



# TRANSFORMING FUNDER & EVALUATOR RELATIONSHIPS

FUNDER & EVALUATOR AFFINITY NETWORK

SESSION 2

# OUR FACILITATORS

**Engage R + D**



**Pilar Mendoza**  
Senior Consultant  
Engage R+D

**Equal Measure**



**Carise Mitch**  
Senior Communications Consultant,  
Equal Measure

# TODAY'S SESSION



Overview of the Funder & Evaluator Affinity Network



Lightning Round Presentations (x2)



Small Breakout Group Discussions (x2)



Closing & Next Steps



## SHARED GOALS OF FEAN

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

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

## WHAT'S NEXT

- Continue to promote Call to Action resources
- Culminating blog post on FEAN's accomplishments and what's needed now



# OUR SPONSORS

GORDON AND BETTY  
**MOORE**  
FOUNDATION

 The  
California  
Endowment

 EWING MARION  
**KAUFFMAN**  
FOUNDATION

 WILLIAM + FLORA  
Hewlett Foundation

 The **James Irvine**  
Foundation

the David &  
Lucile **Packard**  
FOUNDATION

 **FORD**  
FOUNDATION

 California  
Health Care  
Foundation

WALTON FAMILY  
FOUNDATION  


**MacArthur**  
Foundation

# OUR PRESENTERS

## Strategy & Practice



**Sara Stachowiak**  
CEO, ORS Impact



**Nikki Kalra**  
Consultant,  
ORS Impact



**Kim Ammann  
Howard**  
Director of Impact  
Assessment and  
Learning, The  
James Irvine  
Foundation

## Evaluators of Color



**Fontane Lo**  
Senior Program  
Office of Evaluation  
and Data Strategy,  
Blue Shield of CA  
Foundation



**Rachele C Espiritu**  
Founding Partner,  
Change Matrix



# STRATEGY AND PRACTICE

Good Intentions Are Not Enough: Making Evaluations More Useful For Foundation Strategy and Practice

Sara Stachowiak, CEO and Nikki Kalra, Consultant,  
ORS Impact

Kim Ammann Howard, Director of Impact Assessment and Learning,  
The James Irvine Foundation



## ISSUE

Evaluations don't always result in meaningful insights for foundations.

# SOLUTION

The brief created by the Strategy and Practice Action Team outlines six areas of focus and change that will help improve the application of evaluation in philanthropic strategy

## **Good Intentions Are Not Enough:**

Making Evaluations More Useful  
for Foundation Strategy and Practice

Strategy & Practice Action Team

Lead Authors:

Sarah Stachowiak, ORS Impact

Nikki Kalra, ORS Impact

Kim Ammann Howard, The James Irvine Foundation



## 5 STRATEGIES

- **Orient** external evaluators to internal context
- Ask questions and for findings that **support decision making**
- Push staff to think of **evaluators as critical friends**
- Approach evaluation in ways that **share power**
- **Build processes** that hold staff accountable to use findings to inform their work

## WHERE YOU CAN FIND US

*Good Intentions Are Not Enough: Making  
Evaluations More Useful for Foundation Strategy  
and Practice*

<https://fdnweb.org/fean/call-to-action/strategy-and-practice/>

FEAN Website:

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



## DISCUSSION QUESTIONS

- Which of the strategies feels most relevant for your work and why?
- How might we use these strategies to advance equity?



# OUR PRESENTERS

## Strategy & Practice



**Sara Stachowiak**  
CEO, ORS Impact



**Nikki Kalra**  
Consultant,  
ORS Impact



**Kim Ammann  
Howard**  
Director of Impact  
Assessment and  
Learning, The  
James Irvine  
Foundation

## Evaluators of Color



**Fontane Lo**  
Senior Program  
Office of Evaluation  
and Data Strategy,  
Blue Shield of CA  
Foundation



**Rachele C Espiritu**  
Founding Partner,  
Change Matrix



# EVALUATION IS SO WHITE:

Systemic Wrongs Reinforced by Common Practices and How to Start Righting Them

Fontane Lo, Senior Program Officer, Evaluation & Data Strategy  
Blue Shield of CA Foundation

Rachele C Espiritu, Founding Partner  
Change Matrix  
Co-Director, Expanding the Bench

## ISSUE

Funders occupy a position of power in the evaluation ecosystem.

We too must take responsibility and change our behavior.

## COMMON PRACTICES

Some common funder practices have the unintentional impact of hindering diversity in this field:

- RFPs ask for a scope and evaluation design upfront
- RFPs ask for a diverse evaluation team as a proxy for cultural relevancy
- Funders send RFPs to a limited number of firms based on past relationships and peer recommendations
- Funders who ask for the most senior consultants (who are predominantly white) to be the face of the work

## SOLUTIONS

Recognize the important roles that evaluators have in philanthropy:

- Shaping definitions of success
- Amplifying voices of community members
- Ensuring funders hear about what's not working and when funders get in the way of success



## SOLUTIONS

Engage evaluators who bring a variety of lived and cultural perspectives to impact philanthropy. They bring:

- Cultural and historical knowledge that can shape evaluations, interpretation of findings, and implications
- Personal stake and lived experience that can provide deeper insight on root causes of disparities and inequities
- Community trust and relationships, ensuring that different voices are heard

## 5 STRATEGIES

- Select evaluators on **qualifications and experience** and build the design process into the contract
- Avoid tokenism by **articulating why a diverse team matters** to your impact
- **Be proactive in building your network** with evaluators of color, look beyond the usual suspects (e.g., try a virtual coffee break with [Expanding the Bench ACE Network](#)).
- Value and resource **professional development and inclusion** for emerging evaluators
- Value and resource the **internal DEI work** needed in evaluation firms.

## WHERE YOU CAN FIND US

*Evaluation is So White: Systemic Wrongs Reinforced By  
Common Practices and How to Start Righting Them  
(Action Brief and Self-Reflection Tool)*

<https://fdnweb.org/fean/call-to-action/evaluators-of-color/>

<https://fdnweb.org/fean/uncategorized/new-resource-righting-systemic-wrongs-a-self-reflection-tool/>

FEAN Website:

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



## DISCUSSION QUESTIONS

- Which of the strategies feels most relevant for your work and why?
- How might we use these strategies to advance equity?



# THANK YOU!

Questions? Contact FEAN at:

[FEAN@equalmeasure.org](mailto:FEAN@equalmeasure.org)

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