TRANSFORMING FUNDER & EVALUATOR RELATIONSHIPS
FUNDER & EVALUATOR AFFINITY NETWORK
SESSION 1
OUR FACILITATORS

Engage R + D

Pilar Mendoza
Senior Consultant
Engage R+D

Equal Measure

Carise Mitch
Senior Communications Consultant,
Equal Measure
Overview of the Funder & Evaluator Affinity Network

Lightning Round Presentations (x3)

Small Breakout Group Discussions (x3)

Closing & Next Steps
SHARED GOALS OF FEAN

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

https://fdnweb.org/fean/
• Join us on for our next webinar on 7/15
• Continue to promote Call to Action resources
• Culminating blog post on FEAN’s accomplishments and what’s needed now
OUR PRESENTERS

Knowledge Sharing
Janet Camarena
Senior Director of Candid Learning, Candid

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

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

Collaboration & Partnership
Yvonne Belanger
Director of Learning & Evaluation, Barr Foundation

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

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

Janet Camarena, Senior Director of Candid Learning, Candid
Karuna Chibber, Evaluation and Learning Officer, The David & Lucile Packard Foundation
As a sector, we are reticent to share lessons from our work—authentically, transparently, and in partnership with the nonprofits and communities we support.

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

OUR OPEN LETTER

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

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

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

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

Yet too often, we extract information from nonprofits and communities for evaluative purposes, only to keep the learning to ourselves, or perhaps share it with a few like-minded peers. This drains precious time and resources as we all struggle to find the information we need, creates unproductive echo chambers where ideas go unchallenged, and perpetuates the divide between knowledge haves and have-nots, curtailting 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.
• Make a commitment: Sign the open letter

• Open up! Adopt new policies, use repositories, open standards and digital object identifiers

• Start with a reflection: Use our discussion guide as a tool

• Build dissemination into your plan: with our dissemination planning tool as a guide.
OPEN UP!

- Adopting open knowledge and open licensing policies

- Use open repositories for storing knowledge products

- Use open standards and digital object identifiers for knowledge on your website
OPEN UP! CASE STUDY:
S.D. BECHTEL, JR. FOUNDATION

- **Relying on institutional memory is not a scalable method.** Collect grantee knowledge products through your grants portal or tag knowledge-building grants in your database for easy searchability later.

- **Traditional copyrights create more work** because you must seek permission to share every knowledge product. Adopt open licensing so you can easily share grantee knowledge.

- **Even if you don’t think you are using traditional copyright, original work is automatically protected by copyright** if you don’t implement open access policies.

- **DOIs or digital object identifiers are very important for limited life foundations because DOIs provide an unbreakable link to knowledge products.**
OPEN FOR GOOD KNOWLEDGE SHARING TO STRENGTHEN GRANTMAKING
**DISCUSSION GUIDE: A SET OF REFLECTION QUESTIONS**

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<th>Areas of Inquiry</th>
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<td>Clarifying purpose, values, and expectations</td>
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<td>• Values related to sharing</td>
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<td>Anticipating and addressing challenges</td>
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<td><strong>Decision Points</strong></td>
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<td><strong>Content</strong></td>
<td>What do we need to learn? What do our partners and the field need to learn?</td>
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<td><strong>Audience</strong></td>
<td>Who would benefit from this learning?</td>
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<td><strong>Goal</strong></td>
<td>How do we hope our audiences will use the content? What decision points or action steps will it inform?</td>
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<td><strong>Timing</strong></td>
<td>When do our audiences need to have access to the content for it to be relevant and useful?</td>
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<td><strong>Product</strong></td>
<td>Based on what we know about our audiences and the contexts in which they work, what product formats would support our goals?</td>
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<td><strong>Vehicle</strong></td>
<td>What are the best channels for reaching our audiences?</td>
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<td>What are the best ways to amplify our messages?</td>
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<tr>
<td><strong>Messenger</strong></td>
<td>Who are the most credible and connected messengers who can lead our audiences to the products?</td>
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CALL TO ACTION: SIGN FEAN'S OPEN LETTER

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

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

In solidarity,

- Janet Camarena
  Director, Candid Learning Lab
- Ashleigh Halverstadt
  Senior Manager, Evaluation and Learning Officer
- Kimberlin Butler
  Vice President, Engagement and Learning
- Gabriela Fitz
  Principal, Enough Food
- Karuna S. Chibber, PhD
  Professor of Business Administration
- Yvonne Belanger
  Director of Learning & Development
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- Sandra Silva
  Chief Human Resources Officer
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  Director, Engagement
- Sonia Taddy-Sandino
  Director, Learning
- Meg Long

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- Halie Pekoff
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  Principal
- Christina Koo
  Senior Strategist

- Karina Cotter

Contact us at info@fean.org

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

SIGN THE LETTER

First Name
Last Name
Organization
Title
Email

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

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

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

FEAN Website:
https://fdnweb.org/fean/
- Which of the strategies feels most relevant for your work and why?

- How might we use these strategies to advance equity?

- What strategies have worked for you to overcome barriers to knowledge sharing?
GLOBAL TRANSFORMATION

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

Heather Britt, Principal Research Scientist, NORC at the University of Chicago
As philanthropy takes on a larger role in global development, foundations and evaluators can make significant contributions to global transformation as allies with people across the globe whose lives are most closely impacted by pressing challenges.
The Sustainable Development Goals (SDGs) provide a blueprint for a better and more sustainable future for all.
This brief identifies ways that foundations and evaluators can transform the practice of evaluation to better serve global transformation, and harness philanthropy’s unique position to nurture and grow a robust, inclusive Evaluation for Global Transformation (EGT) ecosystem.
EVALUATION FOR GLOBAL TRANSFORMATION (EGT)
5 STRATEGIES

- **Reimagine** evaluation’s contribution to global transformation.

- **Build** capacity in an EGT ecosystem.

- **Expand** EGT ecosystem membership and ensure equity.

- **Develop** a shared learning agenda for EGT.

- **Fund** the shared EGT learning agenda.
Advancing Global Evaluation Practice to Meet the World's Challenges: A Call to Action and Reflection

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

FEAN Website:
https://fdnweb.org/fean/
- Which of the strategies feels most relevant for your work and why?

- How might we use these strategies to advance equity?

- What strategies have worked for you to advance evaluation for global transformation?
COLLABORATION & PARTNERSHIP

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

Yvonne Belanger, Director of Learning and Evaluation, Barr Foundation
Rachel Mosher-Williams, Founder and Principal, RMW Consulting Group LLC
Logistical and relational barriers impede collaboration and knowledge-sharing that could advance the collective capacity of the field, and in turn, inhibiting diversity and quality of learning.

Mindsets and behaviors on the part of both funders and evaluators make partnerships difficult and create barriers to equity and philanthropic impact.
Partnerships can build capacity in the field and advance diversity, equity, and inclusion.

Funders and evaluators need to shift practices and develop the will to create a warmer climate for partnerships.

This guide outlines promising practices for both evaluation firms and funders that support better partnerships, along with field-level recommendations.
STRATEGIES

• Engage earlier and in lower-stakes settings

• Rethink the economics

• Review equity implications of practices

• Invest in networks
Major Dimensions of Evaluator Partnerships

Key Decisions Along the Way

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

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

**At Close**
- With whom will we share findings and with what degree of transparency?
- How will the work be credited and recognized externally?
- If follow up work is needed, who gets the contract?
- How will opportunities for thought leadership and field building resulting from work be resourced, staffed, and managed?
Better together: How Evaluator Collaborations Can Strengthen Philanthropy and Increase Collective Knowledge

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

FEAN Website: https://fdnweb.org/fean/
- What strategies have you used to strengthen partnerships?

- How have partnerships advanced equity and increased the impact of your organization's work?
THANK YOU!

Questions? Contact FEAN at:
FEAN@equalmeasure.org

https://fdnweb.org/fean/