

FEAN Call to Action Series:
Collaboration & Partnership

Better Together:

How Evaluator Collaborations Can Strengthen Philanthropy
and Increase Collective Knowledge

Collaboration & Partnership Action Team

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About FEAN

The Funder & Evaluator Affinity Network (FEAN) is a collective effort to transform how funders and evaluators collaborate, with the goal of deepening the impact of evaluation and learning on philanthropic practice to advance more equitable and sustainable outcomes. FEAN brings together funders and evaluators to review the current state of evaluation in philanthropy, identify key opportunities and challenges facing the field, and work toward solutions that advance shared capacity both individually and collectively. FEAN's field-shifting strategy is [grounded in a set of shared values](#) among funders and evaluators: inclusion, the need to create space for new and different influencers, collaboration over competition, and optimism. Founded in June 2017, FEAN now has more than 330 members.

Our Funders

Gordon and Betty Moore Foundation
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About FEAN's Call to Action Series

In the fall of 2019, five Action Teams made up of volunteers from FEAN's membership, assembled to develop actionable recommendations or tools in five practice areas: **Strategy & Practice, Evaluators of Color, Knowledge Sharing, Global Transformation, 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

Partnerships between evaluation firms have many benefits for funders and evaluators. The benefits can include increased quality of evaluation and collaboration, greater equity for all stakeholders, and stronger field capacity for learning at scale.

In late 2019 and early 2020, we assembled a work team of seven funders and 11 evaluators to explore how more formal partnerships between evaluation firms can increase collective knowledge within the field and ultimately strengthen philanthropy.

Our group identified key rationales for establishing such partnerships, as well as emergent best practices in creating and maintaining successful partnerships; analyzed barriers that impede funders and evaluators from pursuing partnerships more frequently; and articulated some field-level strategies to counteract those barriers. In this brief, we share some of our most valuable insights.

The Rationale for Partnerships: Making the Case

In Summary: Why Establish Partnerships?



Funders

- Better access to a broad range of technical skills or subject expertise
- Diversify team perspectives and elevate diverse evaluators
- More collective knowledge for field building



Evaluators

- Opportunity to work within more diverse teams
- Competitive positioning
- Efficiency of human capital
- Professional development for teams
- Better/local coverage of specific communities

Partnerships between evaluation firms have many benefits for funders and evaluators. These benefits can include increased quality of evaluation and collaboration work products, greater equity for evaluation teams and informants, and stronger field capacity for learning at scale.

For funders adopting complex systems-change approaches, effective evaluation of these efforts requires lenses from many disciplines. The demand for diverse expertise reduces the likelihood that any single firm can meet all needs. When structured with care, partnerships can provide a more optimal mix of skills and knowledge than any single firm can offer. Multi-site projects also often benefit from partnerships where there is a need for some firms that deeply understand a specific community and others skilled at looking for themes across communities.

Partnerships can build capacity in the field and advance diversity, equity, and inclusion values. Evaluator partnerships can create opportunities for evaluators of color in smaller firms or who are sole practitioners to form new relationships with funders. Finally, partnerships among evaluators are critical to building collective knowledge about issue areas by encouraging evaluators to pool knowledge from individual studies to understand larger patterns and create more public knowledge.

Evaluators benefit from more formal partnerships between firms. Partnerships can allow small to mid-sized firms to bid on larger projects and might reduce the need to keep a large staff on retainer, instead assembling “built for purpose” teams to match the needs of specific projects, mirroring the networked approach to teams that has been growing in the business world for some time. Partnerships between firms can provide professional development for staff, something that is often a challenge for mid-size firms.

Barriers: Why Don't Firms Already Partner More Frequently?

In Summary: Partnership Barriers



Funders

- Tight time frames for identifying evaluation partners
- Complexity
- Increased responsibility for managing evaluation
- Limited knowledge on how to create and manage partnerships



Evaluators

- Limited time to respond to RFPs
- Unbillable time
- Difficulty finding partners
- Funder reluctance
- Managing funder-evaluator power dynamics

The barriers we identified fell into two categories—logistical and relational. Funders and evaluators experienced similar barriers in different ways. The funders in our group tended to feel more concerned about logistical barriers. Evaluators tended to express more concern around relational barriers.



Funder concerns

- **Tight time frames for identifying evaluation partners:** Many foundation staff underscored that they often find themselves asked to secure evaluators under tight time frames. This increases the pressure to go with people they know and makes choosing a single “full service” firm an attractive option. It’s always easier to “go with who you know” than reach out to new partners. Building new relationships takes time and selecting an untested partner can feel risky, especially since “name brand” firms confer instant credibility to an evaluation.
- **Complexity.** Hiring just one firm requires less work for the funder. Contracting with multiple firms is more complex, especially if data-sharing agreements are involved.
- **Increased responsibility for managing evaluation.** Partnerships require more time and responsibility for the funder, especially if they are brokering partnerships.
- **Limited knowledge on how to create and manage partnerships.** Funders felt they had little experience in creating and sustaining effective partnerships and didn’t know where to find good guidance.



Evaluator concerns

- **Limited time to respond to RFPs.** Evaluators stressed that it is better to build relationships between evaluators BEFORE an RFP is issued, as RFP response time rarely provides enough time to find partners and build new relationships.
- **Unbillable time.** Building partnerships takes time that is often not billable, with tasks like defining roles and building trust.
- **Difficulty finding partners.** Like funders, evaluation firms also tend to “go with who they know.” Smaller firms and those run by people of color are often outside these existing networks.
- **Funder reluctance.** Funders are reluctant to hire an untested partnership, which makes firms more likely to reach out to past partners.
- **Managing funder-evaluator power dynamics.** These typical challenges are compounded when adding multiple evaluation partners.

Strategies and Practices: Creating a Warming Climate for Evaluator Partnerships

In Summary: Funder and Evaluator Practices



Funders

- Invite prospective evaluators to an RFP design process meeting
- Rethink the economics of partnerships
- Unbundle RFPs for complex evaluations
- Provide vetted list of potential partners
- Make getting-to-know-evaluators a regular part of your job, not just part of the RFP process
- Underwrite the time for partnerships to develop a joint proposal
- Update your formal evaluation guidelines and policies to provide guidance on partnerships



Evaluators

- Ask your funders to convene their evaluators working on common issues or in the same region
- Build your database of potential partners outside an RFP process
- Meet informally with funders in your issue area before RFPs are issued
- Send this brief to your funders and set up a time to discuss it
- Update your operational procedures to provide guidance on partnerships

Our group identified some specific practices that funders and evaluators can incorporate to create a warmer climate for partnerships. The group also noted two field-wide conditions that can add tailwinds to more partnering among firms.



Practices for Funders

Invite prospective evaluators to an RFP design process meeting. Before issuing an RFP, host prospective evaluators for a conversation about your goals and their ideas for addressing them. Invite a wide range of evaluators—some that could do it all and some who may be specialists in a niche area. Funders would gather more wisdom on how to structure an RFP. Funders can see who works well together and can meet others with whom they might partner.

Rethink the economics of partnerships. Pairing a smaller local firm that has community connections with a larger firm that has more specialized analytic skills can be less expensive. Consider letting a community-based firm with local expertise take the lead, in partnership with a “blue chip firm” for more specialized tasks or added capacity.

Unbundle RFPs for complex evaluations. If funders are seeking very diverse skills, consider encouraging firms to respond just to the parts where they are strong. This puts the responsibility on the funder to broker the mixing and matching. It would also expand the pool from which they could choose.

Provide vetted lists of potential partners. If an evaluation will require a greater mix of skills (such as general evaluation skills and content or community relationships) than a single evaluator might have, funders could provide a pre-vetted list of potential partners in the RFP. This resource would save firms significant time finding a partner and raise the visibility of smaller firms and a more diverse pool of evaluators.

Make getting-to-know-evaluators a regular part of your job, not just part of the RFP process. Make time to meet with evaluators in your region or issue area before you issue an RFP. Evaluators are often more candid in their advice when not pitching for a specific project. When the time comes to issue an RFP, you'll have ideas to reach out beyond typical candidates. Reach out to the [Expanding the Bench](#) project and Independent Consultants Topical Interest Group (TIG) at AEA to get recommendations on smaller firms in your issue area or region. Evaluators can also reach out to funders. Ask for a “get acquainted meeting” or offer a free brown bag talk for staff.

Underwrite the time for partnerships to develop a joint proposal. This would ensure a more realistic proposal, and give firms more time to work out their swim lanes. It would help funders feel more confident in going with a group that hasn't worked together before.

Update your formal evaluation guidelines and policies to provide guidance on partnerships. Many larger foundations have formal policy documents. Review them to include some information on the benefits of evaluator partnerships.



Practices for Evaluators

Ask funders to convene their evaluators working on common issues or in the same region. Most funders are very comfortable in their convening role—especially if partners ask them. This document provides language that can help evaluators explain the benefits to the funder, their grantees, and the evaluators.

Build your database of potential partners outside an RFP process. Reach out to the Expanding the Bench project and Independent Consultants TIG at AEA to get recommendations on smaller firms in your issue area or region.

Meet informally with funders in your issue area before RFPs are issued. Take advantage of opportunities where time pressure may not be a factor to increase funder awareness of your own strengths and interest in partnerships.

Send this paper to your funder partners and set up a time to discuss it. Sharing this brief with funders could raise their awareness of the potential equity and field learning benefits of partnership and open up new avenues of conversation.

Update your operational procedures to provide guidance on partnerships. Many larger firms have formal policy documents. Review them to include some information on the benefits of evaluator partnerships.

Field-Level Recommendations

Fund the development of a partnership decision tool and practices guide. Our Action Team has identified key issues, developed an outline of a tool, and identified examples of successful partnerships. Turning this collective knowledge into a practical and accessible tool is beyond the scope of our Action Team, but well within its combined skill set. Such a tool would give more funders the confidence to seek out partnerships, broker them, and support them. And the tool would provide evaluators material to share with funders when proposing partnerships and to more effectively broker among themselves.

Support evaluator meet ups in their region or issue area. Perhaps the biggest barrier to both funders and evaluators is limited relationships. Everyone agreed that relationships are best built outside the context of responding to a specific RFP. Building relationships through authentic working experiences is ideal. For example, the FEAN Action Teams are building significant relationship capital among funders and evaluators who don't always work together. But even a more traditional "meet and greet" or speed dating event could fertilize the field for more partnerships.

Regional or topical associations of grantmakers are a logical sponsor for such an event. For instance, the Left Coast Evaluators, an informal association of foundation evaluation staff on the west coast, could host this type of event in coordination with one of its regular meetings. Foundation staff can join a portion of the event as professional peers. A session might offer evaluators professional development on a topic the funders would like to see grow (such as equitable evaluation) along with some structured activities for people to get to know each other in authentic ways.

Next Steps: Developing a Best Practice Guide and Decision Tool

Both funders and evaluators desired a decision tool and best practices guide to reduce the unknown factor involved in partnerships. There is much knowledge in the field about effective practices, but no easy way to access it. Such a tool could support funders and evaluators who are open to the idea of partnerships, but hesitant to wade into the territory. It could provide planning phase support to assess when a partnership would be worth the effort, as well as practical tips for creating and sustaining them once a partnership approach is selected. A guide could include:

- The rationale for partnerships: making the case and risks and benefits
- Partnership types—with examples or brief case studies
- Questions to assess readiness to partner (for both the funder and evaluator)
- Wisdom for setting up and maintaining partnerships, including key decisions

Along with the challenges and opportunities of developing partnerships between evaluation firms, we have identified four major dimensions of these partnerships—**Principles, Structures, Governance, and Products/Outcomes**—that require attention and intention to ensure partnerships work well. An important next step is to build out the tools that would make key decisions along each of the four dimensions explicit, manageable, and equitable.

Figure 1: Evaluator Partnership Dimensions

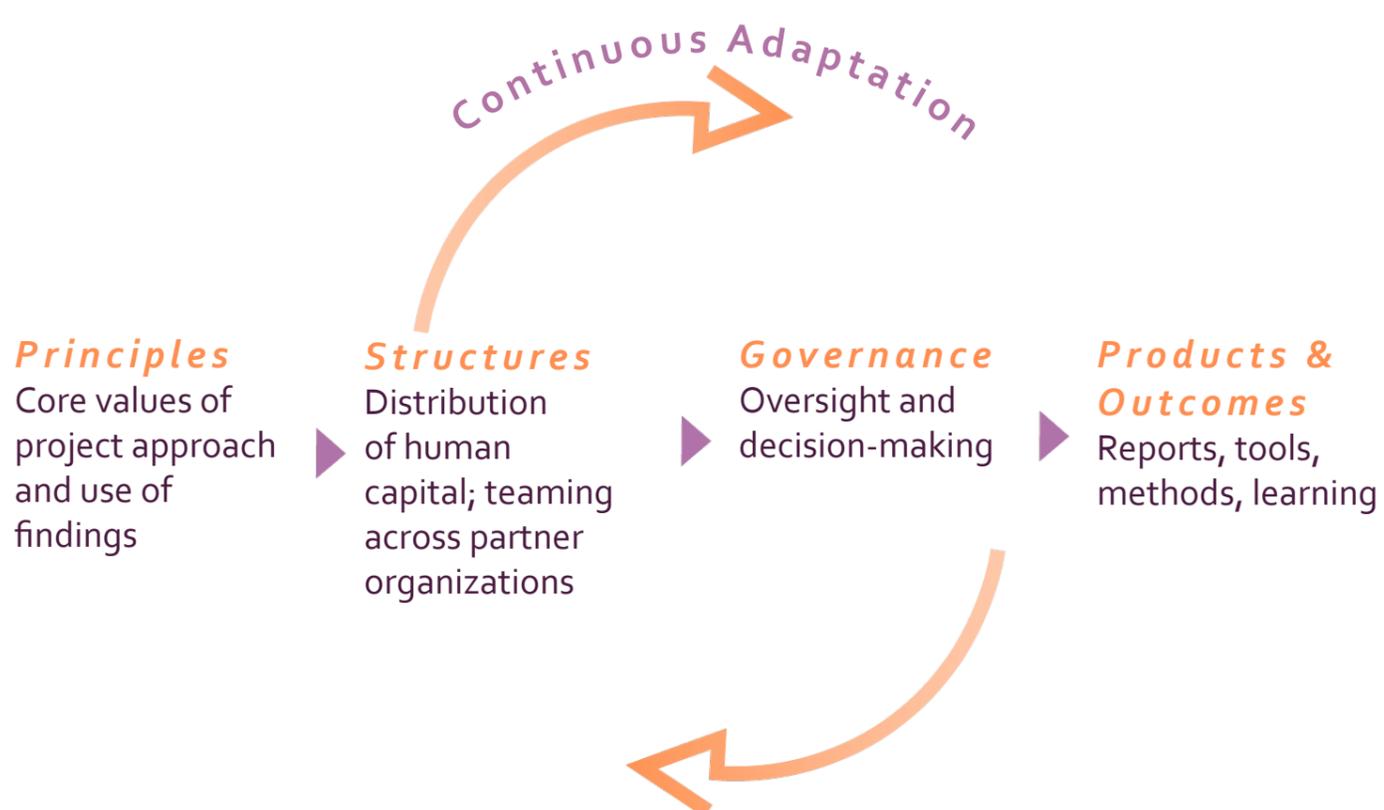
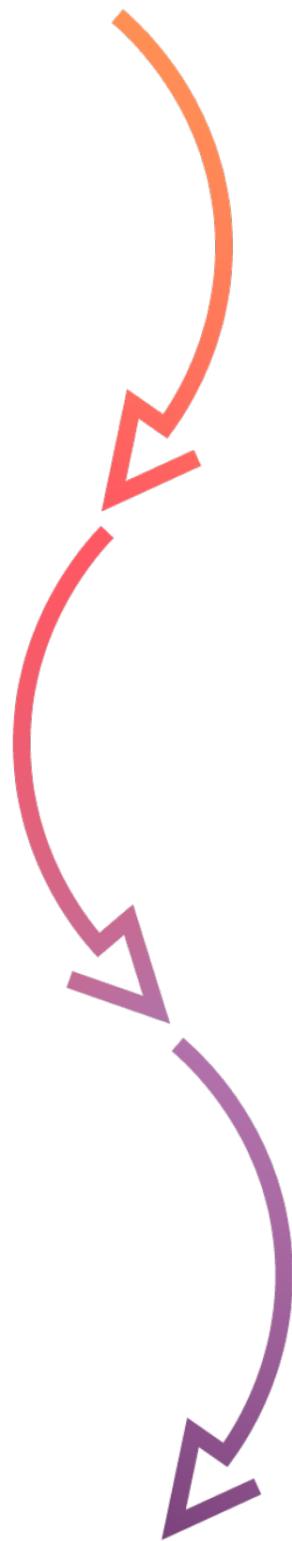


Figure 2: Key Decisions of Evaluator Partnerships



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?
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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?
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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?

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