

FEAN Call to Action Series:  
**Knowledge Sharing**

# **Knowledge Sharing is a Mission Imperative:**

Why We Cannot Afford to Keep Evaluation Findings to Ourselves  
and How We Can Do Better

**Knowledge Sharing Action Team**

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# About FEAN

The Funder & Evaluator Affinity Network (FEAN) is a collective effort to transform how funders and evaluators collaborate, with the goal of deepening the impact of evaluation and learning on philanthropic practice, to advance more equitable and sustainable outcomes. FEAN brings together funders and evaluators to review the current state of evaluation in philanthropy, identify key opportunities and challenges facing the field, and work toward solutions that advance shared capacity both individually and collectively. FEAN's field-shifting strategy is [grounded in a set of shared values](#) among funders and evaluators: inclusion, the need to create space for new and different influencers, collaboration over competition, and optimism. Founded in June 2017, FEAN now has more than 330 members.

## Our Funders

Gordon and Betty Moore Foundation  
The California Endowment  
The California Health Care Foundation  
The Ewing Marion Kauffman Foundation  
The David and Lucile Packard Foundation  
The Ford Foundation  
The William and Flora Hewlett Foundation  
The Minnesota Community Foundation Donor Advised Fund  
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# About FEAN's Call to Action Series

In the fall of 2019, five Action Teams made up of volunteers from FEAN's membership, assembled to develop actionable recommendations or tools in five practice areas: **Strategy & Practice, Evaluators of Color, Knowledge Sharing, Global Challenges, and Collaboration & Partnership**. The practice areas were collaboratively selected by FEAN members as areas most urgently in need of change. Over the course of 2019 and 2020, the five teams met and collaborated to develop five products that provide actionable guidance for funders, evaluators, and others in the philanthropic ecosystem in order to achieve a stronger and more equitable field of practice. The five products of the Call to Action Series are:

- **Good Intentions Are Not Enough:** Making Evaluations More Useful for Foundation Strategy and Practice
- **Evaluation is So White:** Systemic Wrongs Reinforced by Common Practices and How to Start Righting Them
- **Knowledge Sharing is a Mission Imperative:** Why We Cannot Afford to Keep Evaluation Findings to Ourselves and How We Can Do Better
- **Advancing Evaluation Practice to Meet Global Challenges:** A Call to Action and Reflection
- **Better Together:** How Evaluator Collaborations Can Strengthen Philanthropy and Increase Collective Knowledge

# Knowledge Sharing is a Mission Imperative: Our Call to Action

As members of the Funder & Evaluator Affinity Network, 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 not only impede the efficiency and effectiveness of the sector, but also fall 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.

**We recognize that improving how we share evaluation lessons will require shifts in how we work, both as foundation and evaluation professionals. In this call to action, we invite you to join us in making knowledge sharing a mission imperative.**

Foundation leaders say that transparency among funders about what is and isn't working—evaluative knowledge—[could significantly increase programmatic effectiveness](#); but ironically, this is also the information they are least likely to share. In fact, only [14% of foundation evaluation staff](#) consider external dissemination of evaluation findings to be a top priority.

What is holding foundations and evaluators back? Grantmakers commonly cite several barriers to knowledge sharing, which relate to both the capacity and the culture of philanthropic organizations:

- We are too busy.
- We don't want to put grantees or the strategy at risk.
- We are reluctant to share unfavorable findings, which could be perceived as failure.
- We are uncertain about the quality and/or relevance of evaluation findings.
- We question whether the knowledge is useful, timely, or broadly applicable "enough" to share.

Although these concerns are legitimate, they do not outweigh the clear benefits of knowledge sharing, or the risks of not sharing. These barriers can be overcome if we choose to make sharing a priority.

If you have a stake in philanthropic evaluation and an interest in advancing knowledge sharing, **we urge you to join the movement by adopting at least one of the following practices and signing this public call to action.** We are all in different stages of our knowledge sharing journeys. Find an entry point that works for you, and together, we can make knowledge sharing a common practice.

Put processes in place to make knowledge sharing the default:

- **Create an [open knowledge policy](#) articulating how you will share materials that are funded or produced by your organization.** Having a blanket open knowledge policy saves time by eliminating the need to craft and review a new policy for each evaluation. Share it on your website and with current and prospective grantees, evaluation, and funding partners.
- **Adopt an approach to intellectual property that enables knowledge to be shared and used,** such as an [open licensing policy](#) that allows others to distribute, adapt, and build on your material. Include this intellectual property policy in grant and contract agreements.
- **Ask grantees, evaluation, and funding partners to deposit knowledge products in open repositories** such as [IssueLab](#), [Open Educational Resources](#), and [Open Health Data](#), so the resources can be widely accessed by anyone, not just by visitors to your organization's website.

- Use [open standards](#) and [digital object identifiers](#) for knowledge materials on your website, so they can be easily discovered and tracked. Learn more knowledge sharing processes from Candid’s [Open for Good](#) GrantCraft Guide.

Establish norms that maximize the value of knowledge sharing, while minimizing real and perceived risk:

- **Build an expectation of knowledge sharing into evaluation projects from the start, including a plan for packaging findings in an accessible, useful way and disseminating them internally and externally.** This will save time and effort trying to negotiate an approach to sharing later. Below you will find a set of discussion questions and a dissemination planning tool to help jumpstart the process.
- **Build extra time and resources into evaluation and grantee engagements to support knowledge sharing.** Make time to engage grantees in developing evaluation questions, methods, and products that will serve their learning needs. This will enable stakeholders to share ownership of the knowledge building process—and derive greater value from it.
- **Identify, assess, and address repercussions of knowledge sharing at the start of the project and at every dissemination opportunity, grounding decision-making in the “first, do no harm” principle.** Seek opportunities to use knowledge sharing as a tool to advance your mission, but be cautious and make exceptions for dissemination efforts that pose a real risk to grantees and partners.
- **Don’t be a gatekeeper or let perfect be the enemy of the good.** Be completely transparent about how evaluation findings were reached and what their limitations are, and then let readers decide for themselves whether the findings are valid, what they mean, and how to use them.
- **Continue to work on your internal knowledge sharing practice.** Cultivating a learning culture is not easy, but you can begin by setting up knowledge exchange sessions with your colleagues. If thoughtfully framed within an “amnesty” context, internal learning sessions can build your organization’s knowledge sharing muscle, creating space to explore and apply lessons learned with minimal risk.

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 go to the [FEAN website](#) to see the full list of signers and to [add your name to the 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.

# Knowledge Sharing is a Mission Imperative: A Discussion Guide for Funders and Evaluators

In philanthropy, we know we need to learn from one another to advance our goals, yet we hesitate to disseminate lessons from our work. We understand that knowledge is a form of power, yet we often keep it to ourselves, empowering our own institutions but not our partners. These habits undermine our collective ability to do the very thing we are charged to do: improve practice and advance the public good.

Improving how we share evaluation lessons will require both foundation and evaluation professionals to develop new capacities and embed new norms and practices in the way we work. To help jumpstart the necessary shifts in our work, we offer a set of reflection questions for funders and evaluators to consider together, at the start of every evaluation and learning engagement, to ensure that the knowledge we build is shared. The dissemination planning tool that follows these questions can help move the conversation from reflection to action.

## Clarifying purpose, values, and expectations

- What is the purpose of the evaluation? Who has had a voice in shaping the goals and defining success?
- What values do we hold related to sharing the findings (e.g., transparency, learning, equity, participant ownership), and how do we intend to uphold them?
- Who will access and use the findings? What information do they need, and how will they use it? Who else could benefit from access to the learning that we might not be thinking of?
- How can we ensure that all stakeholders are aligned in their expectations of the evaluation's purpose, values, and knowledge sharing goals?

## Anticipating and addressing challenges

- What risks or harmful consequences might sharing the evaluation findings cause for the individuals or organizations involved, including funders, evaluators, grantee partners, constituents, or the strategy/change effort itself? What can we do to mitigate these risks upfront?
- Let's imagine the evaluation findings are negative. Will we share them? What can we do to ensure that negative findings will not be used punitively, but to support improvement?
- To what extent will the evaluation examine any policy and advocacy work? What can we do to ensure that the findings will not create a legal liability for the funder or the implementing partners?

- Who will have intellectual property rights to the data and findings? How can we ensure that those most affected by the results have shared ownership? What open licensing options do we have?
- What are the implications of our knowledge sharing goals for consent and confidentiality agreements? What steps can we take now to ensure that all stakeholder interests are protected?

### **Designing and funding the work**

- How can we design the evaluation to ensure that the findings will be valid and relevant across cultures, representative of all voices, and well contextualized?
- What findings do we expect could be shared, with whom, and when? What product formats, dissemination approaches, and messengers would make the findings useful and accessible?
- Who will be involved in vetting and making sense of the findings, framing key messages, and deciding what to share? How can we shift power to those most affected by the results?
- What capacities will we need to reach our knowledge sharing goals, and how can we develop or access them? Does the evaluation plan and budget include sufficient time and resources?
- How can we support the knowledge sharing capacity of grantee partners and on-the-ground stakeholders? Do grants include sufficient time and resources to support their involvement?



# Dissemination Planning Tool

Knowledge shared is only as good as knowledge “taken up.” In addition to the reflection questions above, we highly recommend developing a thoughtful dissemination strategy to maximize uptake of knowledge. The following prompts can be used to identify the content you hope to generate and share through an evaluation, who you intend to share the learning with and why, and the product formats, dissemination approaches, and messengers that would help you reach your goals.

	<i>Decision Points</i>	<i>Tips to Get Started</i>
<b>Content</b>	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?
<b>Audience</b>	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.
<b>Goal</b>	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.
<b>Timing</b>	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.
<b>Product</b>	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.
<b>Vehicle</b>	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.
<b>Messenger</b>	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.

# Learn More

## The State of Practice

[Benchmarking Foundation Evaluation Practices 2020](#)

Center for Evaluation Innovation, 2020

[Understanding & Sharing What Works: The State of Foundation Practice](#)

The Center for Effective Philanthropy, 2018

[Sharing What Matters: Foundation Transparency](#)

The Center for Effective Philanthropy, 2016

## Open Knowledge Practices

[Open for Good: Knowledge Sharing to Strengthen Grantmaking](#)

Candid, 2018

[Grey Matter\(s\): Embracing the Publisher Within](#)

Lisa Brooks and Gabriela Fitz, The Foundation Review, 2015

[Open Knowledge for the Social Sector](#)

Candid

[Hewlett Foundation Open Licensing Toolkit](#)

The William and Flora Hewlett Foundation, 2016

[Open Licensing Resources for Foundations](#)

Creative Commons

[Evaluation Report Guidance](#)

Ewing Marion Kauffman Foundation

[Reimagining Measurement: A better future for monitoring, evaluation, and learning](#)

Monitor Institute, 2017

## Sample Open Knowledge Principles and Policies

[Guiding principles: Openness, transparency, and learning](#) / [Evaluation Principles and Practices](#)

The William and Flora Hewlett Foundation

[Policy for Open Access](#) / [Policy for Data Archiving](#)

Robert Wood Johnson Foundation

[Guidelines for Investments in Research](#)

Arnold Ventures

[Information Sharing Approach](#) / [Global Access Statement](#) / [Open Access Policy](#)

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# Acknowledgements

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