

# The Foundation Review

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Volume 11  
Issue 1 *Foundation Learning - Open Access*

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3-2019

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### Recommended Citation

Nolan, C., Long, M., & Perez, D. J. (2019). Evaluators as Conduits and Supports for Foundation Learning. *The Foundation Review*, 11(1). <https://doi.org/10.9707/1944-5660.1456>

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# Evaluators as Conduits and Supports for Foundation Learning

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**Keywords:** Learning, philanthropy, evaluation, consultants, knowledge

## Introduction

As stakeholders in the social sector, evaluation and philanthropic professionals care deeply about impact. We are driven to move the proverbial needle in ways that will improve individual and community outcomes in the fields where we work: education, health, community development, the environment, civic society. As such, we think deeply and continuously about how to improve the likelihood of impact. Learning and evaluation — the “R&D” of the social sector — are critical functions to help us do so, supporting innovation, adaptation, and continuous improvement processes that help us get closer to the changes we seek.

For over a decade, these critical functions of learning and evaluation in philanthropy have been evolving rapidly, becoming more essential to supporting decision-making and strategy. These shifts come in part because the adaptive nature of philanthropic investments has required foundations to position within and continuously adapt to shifting contexts, as noted by Patrizi, Heid Thompson, Coffman, and Beer (2013) in *Eyes Wide Open: Learning as Strategy Under Conditions of Complexity and Uncertainty*. Foundations continue to place greater emphasis on achieving measurable results while tackling increasingly more complex work, such as movement-building and systems change.

While the types of philanthropic investments, and therefore learning and evaluation needs, have evolved, we also know that demand for evaluation and learning functions has grown within philanthropy. A study from the Center for Effective Philanthropy and the Center for Evaluation Innovation (Coffman & Buteau, 2016)

## Key Points

- Evaluators play a critical role in supporting philanthropic learning, programming, and strategy, but evaluation and learning in philanthropy is often limited in ways that impede deeper resonance and impact.
- Most philanthropic evaluation is focused on the needs of individual foundations, knowledge sharing with the broader field is limited, and foundations struggle to integrate evaluation and learning as a management tool. This article makes the case that evaluators and funders can do more to build the collective capacity of evaluators working in philanthropy in order to enhance their contributions to community change.
- This article also examines the ways that evaluation in philanthropy is evolving, lays out root causes of its limitations, and looks at emerging tools, techniques, and lessons that showcase new ways evaluators and funders are working together to strengthen practice.

elevated the growth and diversity of the evaluation and learning functions in philanthropy, noting that while demand for these has increased over 10 years, evaluation staffing and internal philanthropic resources have not kept pace.

As a response to the increasing prevalence and demand for evaluation and learning, the growing complexity of philanthropic investments, and foundations’ internal capacity constraints, evaluation professionals working with and within philanthropy are experiencing a time of rapid evolution that has challenged them to develop

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not only more appropriate analytical frames and methods, but also new skills and approaches that go well beyond evaluating discrete programs or serving an accountability function. Increasingly, evaluators are being called upon for strategic-planning efforts, group facilitation processes, constituent engagement, communications support, capacity building, and other skills and learning-supportive activities that foundation clients require (Coffman, 2016).

Within this context, external evaluation professionals have come to play an important role in supporting foundation learning, offsetting the requests for internal philanthropic evaluation and learning functions and seeking to help meet those multiple demands. External evaluators can supply essential learning supports, including articulating hypotheses, theories, and logic models that inform strategy; gathering information from grantees and community members; synthesizing information across multiple data sources to help assess progress and impact; and facilitating conversations with staff, trustees, grantees, communities, and other evaluation stakeholders to apply what has been learned (Raynor, Blanchard, & Spence, 2015). Despite these and

other functions external evaluators may play in philanthropy, there are still concerns about the usefulness and influence of evaluation. The study by Coffman and Buteau (2016) highlighted a number of challenges in philanthropic evaluation, including limitations in generating useful insights for the social sector, lessons for grantees, and action-oriented recommendations for foundation staff.

There are many stakeholders in the social sector impacted by the evolution of learning and evaluation in philanthropy, including individual evaluation professionals; small, medium, and large evaluation firms; foundation evaluation and program officers; foundation executives; non-profit and philanthropic infrastructure organizations (Foundation Center, 2018); and, of course, nonprofits seeking to integrate learning and evaluation into their own practice.

The authors of this article — leaders of two small to mid-size professional-services firms that offer philanthropic evaluation, and a long-time foundation evaluation and learning executive — began exploring these concerns about the utility and influence of philanthropic evaluation based on our own professional experiences. We opened the conversation to include other interested stakeholders, eventually forming a diverse network of professionals interested in addressing these concerns. This article seeks to summarize these discussions thus far. We begin with an overview of how the network of philanthropic evaluation members has evolved, provide a summary of what network members identify as key factors that impact the utility and influence of philanthropic evaluation, present some emerging actions to address these issues, and end with next steps for the network and an invitation.

### **Launch of the Funder and Evaluator Affinity Network**

With initial funding support from the Gordon and Betty Moore Foundation, we launched a dialogue to explore ways funders and evaluation professionals could work together to deepen the impact evaluation and learning has on philanthropic practice. Specifically, we sought to raise

this question: Are evaluators' roles proscribed in ways that inhibit broader social impact? Considered more broadly, how can small and mid-size evaluation firms and their philanthropic clients move from a contracting relationship to one where the partnership is a conduit for learning, and the evaluator is viewed as a critical actor in the social-sector ecosystem?

In June 2017, we convened a group of 27 leaders of small and mid-size evaluation firms and funders (primarily evaluation and learning officers) to discuss the state of evaluation and test the salience of some key issues proposed by Nolan and Long (2017). The first meeting, held alongside the Grantmakers for Effective Organizations (GEO) Learning Conference in Chicago, Illinois, affirmed the resonance of those issues among a diverse set of participants. It also underscored and elevated the need for funders and evaluators to work together in new ways to build the shared capacity of philanthropic evaluators — those within philanthropy as well as external consultants. Building this sort of shared capacity requires a shift in perspective; rather than viewing evaluators as mere contractors, funders recognize the crucial role evaluators can play in advancing knowledge about how to drive social change most effectively (Halverstadt, 2018).

Since the first convening, this informal network — the Funder and Evaluator Affinity Network (FEAN) — has grown to over 250 individuals and includes individual evaluators, larger firms, and foundation professionals with programmatic and other roles beyond evaluation and learning. Additional convenings were held at the annual American Evaluation Association (AEA) conferences in 2017 and 2018 and at the April 2018 conference of GEO. Each FEAN event was attended by 80 to 100 people, both new and returning participants. We have intentionally sought to raise broader awareness of this effort by providing updates on our work on blogs hosted by the Center for Effective Philanthropy (CEP), GEO, the Foundation Center, and AEA.

FEAN and related efforts are now being supported by multiple funders, including The

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California Endowment and the Ewing Marion Kauffman, David and Lucile Packard, Ford, California Health Care, William and Flora Hewlett, Walton Family, and MacArthur foundations. We are actively partnering with both the Center for Evaluation Innovation (CEI) and the Luminare Group, and will launch action teams this year to make further progress on issues raised through this effort.

### **Identifying Root Causes and Crowd-Sourcing Solutions**

As the network has grown and become more diverse, recent FEAN discussions have moved from contextual shifts in philanthropic evaluation to identifying the underlying inhibitors to stronger application and resonance of evaluation and learning in philanthropy. The assumption is that FEAN members can begin to act — formally and informally, individually and organizationally — to address the root causes of these barriers to greater influence and impact of philanthropic evaluation.

To gain a better understanding of existing efforts and to fuel more solution-oriented exchanges, Equal Measure and Engage R+D surveyed FEAN members in August 2018. The survey highlighted possible approaches for other FEAN members or interested evaluators or funders to address root causes of impediments to the influence of philanthropic evaluation, and sought to help organize

action teams to work together over the coming year to provide more examples, guidance, and resources for funders and evaluators within and beyond the network.

The web-based survey, which was shared with all FEAN members (207 individuals at the time), asked participants to identify the root causes they were working to address in their professional setting and describe how they and their organizations were addressing each of those root causes. Forty-two individuals responded to the survey, representing 20 percent of the network and a diverse cross-section of organizations, professional roles, and geography. The survey was not intended to be a robust study, but instead designed to surface emerging actions with respect to the root-cause challenges identified by the network; and it generated a wide range of initiatives and ideas to improve the practice of evaluation in philanthropy.

FEAN members elevated five root causes of impediments to stronger influence and impact of philanthropic evaluation. What follows is a discussion of each root cause, along with a summary of the open-ended survey responses to highlight emerging actions among FEAN members to address those causes.<sup>1</sup>

### *Root Cause No. 1: Limited Evaluator Professional Development Specific to Philanthropy*

The increased demand for evaluation overall and interest in different evaluation approaches requires evaluation professionals to have wide-ranging and diverse skill sets. Beyond classic social science research methods, these include working knowledge of and experience with technical assistance and capacity building, business strategy, communications, design thinking, return on investment, management consulting, organizational development, facilitation of learning, and community engagement. Being all things to all people may be one of the most

challenging expectations facing today's evaluation professionals.

As members noted, professional development rarely prepares evaluators to understand and work strategically within the philanthropic context. Many evaluators are trained in assessing the impact of nonprofit social programs, and may lack familiarity with methods to evaluate adaptive initiatives or investments designed to build systemic capacity. In addition, evaluators working with nonprofits or government agencies may lack understanding of foundation power dynamics, the limitations of grantmaking, and internal culture and norms that influence the uptake of findings.

Professional development in evaluation typically falls within three categories: academic training, field learning opportunities (e.g., conferences, in-person workshops, and online resources offered through professional associations, universities, and nonprofit intermediaries), and on-the-job learning. Academic training for evaluators often focuses on methodology divorced from the specific context of the work being evaluated. In addition, few field learning opportunities address the role of evaluation within philanthropy. As one survey respondent observed,

There does not appear to be a field of evaluation that trains and supports people working either within or outside of foundations on foundation strategy, place-based evaluation, and foundation's internal culture. ... If you put out an RFP for evaluation services as a funder, undoubtedly the majority of responses will be from those with no knowledge of how funders work.

To accelerate skill development while developing a deeper understanding of philanthropic culture and ways of working, most small and mid-size evaluation firms have adopted an apprenticeship model. On-the-job learning or apprenticeships can be effective methods for transferring critical knowledge and skills, but they require large

<sup>1</sup> Many of the issues identified by the network are also relevant for community-based, nonprofit, public, and private stakeholders working in the social sector. The focus of this effort, however, continues to be on funders and evaluators working in philanthropy; expanding the scope of this work would require additional resources and infrastructure to support a sectorwide conversation. It is also important to note that the list of these root causes and solutions is not exhaustive, but rather a reflection of where the energy of recent network discussion resides.

**TABLE 1** Efforts to Increase Evaluator Knowledge Specific to Philanthropy

Mechanism	Sample Efforts
<i>Professional networking tailored to evaluators working with funders</i>	The Center for Evaluation Innovation (CEI), a nonprofit whose aim is to push philanthropic and evaluation practice in new directions and arenas, has played a leading role in supporting the development of foundation evaluation and learning capacity. CEI directs the Evaluation Roundtable, a network of foundation leaders seeking to improve how they learn about the impact of their work. Center Director Julia Coffman reported that CEI “is experimenting with cross-fertilizing the Evaluation Roundtable network with evaluation consultants working in philanthropy. We want to create better alignment among evaluation consultants and foundation evaluation leaders about what constitutes high-value evaluative work and how both roles can better support it.” CEI convened the Evaluation Roundtable network and evaluation consultants in spring 2019 and used lessons from that convening to inform future efforts.
<i>Funder-supported peer-to-peer learning</i>	The David and Lucile Packard Foundation regularly brings together its monitoring, evaluation, and learning partners across programs to engage in peer learning and professional development. Its most recent convening involved optional training in facilitation methods in addition to peer-to-peer learning opportunities.  The National Committee for Responsive Philanthropy (NCRP) is sponsoring an advisory and peer-learning group for consultants engaged in applying <i>Power Moves</i> , an assessment toolkit focused on equity and justice, in their own practices. Participants share their learnings and insights with one another and the NCRP. While participating consultants span a range of service areas, evaluation consultants are represented in the initial cohort.
<i>Internal training and mentoring for evaluators</i>	Athena Bertolino of Ross Strategic noted that her firm “has been making a concerted effort internally to get more staff connected with philanthropic evaluation work and to provide more opportunities for staff to attend relevant conferences and participate in field-building discussions.”  Corey Newhouse of Public Profit noted that in addition to providing staff with an annual budget to support outside professional development, her firm “hosts regular practice-shares among team members to share new frameworks, strategies, or methods.”  Doug Easterling of the Wake Forest School of Medicine has hired, oriented, and mentored master’s-level researchers on foundation-sponsored projects in addition to advising faculty colleagues on how to work effectively with foundations.

investments of time and resources and often take a back seat to the more immediate needs of satisfying clients and building new project pipelines. Finding ways to better prepare and support evaluation consultants working in philanthropy is critical to meeting today’s needs. An analysis of survey responses found several mechanisms that are emerging to address this, including professional development specifically geared to philanthropic evaluation, foundation-sponsored peer-to-peer learning, internal training, and mentoring. (See Table 1.)

### *Root Cause No. 2: Disincentives for Collaboration and Shared Learning*

The high demand for evaluation has fueled competition among evaluators, which can impede collaboration and knowledge sharing with potential to advance shared capacity across practicing evaluators. Funders, too, may withhold information or be reluctant to share lessons learned from their own evaluation experiences so as not to privilege or provide “inside” information to contractors. Moreover, the social sector lacks structures and supports to facilitate learning and

**TABLE 2** Efforts to Support Collaboration and Shared Learning

Mechanism	Sample Efforts
<i>Intentionally designed convenings</i>	<p>Several respondents cited the FEAN convenings sponsored by Equal Measure, Engage R+D, and supporting funders as a rare opportunity to discuss cross-cutting issues in philanthropic evaluation with funders and evaluators in the same room.</p> <p>Foundations are often in a good position to sponsor learning exchanges across evaluators and foundation staff. The Gordon and Betty Moore Foundation, with support from the Center for Evaluation Innovation, recently brought together program staff and evaluators of systems-change initiatives throughout the country to discuss approaches to evaluating systems-change efforts. Stephanie Lerner described an effort by the Nellie Mae Education Foundation (NMEF) to bring together its current evaluators and program officers to share learning across individual programs and evaluations.</p> <p>Foundation convenings can take multiple forms, ranging from episodic, topically driven gatherings and annual or semiannual meetings to resourcing an ongoing network of participants.</p>
<i>Formal partnerships and collaboration</i>	<p>Several evaluators described participating in formal partnerships to pursue joint consulting projects. Such efforts are not entirely new – as Lindsay Hanson and Christina Kuo noted, Grassroots Solutions and other firms have pursued joint partnerships for nearly a decade – but they represent one strong approach for increasing collaborative learning.</p> <p>Foundations can also play a role in encouraging collaborative responses to requests for proposals, either through specific opportunities or systemic efforts. The Annie E. Casey Foundation explicitly encourages partnerships between evaluation firms and members of its Advancing Collaborative Evaluation Network of experienced evaluators from historically underrepresented racial and ethnic minority groups.</p>
<i>Informal knowledge exchanges</i>	<p>Several evaluators described taking part in informal knowledge exchanges, some of which are ongoing.</p> <p>Public Profit convenes informal networks of evaluators to talk about shared interests once or twice a year.</p> <p>Grassroots Solutions participates in quarterly CEO learning circles with other organizations, takes part in informal networking, and facilitates discussions with other evaluators and philanthropic organizations.</p> <p>Harder+Company has engaged in 90-minute learning exchanges between internal staff and practice leaders from outside firms, while offering a reciprocal opportunity to share its own expertise.</p> <p>Several FEAN members have developed loosely organized regional affinity groups among independent evaluators to share resources, discuss challenges, provide support, and identify opportunities for collaboration.</p>
<i>Embedded learning and reflection practices</i>	<p>Many foundation survey respondents discussed embedding learning and reflection processes into organization and project work to deepen collaboration and learning exchange across evaluators and funders.</p> <p>The NMEF regularly engages in sense-making sessions where “evaluators facilitate and share what they’re seeing, and [together with foundation staff] collectively make meaning and reflect on the work,” Lerner said.</p> <p>FSG offers a service designed to help foundations build learning capacity; it recently worked with the Ewing Marion Kauffman Foundation to build the collective capacity of both foundation staff and the foundation’s external evaluation consultants to facilitate intentional group learning.</p> <p>One foundation described how its adoption of emergent learning practices led to the implementation of intentional structures that support formal and informal learning moments involving internal staff and evaluation partners.</p>

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collaboration among funders and evaluators and with community stakeholders. Indeed, many philanthropic conferences explicitly exclude participation by non-foundation staff, impeding cross-sector discussion and reinforcing unproductive power dynamics (Bokoff, 2018). Events that focus on evaluation, such as conferences sponsored by AEA, the Center for Culturally Responsive Evaluation and Assessment, and regional networks, attract only a small contingency of foundation leaders and are not typically designed to foster deep exchanges that support relationship building, collaboration, and authentic knowledge sharing.

Funders and evaluators participating in FEAN convenings cite a need for new mechanisms to support shared learning among evaluators and across funders and evaluators. The good news is that both evaluators and funders are experimenting with a variety of approaches to deepen collaboration and shared learning, including intentionally designed convenings, formal partnerships, informal knowledge exchanges, and embedded learning and reflection practices. (See Table 2.)

### *Root Cause No. 3: Lack of Advancement on DEI Challenges*

FEAN raised three diversity, equity, and inclusion (DEI) concerns, related to talent, methodology, and funder readiness. First, it is broadly recognized that new voices and diverse perspectives in evaluation are essential to advancing equity. As in other fields, structural racism and other forms of oppression continue to plague the evaluation profession, which remains far too homogenous despite greater efforts to bring individuals with diverse lived experiences and perspectives into the field. Firms and foundations will benefit from recruiting, developing, and retaining evaluators with diverse backgrounds and experiences who can contribute their thinking to the major equity challenges facing our society. Second, the practice of evaluation must continue to evolve and adopt new design and methodological approaches that are consistent with and promote equity, an effort championed

by the Equitable Evaluation Initiative.<sup>2</sup> This includes considering how the notion of knowledge itself is culturally based and often tied to the establishment of cultural hegemony. Finally, foundations are key to these first and second efforts. Unless funders are ready to accept and value new voices, different ways of thinking, and new ways to think about evidence, efforts to cultivate and support new talent and better integrate DEI into evaluation and learning will fail.

Foundations and evaluators are acting to address DEI within evaluation and philanthropic practice. In addition to pipeline programs, designed to create paths into the evaluation profession for underrepresented groups, survey respondents described national initiatives to advance DEI broadly within evaluation and philanthropy, as well as organizational efforts — often in tandem with consultants — to embed DEI in their work, experimenting with new design and methodological approaches and taking steps to build momentum for deeper DEI work. (See Table 3.)

### *Root Cause No. 4: Single-User Focus for Most Philanthropic Evaluations*

Most evaluations commissioned by philanthropy are intended for the foundation and, perhaps, its grantees, and this single-user focus limits their value. A heavy focus on the needs of individual clients means that evaluation findings rarely inform the communities those findings are intended to benefit, and much less future investments by other funders or larger social-change efforts. While starting to take root, sharing evaluation findings beyond individual organizations is a nascent best practice. Broader sharing often is limited to posting an evaluation report on a website; an important step further would be to actively engage people with shared interest in evaluation findings to more deeply interact with the content. This would also help to increase the accountability of philanthropy to show how they are applying lessons learned to continuously evolve more impactful strategies. Another step is to support organizational capacity-building efforts as part and parcel of evaluation engagements so that targeted stakeholders

<sup>2</sup> See <https://www.equitableeval.org>

**TABLE 3** Efforts to Support Advancement on Diversity, Equity, and Inclusion

Mechanism	Sample Efforts
<p><i>Talent pipeline programs and internships</i></p>	<p>The Annie E. Casey Foundation and allied funders have long supported Leaders in Equitable Evaluation and Diversity, a professional development program that provides evaluation training and practical experience for historically underrepresented people of color. Scholars are often placed in foundations or firms that evaluate philanthropic efforts and are provided with mentoring support designed to help them navigate these environments effectively.</p> <p>The American Evaluation Association operates a Graduate Education Diversity Internship (GEDI) program to provide paid internship and training opportunities for students from groups traditionally underrepresented in the evaluation profession. Host sites include foundations as well as firms that conduct philanthropic evaluations.</p> <p>Several foundations are experimenting with internally sponsored internships as a way to build understanding of philanthropic work for recent graduates or early-career evaluators, especially those of color. One foundation even encourages its evaluation partners to include GEDI interns in consulting teams.</p> <p>Bright Research Group is a good example of firms that are developing their own talent diversification strategies. Bright established the Perez Research Fellowship, which provides a one-year stipend for undergraduates, graduate students, and retired professionals of color who want to learn about and contribute to the field of applied research and consulting.</p>
<p><i>Engaging in national field-advancing initiatives</i></p>	<p>Survey respondents cited several national efforts to advance equity in philanthropic evaluation and practice, many of which they are sponsoring, participating in, or otherwise supporting through their work.</p> <p>The Equitable Evaluation Initiative “seeks evaluation to be a tool for and of equity for those that have placed equity as core to their work,” according to Jara Dean-Coffey, founder of the Luminare Group. Over the next five years, this initiative will build an infrastructure that supports and advances (1) the imperative of putting equitable evaluation principles into practice; (2) shared inquiry, or learning and sharing insights as opposed to seeking “right” answers or a check-box approach to execution; (3) cross-sector learning and shared leadership; and (4) field building and mutually beneficial support to advance shared goals. Several foundations are undertaking equitable evaluation initiatives under the umbrella of this effort, including the Vancouver Foundation.</p> <p>The Center for Culturally Responsive Evaluation and Assessment sponsors an annual conference and other resources to support evaluations and assessments that embody cognitive, cultural, and interdisciplinary diversity.</p>
<p><i>Working with consultants and experts to build DEI centrally into organizational practices</i></p>	<p>Foundations and evaluators described efforts to build DEI into their organizational practices broadly and/or within their learning and evaluation work. A number of respondents noted that they are in early stages of efforts to embed DEI into their evaluation and grantmaking practices. Steps to build momentum for deeper work included developing a shared language around DEI, identifying values, creating a common understanding of DEI approaches, engaging a consultant to support planning, and using a DEI lens in hiring consultants.</p> <p>Steven LaFrance of Learning for Action highlighted his firm’s partnership with the David and Lucile Packard Foundation’s Organizational Effectiveness program to explore how to include DEI principles in capacity-building strategies throughout the foundation’s national and global work.</p> <p>Evaluator Susan Foster described partnering with a foundation client to conduct a developmental evaluation of its internal racial equity process.</p> <p>Findings from an external evaluation helped the Nellie Mae Education Foundation assess its strategy of responding to community needs.</p> <p>Harder+Company is working on a reflection guide to help staff understand where foundations are on their DEI journey and how to support next steps.</p>
<p><i>Methodologies, designs, and frameworks</i></p>	<p>Survey respondents described experimenting with new designs, methodologies, and frameworks for advancing DEI as part of philanthropic evaluation efforts. They ranged from including perceptual feedback from foundation beneficiaries and reconsidering “what counts as credible evidence” to engaging community input and defining what it means to improve a foundation’s equitable evaluation practices.</p>

**TABLE 4** Efforts to Improve Knowledge Dissemination and Broader Learning

Mechanism	Sample Efforts
<i>Building broad sharing into projects</i>	<p>Several respondents from foundations acknowledged the importance of planning for dissemination early in a learning engagement, considering as core audiences both local communities and others in the sector working on similar challenges, and making resources available to evaluators to support dissemination and shared learning.</p> <p>Jasmine Haywood noted that Lumina Foundation is “working more diligently to share evaluation learnings both internally and with stakeholders.” The foundation often builds resources into budgets to support the creation of blogs and infographics by evaluators.</p> <p>Mari Wright observed that the Gordon and Betty Moore Foundation has become more focused on transparency in evaluation findings and has committed to sharing all evaluations with its grantees and partners.</p> <p>The Nellie Mae Education Foundation is supporting one of its evaluation firms to turn a report into two issue briefs, one geared toward youth organizers and the other toward funders. The foundation covered the evaluator’s time to write the briefs and managed the graphic design process.</p> <p>The William and Flora Hewlett Foundation is partnering with the Center for Evaluation Innovation to author a book chapter on the developmental evaluation of its Madison Improvement Initiative. The chapter will describe “the methods used, how the evaluation informed strategy, and reflections and lessons about the developmental evaluation experience and approach,” Julia Coffman said.</p> <p>Likewise, some evaluation firms described being more mindful of audiences beyond the foundation from the beginning of an evaluation effort. In its work with Unbound Philanthropy, Learning for Action considered audiences beyond funders in the immigration movement during the planning stage of the evaluation, and then discussed how to match product and dissemination approach to audience. According to Steven LaFrance, “After considering the needs of internal audiences, we generally think through how what we’ve learned can support movement actors (activists, advocates, leaders, etc.) as well as funding partners.”</p> <p>Athena Bertolino of Ross Strategic described a similar emphasis on “encouraging and supporting product development that has outward-facing, field-building focus,” using an example of the firm’s work on the Kresge Foundation’s City Energy Project to highlight its approach.</p>
<i>Contributing to and supporting dissemination platforms</i>	<p>IssueLab by Candid was repeatedly identified as a key resource for knowledge sharing and dissemination. IssueLab is an accessible, searchable, browsable collection of more than 23,000 case studies, evaluations, white papers, and briefs from social-sector organizations around the world. Many foundations and firms are electing to post all of their evaluations to IssueLab.</p> <p>IssueLab and the Foundation Center by Candid’s #OpenforGood campaign were identified as key players in raising awareness and influencing norms related to transparency in the social sector. The Foundation Center by Candid, in partnership with Engage R+D, also released a GrantCraft guide to knowledge sharing that provides resources and tools (Nolan, 2018).</p> <p>Some foundations, including the Vancouver Foundation, have adopted an open licensing policy. Open licensing platforms like Creative Commons establish public copyrighting for published materials, giving users a legal means to download, share, or translate them. Many foundations and evaluation firms share reports and briefs on their own websites and blogs, or on sites of intermediary organizations.</p>
<i>Taking early steps</i>	<p>Some organizations reported that they are still building internal capacity and cultivating a supportive culture around knowledge sharing. Important to these foundations were small steps toward broader dissemination, such as sharing brief reports highlighting selected evaluation findings, providing memos to peer foundations working on similar issues, and synthesizing insights for internal program staff. The recent GrantCraft guide makes a strong case to foundations that sharing their knowledge is an integral, strategic aspect of philanthropy (Nolan, 2018).</p>

— nonprofits, evaluation firms, sector partners  
— can integrate lessons learned into practice.

Broadening the focus for evaluation beyond that of the commissioning foundation is critical to increasing the use and influence of evaluation. By shining a light not only on accomplishments, but also failures and lessons learned, funders and evaluators can accelerate the spread of knowledge about how to drive social change more effectively. Evaluators are well positioned to play an important “translator” role, helping to share relevant and useful findings across organizations working on similar issues from different vantage points. According to survey respondents, organizations are testing several new approaches to strengthen knowledge sharing and ensuring that insights and lessons from evaluative work are broadly shared, with the intent of broader application. These include planning for and embedding resources for dissemination in advance, contributing to and supporting dissemination platforms, and taking steps to ease into broader sharing of knowledge (See Table 4.)

### *Root Cause No. 5: Missed Connections to Strategy and Decisions*

To be most effective, external evaluation partners should be engaged as strategies are developed, investment decisions made, initiatives launched, and grants awarded. Too often, outcomes and impact have been defined by board members, executive leaders, program officers, and implementing partners before evaluators join the discussion. As a result, foundations may often have inappropriate expectations for what can and should be measured, which leads, unsurprisingly, to disappointment in the results and limited application of findings. While some evaluators are moving toward more developmental and formative approaches that help inform strategies as they unfold, too often evaluation products are untimely, laden with jargon, or ill-suited for action from the intended audience.

To support stronger resonance of evaluation and learning in philanthropy, findings must be actionable in the sense of informing decision-making and strategy. Both funders and evaluators are experimenting with techniques to increase the

uptake and application of findings; approaches include creativity in design and product format, better integration of facilitated learning and product development, support of design capacity, and utility as a driver of evaluation. (See Table 5.)

### **Looking Ahead**

Foundations and evaluators will better serve the social sector by moving toward a relationship in which evaluators serve as conduits of knowledge that gather and aggregate insights across diverse contexts and organizations. Embracing the solutions outlined in this article would reposition evaluators as playing a “crucial role in the social sector ecosystem” (Halverstadt, 2018, p. 16), rather than impartial vendors with little concern for driving social change. The authors of this article believe this key shift has the potential to accelerate the spread of knowledge, broaden and diversify the experience base of external evaluators working in philanthropy, and increase the value of evaluation and learning within foundations and, more broadly, across the social sector.

The authors are committed to deepening our exploration of how to increase the value that evaluation brings to philanthropy. We have secured resources to support an analysis of existing talent identification and development efforts by the Luminare Group, explore a shared-learning effort hosted by CEI, and ensure ongoing communications, network development, and management led by Engage R+D and Equal Measure. In 2019 we will work with FEAN members to identify five action areas to engage individuals in smaller work groups with a dedicated facilitator and documentarian to promote knowledge exchange. The goal of these groups will be to identify steps evaluators and funders can take together to advance outlined solutions and, ideally, produce more in-depth case examples of emerging efforts discussed here.

The intent is not to build an initiative with substantial infrastructure, but to rely on an informal, network approach to instigate changes among FEAN members testing different ways of working. We will crowdsource the topics of highest resonance and continue to share what we learn.

**TABLE 5** Efforts to Support Uptake and Application of Findings

Mechanism	Sample Efforts
<i>Creative design and alternative products</i>	<p>Participants identified strategies they are using to create appealing products for different audiences:</p> <ul style="list-style-type: none"> <li>• Making findings more accessible by improving data visualization, creating brief visual snapshots of selected findings, and developing easily digestible infographics.</li> <li>• Sharing findings in multiple, often dynamic formats, including blogs; interactive web-based platforms; video; interactive digital storytelling; and social media updates.</li> <li>• Translating findings into actionable tools (e.g., diagnostic criteria, field guides, action-planning rubrics) that others working on similar issues can use.</li> </ul>
<i>Integration of facilitated learning</i>	<p>Survey respondents discussed the importance of structuring deliverables so that they ask and answer critical evaluative questions using supporting evidence. Ideally, reports are tied to upcoming decisions about program investments, and clients are engaged in facilitated conversations that enable them to be part of interpreting data and prioritizing next steps. Tools such as data placements and gallery-walk presentations can be really helpful, along with techniques for facilitating intentional group learning.</p>
<i>Support of design capacity</i>	<p>Small and mid-size evaluation firms often have limited in-house design capacity. Some foundations, including the Ewing Marion Kauffman Foundation, make support from graphic designers and data visualization technical assistance providers available to evaluators as a way to improve the clarity and appeal of reported findings. The Kauffman Foundation also worked with Evergreen Data to produce a guide to actionable reporting that will be shared with all foundation grantees and be available on its website. Another strategy for supporting strong design involves having foundation communications staff partner with evaluators to build capacity in this arena.</p>
<i>Utility as a driver of evaluation</i>	<p>A few foundations emphasized the importance of clearly understanding how an evaluation will influence decision-making and strategy before embarking on an effort. As Trilby Smith of the Vancouver Foundation observed, “[We] embark on an evaluation of a particular granting program only when we can articulate exactly how we are going to use the results of the evaluation. This helps to ensure that the results will be actionable and have influence.”</p>

## Acknowledgments

We wish to acknowledge the many individuals whose time, resources, and generous sharing of insights informed the development of this article. This includes the funders supporting this work: the Gordon and Betty Moore Foundation, The California Endowment, California Health Care Foundation, David and Lucile Packard Foundation, Ewing Marion Kauffman Foundation, Ford Foundation, William and Flora Hewlet Foundation, and MacArthur Foundation. We are also grateful to the more than 200 active Funder and Evaluator Affinity Network members who have engaged in this field-building work on their own time and own

dime. A very special acknowledgment also goes to the 42 respondents to our Solution Sourcing Survey who agreed to be publicly recognized for contributing their insights to this article: the Annie E. Casey Foundation, Barr Foundation, Center for Evaluation Innovation, Colorado Health Foundation, Ewing Marion Kauffman Foundation, Foundation Center, FSG, Grassroots Solutions, Harder+Company, Kaiser Permanente Community Health–Southern California, Learning for Action, Lumina Foundation, Luminare Group, MacArthur Foundation, Marin Community Foundation, Moore Foundation, National Endowment for Democracy, Nellie Mae Education Foundation, PhilanthropywoRx,

Public Profit, Ross Strategic, Susan Foster Associates, Vancouver Foundation, and Wake Forest School of Medicine.

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