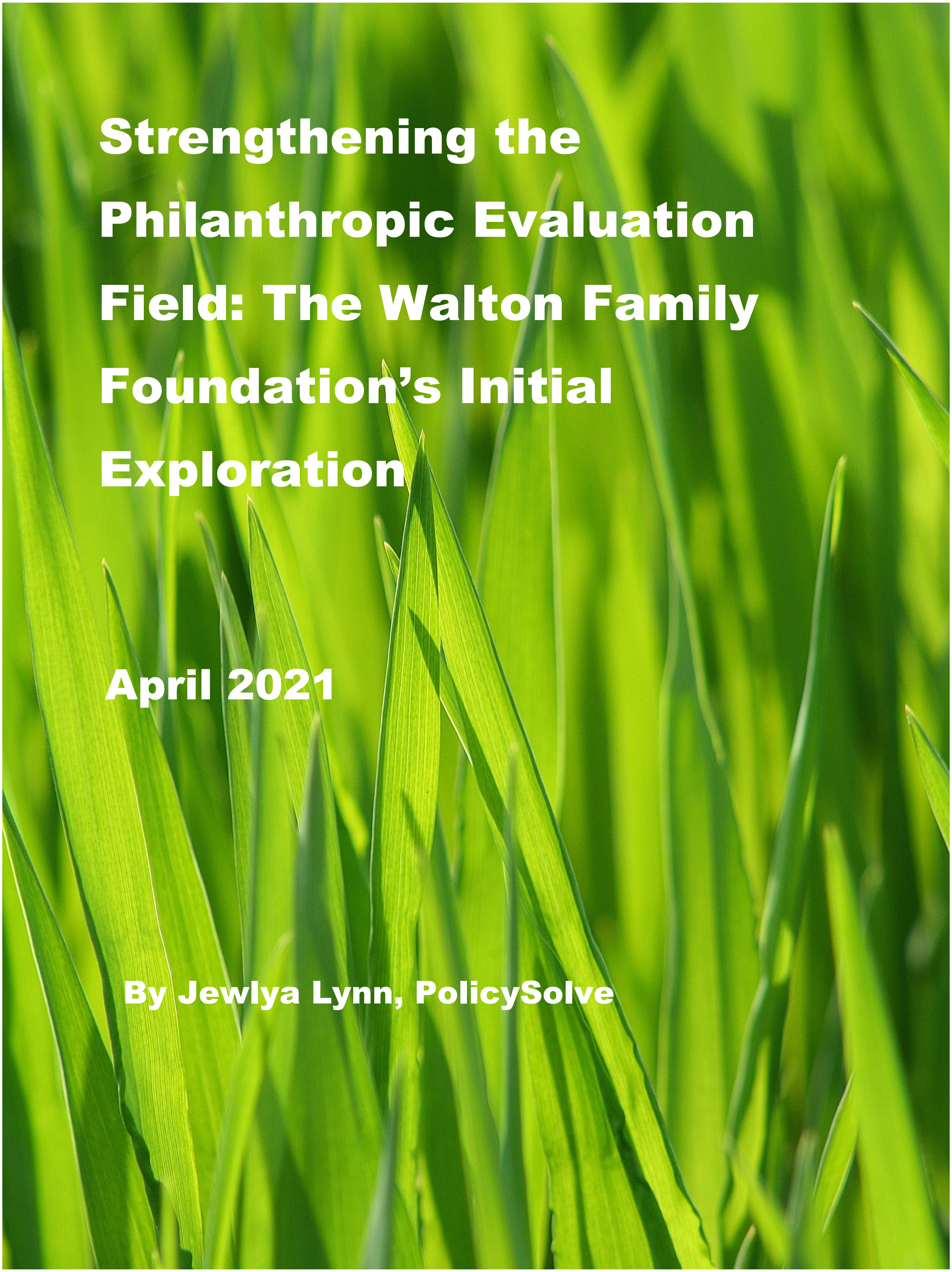

Strengthening the Philanthropic Evaluation Field: The Walton Family Foundation's Initial Exploration

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Table of Contents

Executive Summary

In early 2021, the Walton Family Foundation (WFF) Strategy, Learning and Evaluation Department (SLED) undertook a team-based process of identifying areas of the larger philanthropic evaluation field that WFF can (1) support; (2) learn from; and (3) provide some level of leadership to as it develops and strengthens over time. With input from 18 leaders from the philanthropic evaluation field (see the acknowledgements for a list), WFF explored a wide array of topics, identifying two priority areas (below) to focus on in depth, along with other contextual issues and field needs.

Key Findings: Using Evidence to Inform Decisions

Participants widely agreed that this area – Using Evidence to Inform Decisions – is not so much a method or design challenge as a practice challenge. Evaluation has the tools to generate actionable information, but a combination of different factors can lead to a disconnect between evidence and decision-making processes, including:

- Structural aspects within philanthropy (when, where, and by whom decisions are made; the influence of evaluators in those settings; the skills of program staff to translate evaluation information; etc.);
- Lack of clear definition of both evidence and decision-points, including whether smaller or more tactical decision-points are included; and
- Recognizing that program officers have their own expertise, mental models, access to information, and knowledgeable peer groups – in other words, sources of evidence that do not depend on evaluators' inputs.

This is also not a topic that lacks attention and efforts to address the problem – in fact, the last decade has seen the development of many resources, tools, practices, and processes to increase learning and use of evidence in philanthropy. More recently, case studies, tools, and thought pieces have also sought to address the complexity of learning related to equity, racial equity, and engaging communities in learning.

Key Findings: Measuring Causality in Complex Systems

Participants' discussion points revealed many concerns about the use of causal information that may be more tied to the history of how it has been used in evaluation (experimental and quasi-experimental designs) than how current methods can be used. For example, they were concerned about whether causal analysis can be forward looking, attend to more than just the direct impact of a philanthropic strategy, and be implemented in ways that advance equity. These are issues that are central to the field right now for more than just causal designs, as there are active conversations around how to redefine rigor and rethink evidence and validity in order to center many different ways of knowing. Many discussion group participants were less familiar with some of the newer methods in philanthropic evaluation that are effective in the context of complexity, address some of these concerns about appropriateness, and yet still help to answer causal questions.

While these newer methods (e.g., outcome harvesting, most significant change, causal link monitoring, etc.) can be implemented to address their concerns, many of the methods are not currently designed, implemented, and/or documented in ways that assure a rigorous analysis of causality and/or directly address equity issues in both the practice of the method and its findings. This may be a place where additional work is needed within the context of already promising evaluation practices.

Key Findings: Larger Context

Participants also identified a variety of contextual issues that will influence any work on the two priority issues, and are larger field building needs themselves, including:

- Meeting the current moment, as philanthropy begins to recognize its role in addressing racial discrimination and shifts its practices to more trust-based philanthropy models;
- Addressing diversity, equity, and inclusion in the evaluation field, including the systemic drivers of inequity;
- Recognizing broader social narratives about the legitimacy of both the philanthropic and evaluation fields;
- Perceived declines in the influence of evaluators;
- The siloing of fields that could (and perhaps should) be learning from each other, including philanthropy, evaluation, academia, and local communities; and
- The significant gaps in skills that evaluators must address in order to better support strategy work, including efforts to create value in complex systems.

Key Findings: Potential First Steps & Partners

Participants in the discussion groups brainstormed a variety of first steps, from convenings and support to existing learning spaces to training to resourcing studies, publications, and knowledge dissemination. They identified multiple organizations well positioned to help with this work, including the Hewlett Foundation, Funder Evaluator Affinity Network, Center for Evaluation Innovation, Evaluation Roundtable, Center for the Study of Social Policy, Project Evident, and Tamarack Institute.

Conclusion

In general, the biggest theme across both of these potential priority areas for field building was that the barriers are less about the evaluators' methods, tools, and processes. Rather, there are norms, decision-making processes, expectations, assumptions, credibility of evidence issues, visibility and understanding, and gaps in expertise that inhibit evidence use in decision-making (including causal evidence). These are not insurmountable problems, but must be tackled in a way that is congruent with the larger issues facing the field, including an increasing interest in and transition to trust-based philanthropy models, commitment to equity and culturally responsive approaches, and shifting norms around how evaluation influences decision-making in many philanthropic settings. They are also not new problems, which means that the work to advance the field on both priority areas can be grounded in efforts, organizations, and leading individuals already seeking to advance the field on these topics and in related areas.

Introduction & Purpose

In early 2021, as part of a larger organization-wide strategic planning process, the Walton Family Foundation (WFF) Strategy, Learning and Evaluation Department (SLED) undertook a team-based process of identifying areas of the larger philanthropic evaluation field that WFF can (1) support; (2) learn from; and (3) provide some level of leadership to as it develops and strengthens over time. Multiple topics were explored internally and then with 18 leaders from the philanthropic evaluation field (see the acknowledgements for a list), including both evaluators (within and outside of philanthropic organizations) and program staff who commission and utilize evaluations. These discussions focused on two initial topics (below) but also expanded to explore other topics identified by participants.

- Measuring causality in complex systems; and
- Strengthening the use of evidence in decision-making.

The exploration below highlights the main themes on the first two topics from the discussions with field building leaders (listed in the acknowledgements on the previous page), along with additional context about the issues facing the philanthropic evaluation field; potential partners and model organizations to learn from; potential first actions; and other issues that need attention in the field. Some additional insights are included from a light touch review of documentation of how these priority topics are being discussed in the public facing literature from the philanthropic evaluation field (e.g., blogs, articles, and reports).

Findings from the Discussions with Field Leaders

Using Evidence to Inform Decisions

From the discussion with field leaders, it was clear that the topic (using evidence to inform decisions) resonated – they recognize and see in their own work and the field at large the ongoing challenge of using a variety of types of evidence, including systematically collected evidence from evaluations and studies, to inform philanthropic decision-making. Participants widely agreed that it is not so much a method or design challenge as a practice challenge. Evaluation has the tools to generate actionable information, but a combination of different factors can lead to a disconnect between the evidence and the decision-making processes.

Some of the disconnects have to do with larger structural aspects within philanthropic settings, including that:

- Internal decision-making structures can limit opportunities for evidence to be used, particularly at the board or leadership level (this is complicated by the fact that the value of the work may be hard to see when methods aren't well understood at these levels);
- Program officers have many different sources of evidence and information beyond evaluative and research findings. They are experts in their own right, with mental models, peer networks, and other ways of pursuing insights to inform their decisions;
- Evaluators may not always be seen as particularly influential or credible sources of insight, for reasons that can range from a lack of content knowledge to misunderstandings about the intent and purpose of evaluation projects;

- The connection between strategy and evaluation is sometimes weak, driven by a disconnect in the timing and content of evaluation results compared to decision needs, and a lack of understanding by many evaluators of how strategy processes work and when their evidence may be most useful; and
- The dynamics of the program team making decisions can also function as either an enabler or barrier to evidence use, including whether the team has embedded learning processes, are able to articulate their evidence needs sufficiently in advance of decisions for research and evaluation to be conducted, and have experience and comfort utilizing disconfirming information.

Beyond these significant disconnects, there is a basic need to consider and define what the field means when it talks about two key terms:

- Evidence: What counts as "evidence"? How can evidence be defined inclusively and avoid the exclusionary and harmful ways in which certain aspects of evidence have been defined in the past?
- Decision-points: What decision-points does evaluation seek to inform? Whose decision-points? Often, the default is to assume the evaluation should inform the major, strategic decision points (e.g., adoption of a strategy by the board), but will it make more of a difference during the many smaller decision points that are part of strategy design and implementation?

These are not new questions for the field. Over the last decade, an active discussion about what it looks like to embed strategic learning, learning agendas, emergent learning, and other learning practices has explored these same questions. For example, a 2011 piece by Julia Coffman and Tanya Beer[1] used different jargon (the "strategic learning" frame) to talk about the same issues:

> "The implication here is that strategic learning is not just about evaluation and how evaluation is positioned. Although evaluators have a key role to play, so do programmatic staff and leaders who determine when and how strategy is planned, executed, and adjusted. Evaluators may answer the questions, but it is these staff and leaders who ask them—framing the questions of what they need to know to be more effective."

Leaders in this space (including many in the field leader discussions described here) have focused in the last decade on strengthening the philanthropic practice of learning, including seeking to define what a learning habit looks like within philanthropy,[2] how learning practices can help support the continuous improvement of strategies,[3] and even assessing the impact of using learning agendas collaboratively between funders and grantees,[4] among other learning topics. Some of these pieces have explicitly explored what types of evidence are important, including talking about the role of "robust data"[5] and many pieces acknowledge how conventional program evaluation doesn't always meet the rapid decision-making needs of adaptive, systems focused strategies.[6] Multiple efforts have tried to understand how program officers use evidence, including benchmarking data from the Evaluation Roundtable gathered in 2012[7] and more recent efforts by the Hewlett Foundation's Knowledge for Better Philanthropy Initiative.[8] Some have gone further to look at how philanthropic organizations structure their learning capacities, including how to address cultural shifts associated with becoming better strategic learners.[9] Case studies have tackled some of the structural disconnects between boards and strategy, such as describing the ways in which boards have become involved in the learning process, e.g. learning from and with communities and being asked to engage in learning dialogues instead of reacting to presentations of summative results.[10] Many of these often cited thought pieces published in widely read journals like the Foundation Review were written by the same small group of evaluators and learning partners, a group that lacks diversity in many different ways.

Across these early articles, much of the writing focused on what participants in the discussion groups identified as the bigger strategic decisions (e.g., design and adoption of a strategy, major adaptations to the strategy). Some articles also included learning about the larger systems context, but few explore how to engage in learning around tactical and smaller decisions made along the way. A few pieces explicitly acknowledge the role of learning in the context of these decisions,[11] even as the learning model described remains focused the larger strategic decisions.

Notably, despite this depth of work, field building leaders in the discussions clearly saw many remaining challenges and needs, and did not describe the philanthropic evaluation field as one that had solved the rather perineal problem of how research can inform decisions and action. This may be part because of how the philanthropic evaluation field appears to have split off into a variety of directions when it comes to how to integrate evidence into decision-making. In practice, this may mean that each evaluator/learning partner is bringing a distinct set of approaches and language, some of which may build on and be complementary to each other, but others of which may have conflicting practices and expectations of the philanthropic partners and how they engage. Discussion participants emphasized that the problem facing the field at this point is not a problem of needing new methods or tools, so much as one of shifting norms, expectations, alignment, structural issues, and individual, team, and organizational dynamics.

Measuring Causality in Complex Systems

The 18 field building leaders approached the issue of causal analysis in complex systems with hesitancy, sometimes articulating arguments for why it was important even as they expressed concerns about how to act on this need. It was evident that many brought less personal expertise and experience to this topic and often when they were more familiar with the topic, it was through experience with Randomized Control Trials, and less exposure to alternative or more appropriate methods for measuring causality amid complexity.

Participants' discussion points revealed many concerns about the use of causal information that may be more tied to the history of how it has been used in evaluation than how current methods can be used, with the focus on experimental and quasi-experimental design. For example:

- Some participants were concerned that causal analysis is overly focused on the philanthropic strategy itself and its impact. While this is a design choice that can be made, methods like outcome harvesting, process tracing, and contribution analysis do not have to be focused on a change the philanthropic institution sought to achieve, and can and often are deployed in ways that explicitly look for disconfirming evidence along with evidence of how the strategy itself contributed.
- Other participants were concerned that causal analysis may not be relevant to future decision-making, as it looks backwards too much. Again, this may come from familiarity with methods that can take a long-time to deploy, tend to depend on fairly controlled circumstances, and generate findings summatively more than steadily. Other, newer methods can be deployed more rapidly, iteratively, and even in real-time.

There was some agreement that philanthropy could benefit from testing its "good intentions" about pathways to change through causal analysis, and a warning that some philanthropic partners may find disconfirming evidence difficult to incorporate into their mental models.

Generally, participants saw a link between casual analysis and equity, particularly around the notion of helping to test pathways the philanthropic strategy assumes as the right ones. However, they cautioned that causal analysis must be conducted appropriately so as not to be harmful in its process or findings, which includes being implemented in a participatory manner. One participant also expressed the view that the methods of causal analysis (and particularly the methods used historically) are rooted in white supremacy, which makes them problematic to deploy. This is an important reminder of the tension between using a method to advance equity while also confronting its historical origins and the ways the methods have been used intentionally and unintentionally to harm people of color and others. Without addressing the origins of methods and the assumptions underlying them (such as what counts as "evidence"), it can be difficult (if not impossible) to support efforts to dismantle structural racism, seek justice, or otherwise address inequities.[12]

The participants' hesitancy on causal analysis is also seen by others in the field. For example, Rick Davies recently argued in an American Evaluation Association blog that causal analysis is overly emphasized in impact evaluations, and encouraged a wide perspective that looks at things like valuation, predicting, explanation, and descriptions.[13] Other recent promotion of causal analysis, such as a Stanford Social Innovation Review webinar by Susan Athey,[14] offered evidence of the continued emphasis on quasi-experimental designs, despite the difficulty of using them in complex, dynamic systems.

Though not specific to causal analysis, there is a broader critique underway of the methods of evaluation (well-articulated by Jara Dean-Coffey[15]), and particularly the definitions of such concepts as valid, rigorous, and objective that are seen in quasi-experimental designs common in causal analysis historically (e.g. randomized control trials). Coming from the philanthropic perspective, Jo Christine Miles made the argument that "centering questions of validity, objectivity, and appropriateness" will not advance equity due to the dated ideas underlying how these concepts are implemented, ideas that can lead to reinforcing the problematic power dynamics that lead to the injustices many foundations seek to address.[16]

Some of the newer or more recently promoted methods that are appropriate for a casual design seek to redefine rigor, approach validity in new ways, are implemented in more participatory ways, and are not grounded in the same history as quasi-experimental designs. They are able to address many of the concerns voiced in the larger field. Other methods, that go beyond the traditional quasi-experimental designs, still have some of the same challenges. Despite this variety of methods, discussion participants largely focused on RCTs and more generally experimental and quasi-experimental approaches. Among the alternatives are:[1]

- Causal link monitoring;
- Causal loop diagramming;
- Collaborative outcomes reporting;
- Collaborative yarning methodology;
- Contribution analysis;
- General elimination methodology;
- Innovation history;
- Most significant change;
- Multiple lines and levels of evidence;
- Outcome harvesting;
- Process tracing;
- Qualitative impact assessment protocol;
- Rapid outcome assessment; and
- Statistically created counterfactuals.

[1] For more about these methods, visit the Better Evaluation website, where many of the methods listed here are identified as methods for assessing causal relationships.

While these methods have potential to meet the need for causal analysis, the implementation of them is not always able to address the types of issues raised in the discussion. In particular:

- Some of these methods are described as providing causal evidence, but can be (and may often be) implemented without the rigor and attention to causal connections needed to validate causality; and
- The methods can be implemented in ways that either harm equity or advance equity, with many of the guiding materials offering relatively little description of how to best advance equity in their design and implementation.

This suggests there is an additional need to ensure the resources that support implementation of causal methods in complex settings are robust on both fronts, helping evaluators and philanthropic partners to trust that the approaches can overcome some of their fears and assumptions.

Relevant Field-Level Context

In addition to insights specific to the two priority areas, the participants brought up a range of other field dynamics that are important to consider.

Meeting the Current Moment

Across both topics, participants reflected on the current moment philanthropy is experiencing, with growing social narratives around the intersection of racial discrimination, equity, and the philanthropic sector, and belief that racial discrimination must be addressed directly within many different social issues. Of course, this disruption goes well beyond philanthropy, and influences from outside the sector are part of the incentive (and one might say, pressure) the sector is experiencing to be bold and shift its practices. This moment of inflection in the field has led to increased interest in trust-based philanthropy models and other ways of devolving power to communities, and a shift in the process of grantmaking.[ii]

Participants noted that it is less clear where evaluation and evidence-generation may fit in as power shifts more to grantees and communities. At minimum, they expect the types of questions being asked will change, and perhaps new methods will be needed. The “client” of the evaluation is likely to change, with more leadership of evaluation focus and implementation from the grantees and communities. For most participants, this shifting dynamic did not change the need for evidence (or casual evidence specifically), but rather complicates it and they wondered whether evaluators will be able to “keep up” with the changes.

This conversation about where data, research, and evaluation fit into this moment of social change is much larger than these small group discussions. In these larger conversations, the democratizing of evidence, the shifting of who has access to and power over data, is central. This can be seen in initiatives like the Data for Black Lives Movement, whose Executive Director, Yeshimabeit Milner, has explained: “In the world we live in, data is destiny. For Black people, who have been disproportionately harmed by data-driven decision-making, this is especially true.”[xvii] Philanthropic evaluation must not only join in this moment of shift, but also connect

[ii] One could argue that philanthropy is experiencing a “liminal” moment. This concept, drawn from anthropology, describes when groups experience ambiguity and disorientation as they transition into a new state. Liminal moments, while often uncomfortable and disruptive, create opportunities for tremendous creativity as institutions become more malleable and new practices, norms, and customs are established. This moment is not unique to philanthropy, and the disruptions of 2020 themselves may be driving many different sectors and parts of society to go through similar reinventions, leading to a moment of broad-reaching creativity and change that can be harnessed for the greater good.

beyond its own boundaries to the leaders in other fields whose insights can help transform the evaluation field.

Addressing Diversity, Equity and Inclusion in the Field

Perhaps most significant in this shift is the need for the evaluation field to directly address issues related to diversity, equity, and inclusion in the field. Participants named many different ways this must be done, including:

- Developing a pipeline of people of color into the philanthropic evaluation field;
- Supporting people of color within the field;
- Developing evaluation practices that are more equitable in their design, implementation, and dissemination;
- Building the skills to understand and explore structural racism as a driver of social problems; and
- Building skills to understand and explore opportunities for evaluation to support systemic transformation.

The participants who raised the concept of systemic transformation as part of equity work are well aligned with other discussions occurring around the need for "deep equity" that seeks to change how our social systems are constructed at their core, addressing the inequities built into the systems' purposes and designs.[iii]

Existential Crises

Many participants described, in one way or another, two overarching challenges facing the philanthropic and evaluation fields related to perceived legitimacy:

- **Philanthropic impact:** Philanthropy is grappling with whether or not the philanthropic system, as currently designed, can achieve larger systemic change goals. Can philanthropic institutions, at times based outside the places they are seeking to change, support meaningful change? What is the value they are bringing to the issues they seek to address? These questions have direct impact on the role of evaluators, as the operating assumption of conducting evaluation is that impact is possible and can be made visible through the collection of evidence.
- **Evaluation value add:** The role of the evaluator is less clear now than ever before, due to the increasingly complex, systemic work that philanthropy seeks to undertake. Evaluators are often unable to offer compelling (or comprehensive) evidence or clear-cut descriptions of attribution or even contribution. At the same time (or perhaps in response), evaluation's "lane" has expanded to include many other skillsets and roles (e.g., coach, facilitator, technical assistant, learning partner, strategist) that it has become less clear to others what evaluation is meant to bring to the table.

[iii] While there are many great resources related to systems change and equity, one of the more recent publications is by Sheryl Petty and Mark Leach has a compelling exploration of deep equity through the lens of how equity work lives across individual, interpersonal, institutional, and systemic levels, with distinct opportunities (and impediments) to change at each level (see: Systems Change & Deep Equity: Pathways Toward Sustainable Impact, Beyond "Eureka!," Unawareness & Unwitting Harm, 2021).

Perceived Decline in the Influence of Evaluators

Some participants described the field of evaluation as having lost much of its historical influence with the "c-suite" and the board of philanthropic organizations. This is thought to come from a variety of factors, but for these participants, they saw this dynamic as increasing over time as evaluation has transitioned from a more objective, accountability-focused role to being in-service to programs; as the field has shifted from a composition dominated by white men to a more diverse field; and as designs have transitioned to prioritize rich descriptions, mixed methods, and learning approaches instead of experimental and quasi-experimental design. Yet, if evaluation is to have an impact at the strategy level – to actively influence decision-making – it needs to be seen as credible and useful. It is worth noting that not everyone was comfortable with the descriptions that others were making about the decreasing influence of evaluation and the assumptions they held about how the composition and role of the field was driving the decline.

Siloing of the fields

Many participants described the problematic siloing of information sharing and knowledge development between and within philanthropy and evaluation fields, including:

- Philanthropy from other institutions that seek to drive change;
- Philanthropic evaluators from the larger evaluation field;
- The evaluation field in general, with many different silos;
- Philanthropy and evaluation from the communities they serve; and
- Philanthropy and evaluation from academics whose work could help inform theirs.

These silos limit the progress of knowledge development and dissemination between fields, create barriers to solving problems that exist within one part of the field and have been solved for in another, and make it difficult to transition into the field of philanthropic evaluation due the specialization of the evaluation practice.

Evaluators may have skill gaps

Participants indicated that the field includes individuals who lack critical knowledge and skills, limiting their ability to provide effective, timely, and useful information in the philanthropic context. These gaps include:

- Knowledge of how philanthropy operates;
- Understanding of strategy – design and implementation;
- Understanding of systems;
- Skills to lead a learning session and facilitation skills more broadly; and
- Soft skills more generally.

Some of these skill deficits were identified as resulting from the emphasis on methods over softer skills in evaluation training programs. Some were identified as a result of the changing roles of evaluators, including the many "hats" evaluators now wear (an issue that has been brought up before[xviii]). Participants also expressed concern with the "everyone is an evaluator" moment we are in, which may lead to inconsistency in the skills that evaluators bring to their work.

Other field building needs

While each of these context topics could be an area for field building on their own, they are also important context for exploring how to address the two priority topics (how evidence is used in decision-making and casual evidence specifically). In addition to these context challenges, three specific additional field building needs were identified, but not discussed in any depth:

- Building and strengthening the relationship between foresight work, evaluations, and strategies;[iv]
- Strengthening participatory evaluation practices and processes, seen as necessary for meeting this current moment; and
- Expanding access to a variety of types of onboarding/training for evaluations, from systems and philanthropic knowledge to influence skills and understanding of strategy design and implementation.

Potential Actions & Opportunities

Participants generated a set of ideas about how a philanthropic institution could directly take action or support a leader in the field to take action in order to improve the use of evidence in the field and/or advance the use of causal analysis in philanthropic evaluations. The brainstormed actions included:

- Building a shared understanding of the field, including mapping the field or convening the major funders, champions, evaluators, etc. to explore and describe what a healthy field needs to include;
- Funding relevant research, product development, and dissemination, including:
  - A guide to methods related to causality (or helping disseminate existing guides); and/or
  - Illustrative case studies on the use of evidence in decision making (either funding the work itself or the documentation of existing case studies to share more broadly);
- Providing training for evaluators to fill in skill gaps;
- Creating new or resourcing existing spaces to have dialogues that bridge silos, including focusing on topics like systems thinking, equity within the context of systems change, defining evidence, etc. Structures could include the existing Topical Interest Groups of the American Evaluation Association, the Evaluation Roundtable, or other places where philanthropic partners, evaluators, and others could come together;
- Documenting and making more accessible the existing lessons learned across the field (and from related fields) by bringing together the breadth of relevant knowledge in one place; and
- Learning from fields outside philanthropy, including the international development space; academics who study philanthropy; academics who look at measurement issues; and indigenous evaluation.

Potential Partners or Models for Action

Participants also identified a set of organizations currently doing work on these topics. Many of these are organizations Walton has already been working closely with and/or funding, and many participants in the dialogues were also closely connected to these organizations.

[iv] For those less familiar with foresight work and its relationship to evaluation, this is an area the field is just beginning to explore, though some individual evaluators have used foresight methods for many years. Foresight is the act of looking to and thinking about the future. The tools of foresight can help to articulate multiple possible futures and understand what is most relevant across and within them. For a quick introduction to the relationship between foresight and evaluation and additional resources, visit this AEA365 blog on from March 2021.

Table 1. Organizations/initiatives directly related to the prioritized topics, with work that spans multiple issue areas

Org/Initiative Name	Brief Description of Related Work
Hewlett Foundation's Knowledge for Better Philanthropy Initiative	The goal of this work is to "Inform and improve funders' thinking and decision-making through the creation and dissemination of independent, high-quality research about philanthropic practice."
Funder-Evaluator Affinity Network (FEAN)	FEAN published a relevant call to action brief in 2020: "Good Intentions Are Not Enough: Making evaluations more useful for foundation strategy and practice." The staffing for FEAN is sunsetting in 2021, but some of the work may continue in other venues.
Center for Evaluation Innovation (and the Evaluation Roundtable, specifically)	The Center itself is focused on field building, with particular interest in evaluation in the context of complex social change and in philanthropic evaluation and learning. The Evaluation Roundtable, which the Center supports, is a network of evaluation and learning leaders from over 130 foundations in the U.S. and Canada. In 2020, it launched a new approach that, among other priorities, seeks to "increase the ability of foundations, nonprofits, and other change agents to navigate and transform the complex dynamics that shape our world."
Center for the Study of Social Policy	The Center's work on Learning & Evidence seeks to change the ways that researchers and policymakers generate and apply knowledge and evidence. They have recent publications on how to make good use of evidence in decision-making, a review of what evidence policymakers need, and case studies.[xix]
Project Evident	This organization, recently launched by the Edna McConnell Clark Foundation in partnership with five other funders, is particularly interested in testing alternative solutions to increase the supply of evidence-based approaches in the social sector and scale them faster. The evidence focus is programmatic, with a goal of working with practitioners and funders.
Tamarack Institute	Tamarack's focus on evaluating impact, particularly in the context of complexity, includes practices and publications focused on alternative approaches for getting change makers involved in generating and using evidence.

Additionally, participants also identified organizations whose past work or current work in related fields and topics might be important to learn from and establish an ongoing connection to, including:

- Equitable Evaluation Initiative (particularly the Making the Case Collaboratories);
- Expanding the Bench and the Advancing Culturally-responsive and Equitable (ACE) Evaluation Network; and
- Democratizing Evidence in Education, whose website includes advice specifically for philanthropy on how to foster equitable, meaningful engagement of stakeholders in the research process.

Conclusion

In general, the biggest theme across both of these potential priority areas for field building was that the barriers are less about the evaluators' methods, tools, and processes. Rather, there are norms, decision-making processes, expectations, assumptions, credibility of evidence issues, visibility and understanding, and gaps in expertise that inhibit evidence use in decision-making (including causal evidence). These are not insurmountable problems, but must be tackled in a way that is congruent with the larger issues facing the field, including an increasing interest in and transition to trust-based philanthropy models, commitment to equity and culturally responsive approaches, and shifting norms around how evaluation influences decision-making in many philanthropic settings. They are also not new problems, which means that the work to advance the field on both priority areas can be grounded in efforts, organizations, and leading individuals already seeking to advance the field on these topics and in related areas.

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