FEAN
Funder & Evaluator
Affinity Network

FEAN Call to Action Series:
Strategy & Practice

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

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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Wanda Casillas, Senior Director, Equal Measure
Meg Long, President, Equal Measure
Pilar Mendoza, Senior Consultant, Engage R+D
Clare Nolan, Co-founder, Engage R+D
Victoria Worthen Lang, Consultant, Equal Measure

Series Editor: Carise Mitch, Senior Consultant, Communications, Equal Measure

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

Evaluators—those inside foundations and those working on the outside—generally come to their work out of a love of data and social science combined with a desire to use these skills to help make the world a better place. The people we know in the field are passionate about how insights from our evaluative efforts can help make a real difference, faster, for more people, and for those farthest from privilege.

In a 2019 report,, the Center for Evaluation Innovation[1] cited the most significant challenge for foundations' evaluation efforts as "having evaluations result in meaningful insights for the foundation." The Center also found the issue had risen in rank since its prior study in 2015, where it was cited as the third most significant challenge foundation evaluation staff faced.

In 2019, the Evaluation Roundtable for the first time broke with historic practice and invited evaluation consultants to join a gathering that had previously been exclusive to foundation evaluation staff. As part of the meeting, the facilitators asked all participants to write down what they most wished the other would do differently. The number one request of foundation evaluation staff? **Ask harder questions.** The number one request by external evaluators? **Let us ask harder questions.**

If we both want the same things (harder questions addressed) for the same reason (equitable progress toward the ambitious, inspirational missions that foundations aspire to), why aren't we doing better?

Clearly, good intentions are not good enough.

[1] Tanya Beer, Julia Coffman, Mariah Brothe Gantz, Albertina Lopez, Kat Athanasiades, "Benchmarking Foundation Evaluation Practices 2020," *Center for Evaluation Innovation*, January 2020

It is not a simple problem with a straightforward solution. Planning and designing evaluations which result in meaningful and actionable insights for foundations is not resolved by external evaluators creating "better" evaluations. It is a systemic issue, with many inter-related components, differing perspectives, and spheres of influence, which include:

- Skilled evaluators with imperfect knowledge of the relational dynamics in their clients' institutions;
- Program staff with varying levels of power and knowledge/experience with evaluation and strategy, and may hear conflicting messages about the purpose of evaluation;
- Foundation executive leadership and boards have varying levels of institutional power as well as experience with, expectations of, and appetite for evaluation;
- Foundation evaluation staff, who are most often the bridge between foundations as institutions and program staff and evaluators, are oversubscribed with many roles to fill for organizations around evaluation policy, sourcing, learning, knowledge management, and more;
- The overall context of the fields of philanthropy and evaluation, with historical practices that make collaboration challenging, such as an apprentice-style model of training and incentives that lead to competition versus cooperation. [2]

Given these complex systems actors and dynamics, we believe foundation evaluation staff and external evaluators can do more to own their different spheres of influence and address leverage points to tap more potential for meaningful evaluation work. This paper presents six cross-cutting areas for focus and change along with specific actions that external evaluators and foundation evaluation staff can take to help accelerate the meaningful use of evaluation for foundation strategy and practice.[3]

[2] Meg Long, Clare Nolan and Debra Joy Perez, "Evaluators as Conduits and Supports for Foundation Learning," *The Foundation Review*, 2019. https://doi.org/10.9707/1944-5660.1456
[3] While program staff and foundation leadership also have roles to play in this area, we have focused our recommendations on foundation evaluation staff, as these actions tend to fall most squarely within their set of organizational responsibilities and roles relative to foundation staff and leadership.

Background on the Strategy & Practice Action Team

As part of the Funder & Evaluator Action Network (FEAN), we set out to engage with a range of foundation evaluation staff and evaluation consultants to try and untangle the problem and lift up ways the challenge could be addressed. Real constraints exist for professionals both inside and outside of foundations—including limited resources, staff capacity and turnover, competing priorities, and different experiences and expectations around evaluation. Yet the urgency of the social problems and inequities philanthropy seeks to address mean it is not good enough for those within and outside of foundations to try slowly and independently to make change around evaluation use.

Working with 20 Action Team members across three sessions, we explored success cases of evaluation use, identified some of the unique issues facing those inside and outside of foundations, and thought "outside the box" for a range of creative, unique ways to better apply evaluation to foundation strategy.[4]

[4] We are extremely grateful for the engagement of many individuals in this effort at different points in time. A full list of Action Team members can be found at the end of this piece. Many participated in sessions at AEA, talked to colleagues to collect data for the process, and completed a survey or otherwise provided feedback that greatly strengthened this work.

Six Areas for Focus and Change

What will it take to make evaluations more useful for foundation strategy and practice? In our conversations, the following six areas rose to the top as key interventions to change the way the systems of evaluation and philanthropy operate:

1. **Know What You Don't Know About Each Other (and Learn More)**
2. **Get Clarity on How Decisions are Made and Where the Decision Points Are**
3. **Match What Decision-makers Need to Know with the Questions that Drive the Evaluation**
4. **Explicitly Link Evaluation to Equity and Ensure It Advances Equity Work**
5. **Embrace and Manage Tensions**
6. **Wrap Up by Building Ownership for Evaluation Findings**

For each area, we outline the implications for increasing the utility of evaluation findings, as well as some specific ways that external evaluation consultants and internal foundation evaluation staff can act together and in their own spheres of influence.

We are not expecting that all these actions can be done completely or at once. Instead, we hope to provide some new ideas along with reminders of things that can be strengthened or brought back into focus. By acting on these ideas, evaluators and foundation evaluation staff can make good on our intention for evaluation to contribute strongly to positive, equitable social change.

How can I start to make changes?

For work in progress: Some of the focus areas are specific to a phase of an evaluation project. Think about a team or project for which there might be a ripe opportunity to change things. Perhaps it's a team that already has a strong culture of learning. Perhaps you could identify a relationship within which you could start a conversation about testing a new practice or idea. For a specific project, try the following: Look at the list of eight areas for change and pick one that is most salient to the stage of the work and the context you find yourself in. Is there one thing from the list of ideas you could experiment with now? Does the list of suggestions spark an idea of something new you could try that is related to that area of focus and change?

For more forward-looking work: Is there a focus area that really speaks to you? Can you build in activities related to that in your next RFP, scope of work, or project that would give you an opportunity to try something new?

Over time: As you take on new activities and practices, how can you learn and refine? What new things can you add as other activities become more routine? Can you develop accountability buddies with other consultants or colleagues who are similarly trying out new things? Can you blog/speak/share your lessons to help the field advance more quickly?

To see improvements at a field level, it will take multiple actions by many different actors. Start trying things now!

1. Know What You Don't Know About Each Other (and Learn More)

Even as the philanthropic and evaluation fields increasingly engage with one another, not all external evaluators have a deep understanding of how philanthropy works: its priorities, incentives, and operations. At the same time, not all foundation program staff are well-versed in the functions of measurement and evaluation and the types of questions evaluations can answer. Addressing some of these foundational gaps in knowledge and facilitating opportunities to learn more about each other's work would help each party better understand the other and provide a more solid footing for collaboration.

While some of this is technical and tactical, i.e., learning more about our respective sectors, there is a fundamental relational aspect to this as well. Having partners who can serve as "critical friends" inherently requires some friendship: a relationship built on mutual respect and regard, meaningfully different than the traditional vendor/contractor relationship.[5] We believe that when funders and evaluators collaborate with honesty and openness, greater clarity about where we have and don't have power, and owning our individual, organizational, and professional spheres of influence, we tap into a deep well of potential for meaningful evaluation work.

Evaluation consultants can:

- Take the time and initiative to build capacity around the fundamentals of philanthropy generally, through background research, talking to others in the field, and seeking out relevant professional development.
- Be willing to ask more upfront questions about how a foundation partner works, because as the saying goes, "when you've met one foundation, you've met one foundation." Ask about the foundation's history, founding, theory of philanthropy (which may be unstated), processes for strategy development and decisions, history with evaluation and learning, risk tolerance, orientation to evidence, and timeline of recent strategy decisions. Clarify how these characteristics may differ across project areas at larger foundation.
- Find ways to help foundation staff become a more informed consumers of evaluation. This could be through materials or trainings tailored to foundation staff to help them better understand measurement and evaluation (an Evaluation 101) or explaining options and tradeoffs throughout the evaluation engagement.
- Learn how foundation evaluation staff are trying to build culture around learning and evaluation and consider how to contribute to that vision through the work.

[5] Julia Coffman laid out a similar issue here: https://medium.com/@jcoffman/funders-are-from-mars-evaluation-consultants-are-from-venus-dedcc4c2b614
[6] Currently, there is a dearth of relevant professional development experiences in this area. We hope that will continue to change.

Foundation evaluation staff can:

- Provide orientation for program officers around measurement and evaluation. If evaluation is already part of program officer onboarding, consider other ways to reinforce some of the basics over time that provide information on some of the tactical aspects of evaluation engagements, but also some of the ethical and non-technical components such as principles for inquiry, and personal feelings and experiences with data, learning, and accountability.
- Orient external evaluators to some of the basics of philanthropy at the foundation in initial conversations. Provide key information about organizational context, priorities, and approaches, whether requested or not. Be clear about how best to partner with the foundation in this work, including time and resource availability, and possible minefields and obstacles that may be encountered in the course of the engagement.
- Consider hosting a meeting with consultants working on different foundation evaluations to share common information and provide a venue for them to share lessons learned about how to be effective in a specific foundation's context.

2. Get Clarity on How Decisions are Made and Where the Decision Points Are

Often, evaluation fails to find its way into decision-making because of a lack of clarity around which decisions are being made, when, how, and by whom. This can be true for big decisions, like stopping something or starting something, but also for other decisions, reactions, or changes that are being made along the way. Increasing the usefulness of evaluation for strategy and practice means providing the right insights at the right time and to the right people—so getting clear on the decisions that evaluation can feed into, and the pressures facing foundation staff as they make these decisions, is vital to the task of making evaluation meaningful and actionable.

Evaluation consultants can:

- Take time upfront to clarify what decisions the evaluation will support, when information is needed, and who is invested in it. Include decision makers who may not be involved in the evaluation directly. Use this information to guide the design of the evaluation, the questions it asks, and the timeline it is carried out on.
- Frame evaluation findings in a way that actively supports decision-making: tee up information that is actionable, be clear about trade-offs, lay out any tensions that will need to be wrestled with, and provide questions that will help lead to action in the strategy.
- Work with foundation evaluators and other staff to understand the competing demands and many different sources of information that staff face when making decisions, and make sure the information provided is additive and complementary to avoid information overload and best use limited resources.

- Establish early on what products are going to be most useful to support decisions; for example, instead of a full report, a memo or a slide deck might be of more value.
- Develop or provide skills to support or facilitate the use of evaluation and other information to inform decision-making, such as emergent learning techniques or the use of other decision-making tools, like decision inventories.[7]

Foundation evaluation staff can:

- Be honest and transparent with evaluators about what can change in the strategy and what can't.
- Make sure RFPs are directly responsive to decisions being made and are asking questions and providing timelines that align with decision-making needs. Alternatively, make sure these considerations can be addressed upfront by building in time for a period of discovery with the evaluation to ensure clarity and alignment from the outset.
- Regularly bring evaluators in early and share decision-making timelines, so that everyone knows when data will be needed or plan strategic decisions around the evaluation timeline, so that decisions are aligned with availability of the best data. Since foundations routinely start making decisions before a current strategy is complete, consider how to connect to those timelines.
- Identify and share the expectations of foundation staff and leadership on evaluation products and content, and supply external evaluators with context on the other types of information that decisionmakers will engage with (e.g., research or products by grantees, other consultants, or partners), so that they can think proactively about how their findings will intersect (e.g., be additive or contradict; shared before, with, or after, etc.).
- Think broadly about who should be involved in decisions and help them engage with and understand the evaluation and its findings. This could include decision-makers, but might also be those who advise or otherwise influence decisions. If they can't be in the room themselves, make sure their perspectives are represented and that the most critical information makes its way back to them.
- Support the creation of learning logs.[8] Work with program staff and other relevant foundation staff to document what learning is happening, capture when and why particular decisions were made, and outline which evaluation evidence contributed to those decisions and how.

[7] Tanya Beer, Julia Coffman and Ian David Moss, "Smart Decision-Making," *Center for Evaluation Innovation*, March 2020.
[8] Marilyn Darling, Heidi Gruber, Jillaine Smith and James Stiles, "Emergent Learning: A Framework for Whole-System Strategy, Learning, and Adaptation," *The Foundation Review*, March 2016, https://doi.org/10.9707/1944-5660.1284

3. Match What Decision-makers Need to Know with the Questions that Drive the Evaluation

Not all questions are equal in their ability to produce information that will support decisions. Questions like "are we making progress?" don't tell you much about what to do if you're not seeing progress. Is the lack of progress an implementation problem, strategy problem, or something else? Similarly, evaluations that seek to capture retrospective lessons about completed strategies have their place, but they are also unlikely to clearly drive decisions for tomorrow. More can be done to ensure use of evaluation for decisions by carefully considering the questions being addressed and aligning with desired decision-making.

Evaluation consultants can:

- Facilitate design processes which lift up questions relevant to what foundation strategists need to know. To what degree do questions answer "what, so what, and now what" questions?
- Uncover early on where there are points of uncertainty in strategies, and make sure that the evaluation is directly asking questions that will help shed light on these areas—rather than confirming what staff think they know.
- Be willing to ask questions that more directly challenge foundations' internal dogma, gaps in strategy, or areas of potential inequity, to produce more meaningful and important findings.
- Promote asking questions that address single- and double-loop learning. Single loop questions ask: did this work? Double loop questions ask: was it the right thing to do? Interrogating what else could have been done or how results could be stronger or more equitable can drive better decisions in the future.
- Be more transparent about what is and isn't possible in terms of the questions that can be answered, the time and resources needed to do the work well, the strengths and limitations of different evaluation approaches, and what end products are most relevant.
- Be clear upfront when a full evaluation isn't necessary, and something more focused or limited would be most helpful in terms of constrained time and resources.

Foundation evaluation staff can:

- Help staff craft questions for RFPs or other project requests that ask questions that align with the recommendations above.
- Support staff in crafting RFPs that have the right number of evaluation questions to address given the evaluation's timeframe and budget.
- Build in time and budget for evaluators to suggest additional or different questions from the ones proposed in the RFP. Promote more transparency with evaluators around the program strategy and investments and the purpose of the evaluation—including what's motivating it, e.g., is it a foundation requirement, a proactive desire to adapt, or something else?

- Help staff better envision the results from different types of questions, so they can make more informed choices about where to focus their time, energy, and budgets within an evaluation.
- Push staff to be more rigorous in their thinking and products related to theories of change and evaluation questions asked. Encourage them to think of evaluators as critical friends.
- Be clear about what opportunities or limitations exist for involvement and engagement with stakeholders, such as grantee partners and communities, and how access will be mediated. Work to build cultures that foster more curiosity and openness to learning—including from failure—and that see evaluation as a tool for learning, not just accountability.

4. Explicitly Link Evaluation to Equity and Ensure it Advances Equity Work

If evaluation is going to help drive better decisions in foundations, evaluators should realize the opportunity to drive decisions that result in more equity. While organizations may be in different places on their own work around race, privilege, and power, we believe that strategies and evaluation must consider issues of equity if meaningful, sustainable progress is to be seen toward foundation missions.

As laid out in the second principle proposed by the Equitable Evaluation Initiative, evaluative work can and should answer critical questions about the ways in which historical and structural decisions have contributed to the condition to be addressed, the effect of a strategy on different populations, the effect of a strategy on the underlying systemic drivers of inequity, and ways in which cultural context is tangled up in both the structural conditions and the change initiative itself. More consistent use of equitable evaluation and other related principles will help drive evaluation-informed decisions that can result in equitable impact.

Evaluation consultants can:

- Build skills in equitable evaluation and culturally responsive evaluation, and through organizational work, address issues of diversity, inclusivity, and equity. Seek out trainings, articles, or other venues for building competence.
- Push to embed equity in the work through the questions addressed, the methods proposed, who holds power, how analysis occurs, and more.
- Raise up considerations and issues that may get in the way of clients making progress towards equitable outcomes.

Foundation evaluation staff can:

- Promote equitable evaluation principles internally.
- Build in questions, timelines, budgets, and products that share power and support implementation of culturally responsive practices. These practices can include ensuring there are resources for honoraria for participating stakeholders, timelines that allow for engagement with affected communities to help identify and prioritize questions, processes that support shared sensemaking, resources for creating alternative products besides foundation-focused reports, etc.

- Build internal appetite and demand for equity considerations and approaches within evaluation. Ensure those whose work the evaluation focuses on are included in all elements of the evaluation from the design and implementation, to reflection on findings and their application.

5. Embrace and Manage Tensions

There are always tensions to balance in evaluation and strategy work: between wanting to be planful and use best practices and the frequent need for flexibility to change course; between the function of evaluation as a tool for learning and its role in promoting accountability; and in the push and pull between wanting an evaluator to get to know your organization and strategy well enough to be a useful partner in real-time, and wanting evaluators to stay more "objective." These are often not problems to be solved, but opposing forces that must be managed, to best realize the "upsides" and minimize the "downsides."[9] Both evaluators and foundation staff must acknowledge these tensions, and find ways to manage them throughout the evaluation.

Evaluation consultants can:

- Learn to name, identify, and communicate about tensions clearly, so that clear-eyed choices can be made. Tools like polarity mapping and duality mapping can help.[10]
- Build in time with foundation staff to periodically name, reflect on, and manage tensions arising in or from the evaluation, at the minimum taking time at the beginning, middle, and end of an engagement to do this work.

Foundation evaluation staff can:

- Inform evaluators about the ways the foundation views the trade-offs inherent in these tensions.
- Help communicate and manage evaluation-related polarities with program staff and leadership to support their effective management over time.

[9] "Are You Facing a Problem? Or a Polarity?" *Center for Creative Leadership*.
[10] "How to Manage Paradox" *Center for Creative Leadership*. https://www.ccl.org/articles/leading-effectively-articles/manage-paradox-for-better-performance/

6. Wrap Up by Building Ownership for Evaluation Findings

Too often, evaluation engagements are viewed as complete when data has been collected, analyzed, and synthesized and a product is submitted. For findings to inform strategy and practice, program staff at foundations need to use evaluation findings to inform their work. Using the findings to inform work is less likely to happen if staff don't feel a sense of ownership over the results, which can occur if they don't feel like they played a role in defining the questions, they don't understand or know where the data came from or the methods by which it was acquired, or they don't feel confident in interpreting the findings, applying them to their work, or presenting them to others. There are opportunities to build ownership and promote follow-up and use through all stages of the evaluative process.

Evaluation consultants can:

- Build in multiple, ongoing check-ins with program staff, from establishing the purpose of the evaluation, to its design and data collection, to periodic opportunities to share and reflect on results.
- During check-ins, encourage program staff to share their understandings of the findings and articulate their take-aways and the implications for strategy.
- Build time into the scope and project plan to digest findings with clients, present considerations, and support use—this may include facilitated review of findings, strategic debriefs, learning circles, or other techniques for meaning making, answering questions, and promoting use.
- Provide materials, resources, and time to support program staff in presenting results to different audiences (e.g., grantees, communities, or foundation leadership) and being prepared to answer questions (e.g., talking points, back pocket FAQs).
- Plan for deliverables that facilitate the use of findings, such as an implementation plan which clearly outlines next steps and roles associated with follow-up actions for program staff.

Foundation evaluation staff can:

- Act as a bridge-builder between program staff and external evaluators, helping to make sure that both are involved in relevant conversations through the design and interpretation processes.
- Provide different models of how evaluation has looked within the foundation, including highlighting examples of success and past challenges.
- Help make a clearer link between an evaluation and next steps in internal strategy processes.
- Create and ensure use of internal tools that foster reflection and use for teams, such as Before and After Action Reviews, Emergent Learning Tables, or other intentional learning techniques.[11]

[11] Hallie Preskill, Efraín Gutiérrez, and Katelyn Mack, "Facilitating Intentional Group Learning: A Practical Guide to 21 Learning Activities," *FSG*, January 2017.

- Build internal processes to hold staff accountable for using evaluation findings to inform their work (e.g., annual planning processes in which program staff need to discuss what they learned from evaluations and how that impacts the following year's work including budget and staffing requests).
- Promote more active sharing of what program staff are taking away from the evaluation and what actions they intend to take, sharing with grantees, partners, and others who have taken the time to participate in the evaluation.
- Build in active, intentional, and funded efforts to address dissemination, field use, field understanding, and uptake to make sure that the evaluation findings are additive, contributing to knowledge, and available and accessible for use by others.
- Consider ways to make evaluation results useful to others within the foundation. Support the creation of evaluation products, such as presentations, one-pagers, or infographics, that extend beyond the needs of the program in question and include this in the framing of evaluation questions and deliverables in RFPs. Internally, create memos that can make the link to other organizational priorities, or areas of focus or host learning events with other program staff that can broaden the learning and use beyond a specific team and project.

Beyond Individual Projects and Relationships

As noted in the introduction, improving the use of evaluation findings isn't solely an issue that can be solved by strengthening the practices of individual evaluators, or within individual contracts, projects, or institutions. While the suggestions above can be taken on by individual evaluation consultants and foundation evaluation staff, more could be done at a field level to help advance practices that will result in more evaluations yielding meaningful insights to support decisions and actions by foundations. While this was not a focused area of inquiry within our Action Team, we share some ideas for further development.

- **Deeper and more shared vision.** Early on, evaluators and foundation evaluation staff who were members of this Action Team found themselves seeking greater clarity about what it could and would look like to have more evaluations that support foundation strategy and practice. Field pieces that articulate shared principles and examples of when this has worked well could help drive organizational culture change, which could create a stronger set of operating conditions for evaluators and foundation evaluation staff.
- **More field level learning supports.** While evaluators and foundation evaluation staff can do more to help others have stronger base knowledge about philanthropy and measurement and evaluation, these could be more efficiently and effectively done at a field level. How can sector serving groups, like the American Evaluation Association, Grantmakers for Effective Organizations, or others provide more information, training, and/or professional development around these topics?
- **More cross-sector learning.** While some efforts have been made to promote learning across foundation evaluation staff and external evaluators, much of the sector conversation, especially for philanthropy, continues to be insular and siloed. For greater relevance and use of products, and stronger partnerships "across the aisle", more opportunities for learning together would help. Alternatively, new communities of practice or convenings could be created to help promote action to increase the utility of evaluation for philanthropy.

Summary: Six Areas for Focus and Change

To Make Evaluations More Useful for Foundations in Strategy and Practice

	Evaluators	*Funders*
Know What You Don't Know About Each Other (and Learn More)	• Build staff capacity on the fundamentals of philanthropy • Ask how your foundation partner works internally • Help foundation partners be more informed consumers of evaluation • Learn how foundation evaluation staff are building culture around learning and evaluation	• Orient program officers to measurement and evaluation • Orient external evaluators to your internal context • Host group meetings with evaluators working on different foundation engagements to share common information
Get Clarity on How Decisions are Made and Where the Decision Points Are	• Clarify the decisions evaluation will support, when information is needed, and who is invested in it • Frame findings in ways that actively support decision-making • Understand competing internal demands at the foundation • Consider alternatives to reports: memo, slide decks	• Be honest about what can change and what can't • Be sure RFPs questions and timelines align with decision-making needs • Share timelines with evaluators • Identify and share expectations • Involve and engage internal decision-makers and influencers in evaluation findings • Create learning logs and other documentation
Match What Decision-makers Need to Know with the Questions that Drive the Evaluation	• Facilitate design processes that focus on key questions • Uncover points of uncertainty and make sure the evaluation is shedding light • Ask questions that challenge the foundations's assumptions, gaps in strategy, and/or areas of potential inequity • Ask questions that address single- and double-loop learning • Be transparent about time and resources needed, the limitations of evaluation, and relevant end products	• Help craft RFP questions that align with recommendations for evaluators above • Support crafting RFPs that ask the right number of questions in relation to timeframe and budget • Build in time and budget to suggest new or different questions • Help staff envision the results from different types of questions • Push staff to think of evaluators as critical friends • Foster a culture that sees evaluation as a tool for learning and not just accountability
Explicitly Link Evaluation to Equity and Ensure It Advances Equity Work	• Build skills in equitable and culturally responsive evaluation • Embed equity through evaluation questions, methods, power dynamics, analysis and more • Raise considerations and issues regarding equitable outcomes	• Promote equitable evaluation principles internally • Build in questions, timelines, and budgets that share power and implement culturally responsive practices. • Build internal appetite and demand for equity consideration and approaches in evaluation.
Embrace and Manage Tensions	• Learn to name, identify, and communicate about tensions, using tools like polarity and duality mapping • Build in time to name, reflect on, and manage tensions arising in or from the evaluation	• Inform evaluators about ways the foundation views trade-offs inherent in these tensions • Communicate and manage internal evaluation-related polarities
Wrap Up by Building Ownership for Evaluation Findings	• Build in multiple check-ins with program staff • In check-ins, encourage program staff to articulate implications for strategy • Build in time to digest findings with clients and support use • Provide materials, resources, and time to help program staff present findings to different audiences. • Plan for deliverables that facilitate the use of findings, such as an implementation plan	• Build processes that hold staff accountable for using findings to inform their work • Promote active sharing of takeaways and next steps with evaluation participants • Build in active, intentional, and funded efforts to disseminate findings • Consider creating products such as presentations, one-pagers, memos, or infographics that can help make evaluation results useful to others across the foundation

Now What?

Not every evaluation must lead to a specific decision or action. Yet if the value proposition for evaluation and learning in foundations is at least in part that it will drive better results, having evaluations result in meaningful insights cannot continue to be one of the greatest challenges foundation evaluation staff face.

We hope this piece can help evaluators and evaluation staff move from good intentions to new actions: starting new or different conversations, trying new techniques or approaches, and fostering continued innovation in the field. Doing so can help us all better realize the potential for evaluation to help drive equitable social change.

Postscript

Throughout this process we sought to build from the experiences of those who had chosen to participate in this Action Team: what had they seen, experienced, or heard about that we could share back to the field so that we might accelerate progress in this area.

The process inherently places our thinking in the constraints of what we know, the current system, and our current context. To spur some breakthrough thinking, we also did an exercise with a set of oblique strategy prompts. While they didn't lend themselves to neat focus areas and proven potential actions, we think they could elucidate new and fresh ways of thinking about how to address this issue. For more ideas and inspiration, check out our blog that gives more background and the results of this exercise.

Acknowledgements

We're grateful to the Engage R+D and Equal Measure staff and leaders for helping to shepherd this network to address some real issues hampering our field.

We wouldn't be where we are today without the engagement of many different evaluators and foundation staff who agreed to participate in our Action Team, and contributed their time and ideas to the process through online and in-person discussions, and through providing comments on various versions of this brief.

We are grateful to the Strategy & Practice Action Team and others who provided input into this brief:

Shanesha Brooks-Tatum, Creative Research Solutions
Imee Cambronero, Minneapolis Foundation
Verenice Chavoya-Perez, Social Policy Research Associates
Julia Coffman, Center for Evaluation Innovation
Anna Cruz, Kresge Foundation
Kathleen Lis Dean, Saint Luke's Foundation
Avery Eenigenburg, Ralph C. Wilson, Jr Foundation
Brett Hembree, Kauffman Foundation
Tom Kelly, Hawaii Community Foundation
Meredith Kruger Kos, General Mills
Stephanie Lerner, The Barra Foundation
Albertina Lopez, Center for Evaluation Innovation
Samantha Matlin, Scattergood Foundation
Johanna Morariu, Walton Family Foundation
Ian David Moss, Independent Consultant
Jeff Poirier, Annie E. Casey Foundation
Hallie Preskill, FSG
Gabriel Rhoads, Project Evident
Lauren Sauer, RED-F
Trilby Smith, Vancouver Foundation
Casey White, Bill & Melinda Gates Foundation

We could not be more fortunate for this help. At the same time, we take full responsibility for this piece and its content.