them or to the field.

When we choose not to share what we are learning from evaluation, we are not only impeding the efficiency and effectiveness of the sector, but also falling short of our responsibility to the communities we serve. The scale and complexity of the problems we aim to solve require that we account for the results of our investments, build on each other's successes and failures, and learn from and with our partners on the ground. None of us can hope to advance change alone; only when we share knowledge can we shed enough light on the systems and structures we operate in to find our way forward.

Yet too often, we extract information from nonprofits and communities for evaluative purposes, only to keep the learning to ourselves, or perhaps share it with a few like-minded peers. This drains precious time and resources as we all struggle to find the information we need, creates unproductive echo chambers where ideas go unchallenged, and perpetuates the divide between knowledge haves and have-nots, curtailing learning and advancement among those closest to the work. We practice evaluation precisely because we believe that knowledge is a form of power. And in a sector designed to serve the public good, we affirm that knowledge should be treated as a public asset, so that what you know doesn't depend on who you know.

	<i>Decision Points</i>	<i>Tips to Get Started</i>
Content	What do we need to learn? What do our partners and the field need to learn?	For example: Can we fill a knowledge gap, deepen existing knowledge, bring diverse perspectives to a known agenda or solution?
Audience	Who would benefit from this learning?	Think broadly and inclusively. For example: program participants, community members, practitioners, grantees, other nonprofits, foundation staff, other funders, government officials, advocates, academics, consultants, other evaluators.
Goal	How do we hope our audiences will use the content? What decision points or action steps will it inform?	Consider all dimensions of change—mindsets, behaviors, organizational practices, policies, etc.
Timing	When do our audiences need to have access to the content for it to be relevant and useful?	Don't wait until you have all the answers or a perfectly polished product to share. Identify the critical window of opportunity for advancing your goals.
Product	Based on what we know about our audiences and the contexts in which they work, what product formats would support our goals?	Think outside the technical report. For example: infographics, briefs, slide decks, videos, peer-reviewed articles, raw data, experiential learning opportunities, oral stories, images, interactive resources.
Vehicle	What are the best channels for reaching our audiences? What are the best ways to amplify our messages?	For example: open repositories, websites, conferences, webinars, blogs, convenings, journals. For example: social media, email blasts, traditional media.
Messenger	Who are the most credible and connected messengers who can lead our audiences to the products?	Consider that the most trusted messenger may not be the foundation or the evaluator.

4 STRATEGIES

- **Make a commitment:** Sign the open letter
- **Open up!** Adopt new policies, use repositories, open standards and digital object identifiers
- **Start with a reflection:** Use our discussion guide as a tool
- **Build dissemination into your plan:** with our dissemination planning tool as a guide.

OPEN UP!

- Adopting **open knowledge** and **open licensing** policies
- Use **open repositories** for storing knowledge products
- Use **open standards** and **digital object identifiers** for knowledge on your website

OPEN UP! CASE STUDY: S.D. BECHTEL, JR. FOUNDATION

SPENDING DOWN? DON'T FORGET YOUR KNOWLEDGE!

(GlassPockets, January 14, 2020)

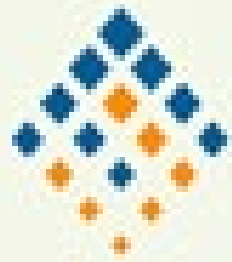


Ashleigh Halverstadt, the former senior evaluation and learning officer of the S. D. Bechtel, Jr. Foundation, a spend-down foundation that concluded operations in December 2020, shares tips about what she would have done differently earlier on to more easily be able to share the foundation's knowledge.

As our sunset approached, we wondered: What would come of the knowledge we'd produced and supported? During the spend down, we invested more than \$80 million in research and evaluation related to our strategic initiatives, and we published a few dozen resources of our own. We worked hard to share knowledge through our website and email distribution, and, more importantly, through our partners. But we knew our website wouldn't live forever (it is currently expected to remain live for at least one-year post-sunset) and that we wouldn't be around to support the ongoing knowledge dissemination efforts of our partners.

After much consideration, we decided against establishing a formal, comprehensive archive of all our records (read more about that here). We felt a responsibility, however, to create a permanent, publicly accessible home for our knowledge products—and that led us to IssueLab. IssueLab is one of the social sector's largest open repositories, which already makes it a sensible place to store things. Plus, when a resource is added to IssueLab, it also gets disseminated through knowledge aggregators such as WorldCat (the world's largest library catalog) as well as other Candid properties and partners. When we learned that Candid was launching the Legacy Collection service, specifically designed for organizations that are closing their doors, we knew it was a good fit.

- **Relying on institutional memory is not a scalable method.** Collect grantee knowledge products through your grants portal or tag knowledge-building grants in your database for easy searchability later.
- **Traditional copyrights create more work** because you must seek permission to share every knowledge product. Adopt open licensing so you can easily share grantee knowledge.
- Even if you don't think you are using traditional copyright, **original work is automatically protected by copyright** if you don't implement open access policies.
- DOIs or digital object identifiers are very important for limited life foundations because **DOIs provide an unbreakable link to knowledge products.**



GRANTCRAFT

a service of Foundation Center

OPEN FOR GOOD
KNOWLEDGE SHARING TO
STRENGTHEN GRANTMAKING

DISCUSSION GUIDE: A SET OF REFLECTION QUESTIONS

Domains

Areas of Inquiry

Clarifying purpose, values, and expectations

- Stakeholders
- Access and use
- Unique information needs
- Others who could benefit
- Values related to sharing
- Alignment of expectations

Anticipating and addressing challenges

- Risks and inadvertent harms
- Risk mitigation
- Handling of negative findings

Designing and funding the work

- Representative design/methods
- Engagement in sensemaking
- Capacity & resources

DISSEMINATION PLANNING TOOL

	<i>Decision Points</i>	<i>Tips to Get Started</i>
Content	What do we need to learn? What do our partners and the field need to learn?	For example: Can we fill a knowledge gap, deepen existing knowledge, bring diverse perspectives to a known agenda or solution?
Audience	Who would benefit from this learning?	Think broadly and inclusively. For example: program participants, community members, practitioners, grantees, other nonprofits, foundation staff, other funders, government officials, advocates, academics, consultants, other evaluators.
Goal	How do we hope our audiences will use the content? What decision points or action steps will it inform?	Consider all dimensions of change—mindsets, behaviors, organizational practices, policies, etc.
Timing	When do our audiences need to have access to the content for it to be relevant and useful?	Don't wait until you have all the answers or a perfectly polished product to share. Identify the critical window of opportunity for advancing your goals.
Product	Based on what we know about our audiences and the contexts in which they work, what product formats would support our goals?	Think outside the technical report. For example: infographics, briefs, slide decks, videos, peer-reviewed articles, raw data, experiential learning opportunities, oral stories, images, interactive resources.
Vehicle	What are the best channels for reaching our audiences? What are the best ways to amplify our messages?	For example: open repositories, websites, conferences, webinars, blogs, convenings, journals. For example: social media, email blasts, traditional media.
Messenger	Who are the most credible and connected messengers who can lead our audiences to the products?	Consider that the most trusted messenger may not be the foundation or the evaluator.

CALL TO ACTION: SIGN FEAN'S OPEN LETTER

If you share our conviction that we can have a greater impact in the sector when we are able to better access and leverage the lessons of our colleagues, then please consider taking a first step with us!

To join us in this growing effort, select at least one action from the list above to commit to, share this invitation with others in your network, and use the "sign on" form below to add your name to this movement. We can become more impactful if we treat knowledge sharing as a mission imperative, collectively shifting professional norms, step by step, practice by practice, for the benefit of us all.

In affinity,

- **Janet Camarena**
Director, Candid Learning
Candid
Action Team Facilitator
- **Ashleigh Halverstadt**
Senior Evaluation and Learning Officer
S. D. Bechtel, Jr. Foundation
Action Team Facilitator
- **Kimberlin Butler**
Director of Foundation Engagement
Mathematica
Open Letter Coordinator
- **Gabriela Fitz**
Principal, Research Lead
Think Twice LLC
Open Letter Coordinator
- **Karuna S. Chibber, DrPH**
Project Director/Senior Evaluator
John Snow Inc.
Discussion Guide Coordinator
- **Yvonne Belanger**
Director of Learning & Evaluation
Barr Foundation
- **Lori Nascimento**
Senior Learning and Evaluation Manager
The California Endowment
- **Rachele Espiritu**
Founding Partner
Change Matrix
- **Sandra Silva**
Change Specialist
Change Matrix
- **Alisha Rios**
Founder
Coactive Change
- **Clare Nolan**
Co-Founder
Engage R1D
- **Sonia Taddy-Sandino**
Co-Founder
Engage R1D
- **Meg Long**

- President
Equal Measure
- **Bess Rothenberg**
Senior Director, Strategy and Learning
Ford Foundation
- **Halle Preskill**
Managing Director
FSG
- **Lindsay Hanson**
Principal
Grassroots Solutions
- **Christina Kuo**
Senior Strategist
Grassroots Solutions
- **Kendall Guthrie**
Knowledge-sharing
- Co-Founder
Engage R1D
- **Sonia Taddy Sandino**
Co-Founder
Engage R1D
- **Meg Long**

- Evaluation Officer
William and Flora Hewlett Foundation
- **Matthew Carr**
Strategy, Learning & Evaluation Director
Watson Family Foundation

Download a copy of the letter, which includes a discussion guide and planning tool designed to help you kick off every evaluation effort with the right set of questions to plan for effectively sharing what you learn as a result of your work.

DOWNLOAD

Use of this content is permitted under the [Creative Commons BY 4.0 license](#).

SIGN THE LETTER

First Name *	Last Name *	* Indicates required
Organization *	Title	
Email *		

By submitting this form, you are signing this letter and affirming that your organization will adopt at least one of these practices. Given the policy aspect of some of these practices, we encourage engagement with executive/ team/director level colleagues, but in the spirit of FEAN's values around inclusivity, anyone is welcome to sign on to this call to action.

SIGN THE LETTER

Download a copy of the letter, which includes a discussion guide.

WHERE YOU CAN FIND US

Knowledge Sharing is a Mission Imperative: Why We Cannot Afford to Keep Evaluation Findings to Ourselves and How We Can Do Better

<https://fdnweb.org/fean/call-to-action/knowledge-sharing/>

FEAN Website:

<https://fdnweb.org/fean/>



DISCUSSION QUESTIONS

- Which of the strategies feels most relevant for your work and why?
- How might we use these strategies to advance equity?
- What strategies have worked for you to overcome barriers to knowledge sharing?



GLOBAL TRANSFORMATION

Advancing Global Evaluation Practice to Meet the World's Challenges: A Call to Action and Reflection

Heather Britt, Principal Research Scientist, NORC at the University of Chicago

ISSUE

As philanthropy takes on a larger role in global development, foundations and evaluators can make significant contributions to global transformation as allies with people across the globe whose lives are most closely impacted by pressing challenges.

GLOBAL TRANSFORMATION

The Sustainable Development Goals (SDGs) provide a blueprint for a better and more sustainable future for all

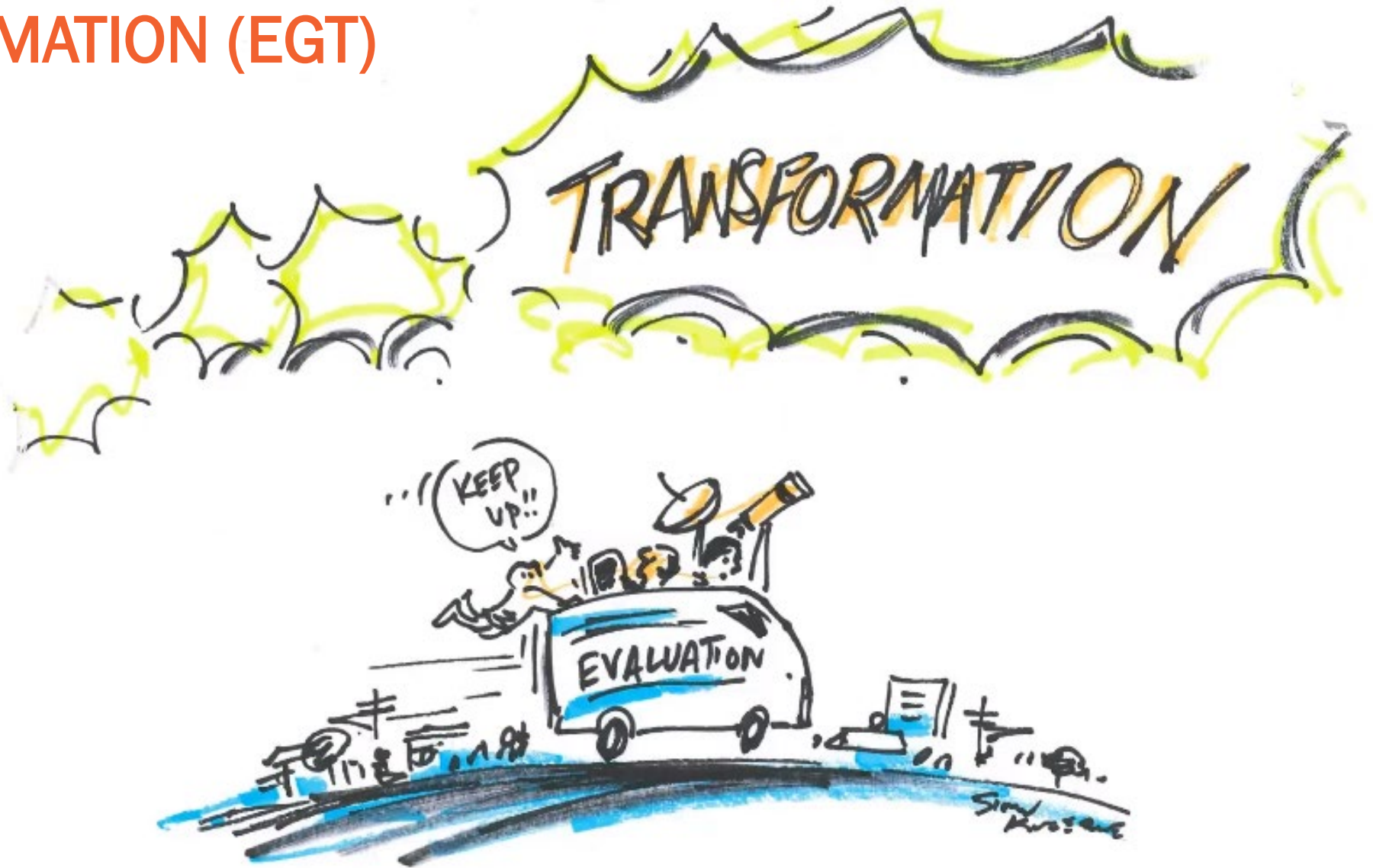


SOLUTION

This brief identifies ways that foundations and evaluators can transform the practice of evaluation to better serve global transformation, and harness philanthropy's unique position to nurture and grow a robust, inclusive Evaluation for Global Transformation (EGT) ecosystem.



EVALUATION FOR GLOBAL TRANSFORMATION (EGT)



5 STRATEGIES

- **Reimagine** evaluation's contribution to global transformation.
- **Build** capacity in an EGT ecosystem.
- **Expand** EGT ecosystem membership and ensure equity.
- **Develop** a shared learning agenda for EGT.
- **Fund** the shared EGT learning agenda.

WHERE YOU CAN FIND US

*Advancing Global Evaluation Practice to Meet
the World's Challenges: A Call to Action
and Reflection*

<https://fdnweb.org/fean/call-to-action/global-transformation/>

FEAN Website:

<https://fdnweb.org/fean/>



DISCUSSION QUESTIONS

- Which of the strategies feels most relevant for your work and why?
- How might we use these strategies to advance equity?
- What strategies have worked for you to advance evaluation for global transformation?



COLLABORATION & PARTNERSHIP

Better together: How Evaluator Collaborations Can Strengthen Philanthropy and Increase Collective Knowledge

Yvonne Belanger, Director of Learning and Evaluation, Barr Foundation

Rachel Mosher-Williams, Founder and Principal, RMW Consulting Group LLC

ISSUE

Logistical and relational barriers impede collaboration and knowledge-sharing that could advance the collective capacity of the field, and in turn, inhibiting diversity and quality of learning.

Mindsets and behaviors on the part of both funders and evaluators make partnerships difficult and create barriers to equity and philanthropic impact.

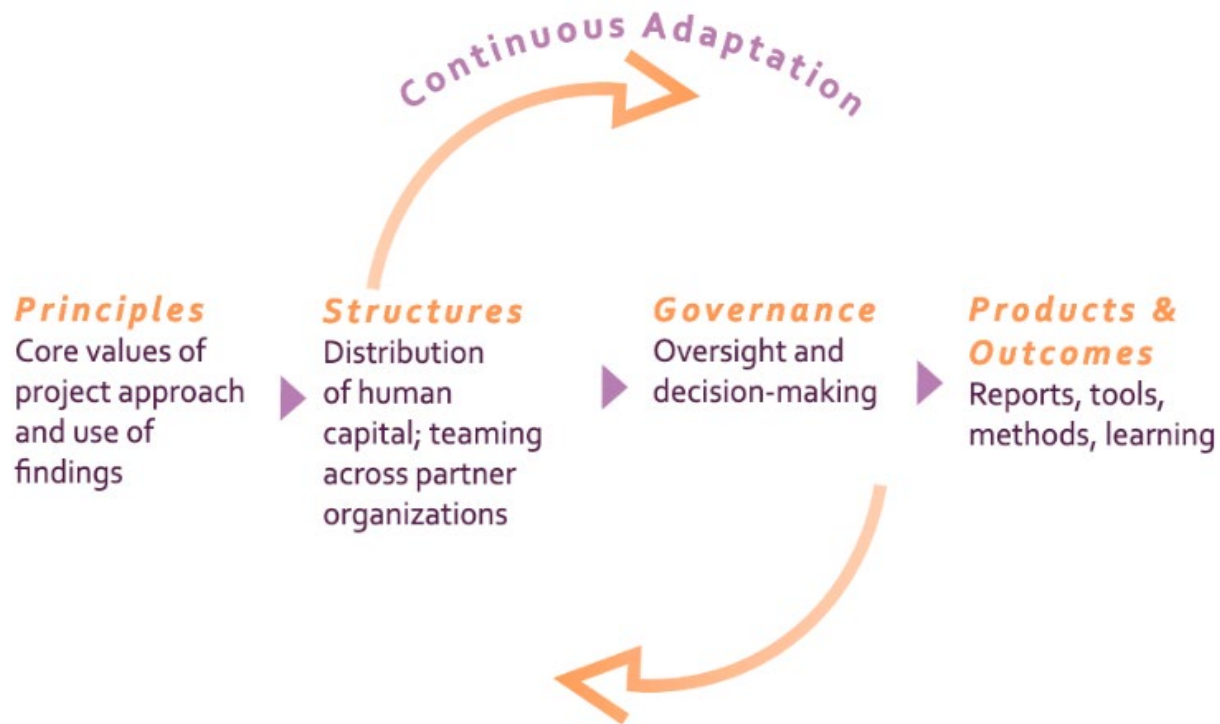
SOLUTION

- Partnerships can build capacity in the field and advance diversity, equity, and inclusion.
- Funders and evaluators need to shift practices and develop the will to create a warmer climate for partnerships.
- This guide outlines promising practices for both evaluation firms and funders that support better partnerships, along with field-level recommendations.

4 STRATEGIES

- **Engage** earlier and in lower-stakes settings
- **Rethink** the economics
- **Review** equity implications of practices
- **Invest** in networks

Major Dimensions of Evaluator Partnerships



Key Decisions Along the Way

Before

- How will partners be selected and contracted?
- Are we culturally and operationally aligned?
- What distinct or overlapping roles and responsibilities do we have?
- How will oversight and governance be structured? How will we share power?
- What methods will we use and who will own Intellectual Property (IP) if applicable?

During

- How will we manage internal or external complexity?
- How will we pivot with resource allocation or data collection/analysis methods if changes are required?
- How will we take advantage of mid-evaluation opportunities for program changes or learning?
- What do we do if the quality of work is insufficient?

At Close

- With whom will we share findings and with what degree of transparency?
- How will the work be credited and recognized externally?
- If follow up work is needed, who gets the contract?
- How will opportunities for thought leadership and field building resulting from work be resourced, staffed, and managed?

WHERE YOU CAN FIND US

*Better together: How Evaluator Collaborations
Can Strengthen Philanthropy and
Increase Collective Knowledge*

<https://fdnweb.org/fean/call-to-action/collaboration-and-partnership/>

FEAN Website:

<https://fdnweb.org/fean/>



DISCUSSION QUESTIONS

- What strategies have you used to strengthen partnerships?
- How have partnerships advanced equity and increased the impact of your organization's work?



THANK YOU!

Questions? Contact FEAN at:

FEAN@equalmeasure.org

<https://fdnweb.org/fean/>