

FEAN Call to Action Series:  
**Global Transformation**

# **Advancing Global Evaluation Practice to Meet the World's Challenges:**

A Call to Action and Reflection

**Global Transformation 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.

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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

# Introduction

**Working together, foundations and evaluators can contribute to global transformation necessary to address the world's most pressing problems.**

Funders and evaluators based primarily in the U.S. and Canada have been collaborating on shared priorities through the Funder & Evaluator Affinity Network since 2017. The goal of FEAN is to change the relationship between funders and evaluators from a transactional one to a partnership, shifting the field of philanthropic evaluation to become fairer, more equitable, and more effective. In 2019, the conversation expanded to consider issues of interest to FEAN members working in the international arena.

The vision inspiring this brief is one in which North American foundations and evaluators can make significant contributions to achieving the [United Nations Sustainable Development Goals \(SDGs\)](#) as allies with people across the globe whose lives are most closely affected by pressing challenges, including climate change, migration, pandemics, growing authoritarianism, disparities and instabilities, and the depletion of critical resources.

The recommendations outlined in this paper are a starting point, an invitation to reflection and action. We explore how foundations and evaluators can nurture and grow a robust, inclusive ecosystem of what we call evaluation for global transformation (EGT). Such an ecosystem is necessary to co-create the paths by which funders and evaluators can catalyze innovative thinking and undertake coordinated action with others in support of global transformation.

In this brief, we take a critical look at the current state of EGT and what it will take to position evaluation to advance effective, equitable, and sustainable global transformation efforts. We begin by defining global transformation and its importance, describing the ways in which global development is evolving, and the growing role that philanthropy is playing within this arena. Next, we lay out an analysis of the current state of evaluation and resulting recommendations, building from conversations that took place among members of the Funder & Evaluator Affinity Network during 2019.

# Anti-Oppression Allyship in Global Development

Since these conversations began, more people have risen up to resist the deeply entrenched systemic racism in the United States and elsewhere. With the advent of COVID-19 and current racial justice protests, more people are stepping up to call racism by its name, own their part, and take a more active role in opposing and dismantling it.

Lessons for anti-racist allies<sup>1</sup> are equally applicable to global development work. International anti-oppression allies resist all structures of oppression, regardless of the category used to sort, “otherize,” and discriminate against any human being (including race, ethnicity, class, caste, religion, sex, gender, sexual orientation, physical ability and so on).

As privileged North Americans working in global development, now is the time to recommit to work as international anti-oppression allies, to own our privilege, and to listen, learn, and take responsibility. We must recognize:

- **Our privilege is a threat.** An international anti-oppression ally recognizes that our work often replicates, justifies, and props up oppressive structures operating inside our own organizations and through the programming we fund. We are not saviors.
- **Our privilege is also an asset.** Movements like [#ShiftthePower](#)<sup>2</sup> and community philanthropy are reshaping our understanding of what just engagement looks like. An ally goes beyond funding programming and hiring local evaluators, by “ensuring that local people have control over the resources they need to enable them to build the communities they want.”

The EGT ecosystem is primed for positive cultivation and development. Opportunities abound when it comes to harnessing existing assets and expertise, developing connections across practitioners, and leveraging existing infrastructure to build capacity. Now is a critical window of time to seize these opportunities, given the scale and complexity of the challenges we face.

<sup>1</sup> Courtney Ariel, “For our White Friends Desiring to be Allies,” *Sojourners*, August 16, 2017, <https://sojo.net/articles/our-white-friends-desiring-be-allies>

<sup>2</sup> Barry Knight, “Systems to #ShiftThePower,” *Global Fund for Community Foundations*, November 2019, <https://globalfundcommunityfoundations.org/wp-content/uploads/2019/11/SystemsToShiftThePower.pdf>

# Global Transformation: What It Is and Why It Matters

The notion of transformation came to the fore of development discourse during the participatory process of drafting the United Nations Sustainable Development Goals (SDGs), the 17 interdependent goals that represent a “blueprint to achieve a better and more sustainable future for all.” Development practitioners and experts from a broad range of organizations and countries sought to underscore the urgency and the opportunity in that moment with the title, *“Transforming our World: the 2030 Agenda for Development.”* The United Nations General Assembly unanimously ratified the 2030 Agenda (as part of UN Resolution 70/1) on September 25, 2015.

The use of the term “transformation” signaled the need to move beyond incremental change and “business as usual” approaches to global development. It also reflected increasing recognition that the pace and scope of our current problem-solving approaches are insufficient, ineffective, or even counterproductive for tackling complex global challenges, the effects of which humanity is already experiencing.

For some time, visionary leaders in the global development arena have been calling for profound change in the ways we work. The publication of Ben Ramalingam’s book *Aid on the Edge of Chaos*<sup>3</sup> and the [Doing Development Differently Manifesto](#) are two examples of attempts to re-imagine global development by embracing complexity-informed, locally-led, and adaptive approaches. These thought leaders and others in nongovernmental organizations, such as Oxfam, claim such reforms will result in more effective, equitable, and sustainable development solutions.

Since the adoption of the 2030 Agenda and the SDGs, the global development discourse on transformation has deepened to embrace integrated action on social, economic, political, and environmental fronts. The preamble of the 2030 Agenda states: “There can be no sustainable development without peace and no peace without sustainable development.” Equitable and inclusive social relations provide the foundation for sustainable economies. Inclusion is meaningless without the means to provide and sustain well-being today and tomorrow.

Five years later, the need for global transformation is even clearer. The challenges facing us today—climate change, migration, pandemics, growing authoritarianism, disparities and instabilities, and the depletion of critical resources—do not respect national boundaries and sectoral silos or respond to stand-alone projects. Positive outcomes for people and the planet depend upon truly transformative change in our societies and our economies, including evolution of the global systems that fund, plan, implement, and learn from efforts to tackle Earth’s most pressing problems.

<sup>3</sup>Ben Ramalingam, *Aid on the Edge of Chaos: Rethinking International Cooperation in a Complex World*, Oxford University Press, 2013.

# An Evolving Global Development Context

Even before the COVID-19 pandemic shook the foundations of economic, social, health and disaster response systems, signs of major transitions were visible within the global development system in which the EGT ecosystem is nested<sup>4</sup>. Global development has long been dominated by development assistance provided by the governments of higher income, predominantly Western countries, to middle and low-income countries.

Official development assistance, as defined by the Organisation for Economic Co-operation and Development (OECD) Development Assistance Committee,<sup>5</sup> is government aid that promotes and specifically targets the economic development and welfare of middle and low-income countries. Assistance can be provided bilaterally, from one country to another, in the form of grants, loans, in-kind services, and technical assistance to the government or civil society of a developing country.

Official development assistance from the U.S. and other Western countries is shrinking. In many historically significant bilateral donor countries, international assistance agencies have been downsized and their influence hobbled. These changes mean that official development assistance from high-income Western countries is no longer the most significant source of funding available to middle and low-income countries.

New governments are entering the development arena. Countries such as China, India, and others are providing official development assistance. It is also no longer uncommon for countries to simultaneously receive and provide development assistance. These new donors are disrupting long-standing power relations and increasing cooperation between middle and low-income countries.

Official development assistance is also channeled through multilateral institutions, such as the World Bank, United Nations, and the International Monetary Fund. Traditionally these organizations, funded by high-income countries, wielded considerable influence on the development agendas in middle and low-income countries. However, their assistance and overall influence is diminishing in the changing development assistance arena.

Today, official development assistance represents a small proportion of the resources available for development. Diversified resource flows for development include foreign investment, trade, remittances, philanthropy, and other private sources. Development financing options have expanded to include social investing, impact bonds, venture capital, impact investing, blended finance, and social enterprise.

<sup>4</sup> George Ingram and Kristin M. Lord, "Global development disrupted: Findings from a survey of 93 leaders," *Global Economy and Development at Brookings*, March 2019.

<sup>5</sup> "What is ODA?" *OECD.org*, last modified April 2019, <http://www.oecd.org/dac/stats/What-is-ODA.pdf>

Overall, the diversification of funding sources has brought new players to the global development arena and distributed influence in new ways. Donors represent specific interests and exert influence on development priorities, as well as the structures for the planning, implementation, and assessment of development initiatives. The diversification of actors and funding sources necessitates new forms of partnership between government, private, and nonprofit sectors. Political, trade, investment, and development objectives are intertwined in new ways. Members of these partnerships often come from different sectors, contexts, cultures, and organizational structures and they bring different perspectives and disparate priorities.

At the same time donors have increasingly recognized the value of aligning their efforts to support the national development agendas of low and middle-income countries to promote aid and development effectiveness. In the Paris Declaration on Aid Effectiveness developed in 2005, ministers from aid-giving and aid-receiving countries agreed to the principle of country ownership, stating “partner countries exercise effective leadership over their development policies and strategies and co-ordinate development actions.”<sup>6</sup> Since then, among a wide range of development actors, there has been a growing movement toward reinforcing nationally and locally driven development processes.

Going forward, the search for transformative development solutions must consider a more complete picture of the actors engaged in any specific development situation and the resources available to influence change. As the next section lays out, U.S. foundations are deepening their engagement in this evolving arena and have potential to make great contributions to the work.

<sup>6</sup> OECD, Paris Declaration on Aid Effectiveness, *OECD Publishing*, 2005, p. 3. Accessed at: <http://dx.doi.org/10.1787/9789264098084-en>.

# Philanthropy's Growing Role in Global Development

In 2015, international giving by U.S. foundations reached an all-time high with 9.3 billion U.S. dollars donated, a 29 percent increase from 2011<sup>7</sup>. The OECD survey<sup>8</sup> provides insight into international patterns of philanthropic contributions to global development. A total of 143 private foundations provided USD 23.9 billion during 2013-15. These sums are relatively modest, representing about five percent of official development assistance and 1.4 percent of total flows in support of development during the same three-year period. Although low overall, in key sectors such as public health, foundations are significant players, ranking as the third largest source of funds.

OECD survey findings reveal that the sources of philanthropic giving for developing countries are highly concentrated. A majority (81 percent) of philanthropic giving during 2013-15 was provided by just 20 foundations. Of the 143 foundations included in the data survey sample, the Bill & Melinda Gates Foundation was by far the largest philanthropic donor, having provided almost a half of total giving (49 percent).<sup>9</sup>

Philanthropy's potential for influence is greater than its wallet. Foundations' capacity for innovation and partnership can be a powerful driver of global transformation and the 2030 Agenda. Foundations can drive innovation, support bold new solutions, and take the kind of risks necessary to catalyze global transformation. Their experience partnering with government and other donors (67 and 45 percent, respectively, according to the OECD survey), makes them well-placed to broker and build the diverse coalitions required to solve problems that cross sectors, disciplines, and countries.

<sup>7</sup> "The State of Global Giving by US Foundations, 2011-2015," *The Council on Foundations*, 2018, <https://www.cof.org/content/state-global-giving-us-foundations-2011-2015>.

<sup>8</sup> OECD (2018), "Private Philanthropy for Development," *The Development Dimension*, *OECD Publishing*, Paris. <http://dx.doi.org/10.1787/9789264085190-en>

<sup>9</sup> Additional sources of foundation support originate from the United States, Canada, United Kingdom, Netherlands, Switzerland, and other European countries. However, sources also include India, Brazil, Mexico, Panama, People's Republic of China (incl. Hong Kong), United Arab Emirates, and some African countries.

# Evaluation for Global Transformation: Are We Ready?

Changes in global development and the way aid is planned, designed, and implemented have significant implications for the way evaluation is practiced and the role it plays in learning. For instance, new development actors may ask new questions and set new evaluation agendas. We can expect new players to organize their own processes of commissioning, procuring, managing, and using evaluation. To remain relevant, evaluators must work with new evaluation commissioners and users and adapt to changes in the evaluation marketplace.

If we work together, foundations and evaluators working in global development (EGT) can take a proactive stance to influence global development and contribute to the transformation of global systems to effectively tackle Earth's most pressing problems. To play a positive role, evaluation commissioners and practitioners must adapt their thinking, methods, and practices. We must embrace global transformation, expand the focus of evaluation from single-issue projects to global systems and challenges, and build an ecosystem of evaluation stakeholders invested in collaboration and evidence-informed solutions.

The concept of an ecosystem is helpful when considering how to strengthen EGT. The ecosystem concept helps us see capacity not at the individual or even organizational level, but as capacities or competencies present in the web of organizations, networks, and coalitions that make up the ecosystem. The EGT ecosystem is at an early stage of development as a field. While inspiring initiatives exist, the ecosystem lacks the infrastructure necessary to sustainably advance EGT. Changing this will require funders and evaluators to work together to build greater capacity and infrastructure.

# Strengthening the Evaluation for Global Transformation Ecosystem

The Bridgespan Group's Strong Field Framework advances an approach to assessing the needs and strengths of a field. It outlines key components of a thriving field, including shared identity, ecosystem leadership and member engagement, funding and supporting policy, knowledge base, and practice exemplars. Members of the Funder & Evaluator Affinity Network met and applied this framework to the EGT ecosystem with the goal of identifying recommendations for improvement. Because the ecosystem is still in its early stages of development, we consider application of this framework as an initial starting point. We encourage the exploration of other conceptual framings to represent, explore, and inspire contributions to the ecosystem.

Below, we describe the current status of each of the "Strong Field" components and resulting recommendations. Overall, this analysis suggests ways foundations and evaluators can join forces with current efforts, undertake complementary actions, and support innovative initiatives to enhance the EGT ecosystem.

## Shared Identity

A shared identity is the foundation for any field of practice, without which individuals and organizations with similar motivations and goals may end up working in isolation or at cross-purposes. In the Strong Field Framework, shared identity links the other components together in common purpose. In a well-developed ecosystem, members can describe the field, its distinguishing characteristics, and what it is trying to accomplish. They can identify other individuals and organizations working in the field and identify common or complementary approaches and practices. Members may collaborate or compete with one another for resources.

### Current status

As described earlier, there is increasing recognition that global transformation, in contrast to incremental change, is necessary. A few inspiring initiatives, such as the International Development Evaluation Association<sup>10</sup>, Blue Marble Evaluation, and the SDG Transformation Forum and its Evaluation for Transformation Working Group, call on evaluation to play a strategic role in advancing social, economic, and environmental transformation in line with SDGs. But, this vision has not been embraced widely in either U.S. philanthropy or evaluation. Philanthropic programming and its associated evaluation are generally commissioned for a single project or program, often bound within a single sector. Evaluators are often sought for their specific domain expertise.

<sup>10</sup>Rob D. van den Berg, Cristina Magro, and Silvia Salinas Mulder (eds), "Evaluation for Transformational Change: Opportunities and Challenges for the Sustainable Development Goals," *IDEAS*, 2019.

Currently, U.S. philanthropic programming and associated evaluation practices do not reference “global transformation.” However, several adjacent concepts such as tackling wicked problems (e.g., climate change, migration) and supporting social and political shifts (e.g., increasing equity and inclusion, combatting authoritarianism) have gained a solid foothold. Large-scale social change evaluation is a growing practice area, as is the [Equitable Evaluation Framework](#). To provide a common purpose for EGT, these separate streams need to be recognized as interconnected and global in scale.

### **Recommendations to strengthen shared identity**

Both philanthropy and evaluation have active organizations built on shared values that provide opportunities to seed and nurture a shared identity for EGT. For example, the Evaluation Directors group, an informal group composed of leaders of U.S.-based foundation evaluation and learning functions, offers an avenue for leadership. The American Evaluation Association’s Guiding Principles offer a powerful means to unite evaluators in support of the common good. Recommendations to strengthen shared identity include:

- Conduct a landscape assessment of actors in the EGT ecosystem, their roles, influence, and power. Attend to the language and terminology used in this space. What terms are being used by what groups? How do those terms define communities of actors in this space? How can language be used to connect disparate groups and thus strengthen collaboration?
- Expand the dialogue outside of U.S. philanthropy and actively seek opportunities to listen, learn, and work alongside international allies.
- Spotlight the role of EGT with messages that build on and contribute to shared values and are resonant with various stakeholder communities such as evaluators, evaluation commissioners, and users.
- Draft a change management plan and communications strategy for shifting power and capacity in favor of global transformation.
- Invest in efforts to build a community of evaluation stakeholders around shared values, vision, and knowledge base. Draw on cases of successful field-building initiatives<sup>11</sup> to help us build broad, values-based support.

### **Ecosystem leadership and member engagement**

A lively ecosystem is characterized by broad member engagement and visionary leadership. Influential leaders and exemplary organizations are well linked to diverse constituencies in both the Global South and North. Leadership and members active in the EGT ecosystem represent key segments of the field, including practitioners, researchers, policymakers, field-serving organizations, donors, and evaluation service providers.

#### **Current status**

A few charismatic and pioneering leaders are highlighting the urgent need for evaluation to actively support global transformation. Even as they gain in voice and following, this relatively small number of leading individuals and organizations have limited capacity to engage with a broad base of supporters. Larger and more sustained funding is needed to support the development of infrastructure that can build and engage with a broad base of supporters.

<sup>11</sup>Examples of successful field-building initiatives include Fund for Shared Insight, the Outcome Mapping Learning community, and the Conservation Members Partnership.

Evaluators are increasingly convinced of the importance of supporting global transformation; however, in a nascent ecosystem, opportunities for practice are limited and involvement is largely unfunded. For many, engagement in this space consists primarily of attending webinars and reading books and blogs. The sparsely populated ecosystem lacks sufficient diversification and specialization in terms of perspective, background, and role in the space.

### **Recommendations to strengthen leadership and member engagement**

Although foundations have not yet taken up support of EGT, many have played effective field-building roles elsewhere by investing in organizational capacity and strengthening linkages between organizations and individuals in a field. Philanthropy can draw on a wealth of lessons learned to steer investment in building a diverse and resilient ecosystem. Recommendations to strengthen leadership and member engagement include:

- Expand ecosystem membership—those who practice and promote EGT—by deepening engagement with a wide range of evaluation stakeholders working in varied settings and playing different roles vis-à-vis evaluation.
- Recognize and support leaders representing diverse communities, experiences, and perspectives (including gender, race/ethnicity, geography, other equity categories) through new and current institutional venues, such as International Organization for Cooperation in Evaluation (IOCE) and EvalPartners.
- Strengthen connections between the ecosystem leadership and evaluation stakeholders. Reinforce and broaden channels for two-way communication between influencers and evaluation users and practitioners.
- Ensure the availability of career development and practical education opportunities in EGT for evaluators and evaluation stakeholders.
- Invest in venues for peer engagement including interactive workshops, communities of practice, innovation clinics, and pilots of new approaches. Fund small contracts, grants, and projects to expand the pool of practitioners. Contribute to the knowledge base by sharing lessons learned.
- Engage in partnerships with philanthropy field-serving entities, such as the Evaluation Roundtable, CHANGE Philanthropy, and Grantmakers for Effective Organizations in order to raise awareness and increase commitment to EGT.

### **Funding and supporting policy**

According to the Strong Field Framework, “dedicated funding, along with supporting policy, can foster the development of a field.” In a well-developed ecosystem, sufficient funding exists to ensure capacity is developed broadly across organizations. There is also an enabling policy environment that supports and encourages good practice. Ideally, different actors within the field are actively involved in cultivating supportive policy and organized funding streams across public, philanthropic, and corporate sources of support.

#### **Current status**

Within international development evaluation, large bilateral and multilateral agencies, such as the World Bank and USAID, play a significant role in commissioning evaluations and setting policy that influences the entire field. Philanthropy’s relatively recent

involvement in international development and relatively low funding levels dilutes its influence in the practice of evaluation in this arena.

Philanthropy's potential influence is greater within the nascent field of EGT. Philanthropy is well on its way to becoming a vocal advocate for the SDGs and global transformation. This presents an as yet unrealized opportunity to insist on evaluation's critical role in advancing global transformation. At this time, EGT garners insufficient attention and it will take time for larger, more bureaucratically structured organizations to draft and adopt relevant policy. Foundations may pivot more nimbly to embrace this emerging practice area, nurture its growth, and craft guidance to encourage its advancement.

A handful of large foundations regularly commission evaluations of their international development work, such as the David & Lucile Packard, Ford, Hewlett, MacArthur, and Rockefeller Foundations. These efforts provide a critical foundation for expanding EGT. Unfortunately, funding for philanthropic evaluation is generally embedded in program budgets and few foundations have dedicated evaluation resources that can be applied to learning, and development of practice across such efforts.

Because of its focus on transforming social and economic systems, multi-stakeholder, cross-sector efforts are essential for global transformation programming and evaluation. A variety of forums could be harnessed to drive greater attention to, coordination of, and investment in EGT field-building efforts, including the Funder & Evaluator Affinity Network, which has already elevated this issue, along with the Equitable Evaluation Initiative, the Advancing Collaborative Evaluation network, and affinity groups such as Evaluation Directors, Left Coast Evaluators, Organizational Effectiveness Leadership, and Foundation Executives.

### **Recommendations to strengthen funding and supporting policies**

While there remains great opportunity to focus and coordinate investments, the good news is foundations have resources to apply to these issues. Recommendations to strengthen the amount and application of funding in this space include:

- Advocate for evaluation's critical role in global transformation.
- Strengthen the role of foundation evaluation and learning departments in EGT field-building and innovation by allocating dedicated resources within their budgets for this purpose.
- Fund pilots designed to increase knowledge of promising practices and innovations in EGT. Allocate funding to lift up field-relevant insights as part of evaluations commissioned by program departments.
- Embed greater attention to EGT within existing intermediaries such as Grantmakers for Effective Organizations and the Center for Effective Philanthropy.
- Create talking points and a toolkit for funders and evaluators to use when making the case for resources to support field-building in this area of evaluation.

## Knowledge base

In a well-developed ecosystem, a lively community of practitioners and researchers advance practice and contribute to a knowledge base that is broad and deep. Researchers and practitioners communicate freely through organized and self-organizing channels of communication, and there are viable means to collect, analyze, debate, and disseminate knowledge. Those working in the field can turn to exemplary approaches, theoretical frameworks grounded in ecosystem transformation, and credible sources of evidence, technical assistance, and capacity building.

### Current status

As one of the earliest gatherings focused on EGT, the 2019 International Development Evaluation Association publication and conference mark an important milestone in building a knowledge base for the EGT ecosystem. An ecosystem building lens helps us consider ways to effectively build on this important resource and other pioneering efforts. How well developed is the evidence and knowledge base supporting this field? Are experts researching this field? Are there organized channels of communication between researchers and practitioners? Are there vehicles to collect, analyze, debate, and disseminate knowledge?

EGT practitioners are few and often work in isolation from one another. Even fewer researchers are studying or contributing to practice improvement. While forums exist in which practitioners and researchers can connect, exchange insights, and identify potential innovations, progress is slow. Infrastructure is relatively fragmented and often not focused on EGT issues specifically. In addition, funders and evaluators are often focused on their own projects and have not fully adopted mindsets that are oriented toward knowledge creation and sharing.

### Recommendations to strengthen knowledge base

What will it take to strengthen the knowledge base and ensure that practitioners can learn from promising approaches and credible sources of evidence, technical assistance, and capacity building? Recommendations include:

- Pilot experiences where funders and implementers co-create monitoring, evaluation, and learning systems and share knowledge resulting from such efforts.
- Support an AEA professional development workshop on EGT as a means of creating a basis for further methodological inquiry.
- Create a platform for knowledge-sharing in EGT that is accessible, thoughtfully curated, and actively maintained, perhaps through collaboration with existing platforms such as the Better Evaluation website.
- Convene and nurture communities of practice that draw on lessons from other successful knowledge-sharing efforts such as the Outcome Mapping Learning Community.
- Sponsor a *Foundation Review* journal issue on EGT as a means of building knowledge and highlighting its relevance.

- Influence and support U.S.-focused intermediaries (e.g., Evaluation Roundtable, the American Evaluation Association, Center for Effective Philanthropy, International Initiative for Impact Evaluation, and Grantmakers for Effective Organizations) to host spaces that contribute to knowledge creation and exchange; seek allyship with non-U.S. actors with potential to enrich these.
- Fund or support research on EGT and complexity-informed, locally-led, and adaptive approaches as key aspects of reimagining and transforming global development.
- Encourage program officers to embed funds for field knowledge-sharing in evaluation budgets (e.g., provide talking points for making the case for such investment, along with boilerplate language for evaluation contracts).

### Exemplars of practice

In a well-developed ecosystem, exemplary models of practice exist and resources (e.g., guiding principles, identification of key competencies, toolkits) are widely available to support replication and/or adaptation of these models. Exemplars, in turn, inform the development of practice standards. Professional development training and respected credentialing is available to those interested in educating themselves further, and technical assistance is available to support existing practitioners.

#### Current status

Evaluators working within the U.S. philanthropic context can turn to several resources for generating, curating, and disseminating evaluation practice exemplars. While some of these hold relevance to EGT (e.g., Equitable Evaluation Initiative, Johnson Center), exemplars specific to EGT are too few. Evaluation case examples are generally focused on domestic or single-funder programs, rather than cross-cutting global issues and initiatives. Overall, lack of shared field identity inhibits more cohesive knowledge-sharing and development of tools that have broad relevance for evaluators working in this arena.

#### Recommendations to strengthen exemplars of practice

A number of promising opportunities exist for making progress in this arena. Many of these recommendations could be accomplished with modest investment.

- Create and share a learning agenda for EGT, highlighting the role philanthropy can play in promoting learning across the diverse array of organizations and actors working for global transformation and how this can benefit its agenda.
- Create an EGT affinity group within GEO to showcase exemplars.
- Conduct case studies with evaluators doing high-quality work and, where appropriate, identify generalizable recommendations from these. Identify examples of community-driven and appreciative evaluation efforts and synthesize insights and lessons across these for field dissemination.
- Develop a Candid/Grantcraft guide to guide foundation staff working in EGT.
- Support the identification, validation, and promotion of evaluator and funder competencies specific to EGT practice building on relevant work from such groups as Blue Marble Evaluators and the Johnson Center.

## A Call to Reflection and Action

In closing, this paper posits that North American foundations and evaluators have a critical role to play at this pivotal time in contributing to global transformation efforts necessary to address the world's most pressing problems. However, realizing this vision will require intention, collaboration, and imagination. This brief situates EGT in the context of a changing global development system and provides an analysis of field-level needs and opportunities along with recommendations. We hope this work catalyzes further dialogue about what it will take to strengthen this field and deepens the commitment of funders and evaluators to proactively harness these opportunities.

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