Luminare
GROUP

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Moving From An Evaluator Pipeline To An Evaluation Ecosystem

Where We Are Now | What's Needed Next

A SUMMARY

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Note: Bolded text indicates ideas we believe are particularly important.

To the Point

There are close to 90,000 foundations in the United States and, because of limited regulation, these foundations have great latitude to determine what they focus on and how they do their work. **Evaluators can play an important role helping foundations understand the effects of their strategies and, in some cases, expand their thinking about what constitutes expertise, evidence, and impact**. Understanding the roles, responsibilities, interests, and pressures on foundation staff and other stakeholders—as well as how that influences evaluation needs—is essential for effective evaluation. It is increasingly important for evaluators to connect evaluation efforts to strategy and decision making; and to do that, evaluators need to understand relevant history and navigate an often shifting context. Evaluators need to strategically use data to inform stakeholders versus analyzing data without a nuanced understanding of context or intent. However, evaluators are often not prepared to take on that role within foundations, or in general.

The term "pipeline" is typically used to refer to the supply of people entering and ready to work in the field of philanthropic evaluation. In this report, we propose that the notion of a **"pipeline" needs to be reimagined and recalibrated**. "Pipeline" framing and language reinforces a notion that the challenge lies primarily with the supply of people entering the evaluation field—that the pool needs to be broadened, and movement into evaluation positions must be accelerated to meet the needs of foundations. Within this broader context, foundations and other stakeholders have recognized the need to **diversify the field of evaluation**. However, this orientation places the onus on so-called "pipeline programs" designed to support the professional advancement of individuals from a variety of backgrounds into evaluation roles, and little attention on what diverse individuals entering into evaluation roles need and value. It also fails to acknowledge that there are two points of entry into evaluation roles–accidental and academic. Many individuals end up in the field of evaluation accidentally, coming into evaluation with training in other disciplines and/or an understanding of philanthropy who learn evaluation while on the job. The other route are the academic evaluators—who come into roles with extensive formal training in evaluation, but who may lack an understanding of the philanthropic context and other relevant content areas.

We believe that rather than a pipeline, **we need an "evaluation ecosystem"** that looks beyond these programs and considers the roles multiple organizations in our field can play in supporting the entry and advancement of diverse individuals and perspectives within our field. For example, while many efforts are geared to build a more diverse pipeline in terms of individual demographics, which are needed and important, that is not the same as promoting practices and contexts that enhance and reinforce equity, focus on relevance and use, and continue to evolve our definitions of validity.

Recruiting diverse evaluators into contexts that have a strong white dominant culture[1] will do little to advance equity and can, in fact, undermine it.

Evaluation is both a practice and a role. Even organizations without a dedicated budget, can and should engage in evaluative thinking as part of their practice in order to understand the ways in which they are meeting the mission and progressing towards their vision. The difference between evaluation and evaluative thinking, is that evaluation focuses on the tasks of gathering information to make a judgment while evaluative thinking is being strategically curious and thinking critically in service of your stated aims and values within a specific context[2]. **Pipeline efforts will have limited success if corresponding efforts are not made within foundations and with other stakeholders.** There must be broader support for the role within the organization as well as greater diffusion of evaluative thinking throughout organizations.

Our scan of existing pipeline programs, often resourced by foundations, reveals **gaps in preparation for participants** to enter the field of philanthropy. Moreover, an emphasis on these programs does little to address the ways in which foundations, philanthropy serving organizations, and consulting firms can better support the entry and advancement of diverse individuals into evaluation roles. Information about the purposes and roles of evaluation within philanthropy, the different ways foundations invest in evaluation and how much is spent, and the job market for evaluation careers within philanthropy (and training implications) are areas where additional work is needed. In market terms, we cannot create an effective supply if we don't understand demand.

Evaluation firms, consultants, and institutes are other areas for further exploration and connection. While some firms host fellows or interns, pipeline programs typically don't focus on the needs of evaluation firms. For small to midsize firms, it often doesn't make sense from a business perspective to train, mentor, or pay fellows. **Better understanding how to involve and support small to midsize firms, particularly those with diverse staff, is important to developing a vibrant and effective ecosystem.**

Efforts are also needed to help evaluators grow as managers and as leaders be able to be clear about their ethical and professional limits and boundaries. This also means having opportunities

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[1] For more information see: https://www.showingupforracialjustice.org/white-supremacy-culture-characteristics.html
[2] For more information see: https://pj.news.chass.ncsu.edu/2017/04/24/the-importance-of-developing-an-evaluative-mindset-in-foundations-part-i/

and expectations for evaluators to name the values, assumptions, and experiences that inform their approach. Including **evaluative thinking content in leadership** programs for philanthropy is another approach for creating a vibrant evaluation ecosystem, and would likely yield benefits beyond just evaluation (for example, improvements to strategy development and implementation).

Shifting mindsets, skills, policies, and practices is a marathon. One study estimates that translating medical scientific discoveries into patient benefits took about 17 years (Morris, Wooding, & Grant, 2011). While a new scientific discovery is not the same as creating an effective evaluative ecosystem, the similarity is that there's a lag between "knowing" about a need or a new way of doing something and that something "showing up" in practice. It doesn't just happen, and it doesn't happen quickly. **More publicly available information on what works, why, for whom, and to what ends is needed, as well as spaces for those playing different roles in the ecosystem to connect and make sense of that information.**

Background

As the work of foundations has evolved, many have sought evaluation partners who can help them understand the effects of their strategies and in some cases expand their thinking about what constitutes expertise, evidence, and impact.

Figure 1 is a depiction of the philanthropic evaluation ecosystem. Included in the ecosystem are professional organizational networks (for example, American Evaluation Association, Grantmakers for Effective Organizations), academic and educational institutions (for example, University of Illinois Urbana-Champaign, Evaluation Institute), consultants and consulting firms (for example, Engage R+D, Equal Measure), foundations and nonprofits (for example, The California Endowment, community housing organizations), government agencies (for example, National Institutes of Health), and corporations/investment companies (for example, UBS). Surrounding the ecosystem, shown in orange, are contextual factors that influence philanthropic needs and opportunities.

Figure 1. Philanthropic Evaluation Ecosystem
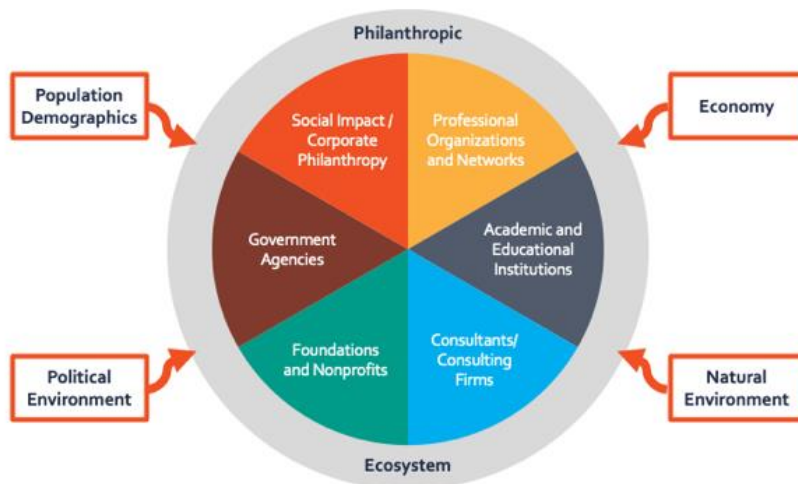
In order to strengthen the field of philanthropic evaluation, Engage R+D partnered with Equal Measure, the Center for Evaluation Innovation, and the Luminare Group on a collective effort including three projects. In this report, which is part of the larger effort, we summarize information about recent evaluation pipeline initiatives. There is a market supply and demand framing to this research. This market framing reflects the current paradigm which, although shifting (towards partnership and/or ecosystem), has not done so fully, nor is it clear that it will. We focus on the supply (evaluators) with some attention to the demand (foundations), as well as other perspectives.

Purpose and Focus

Luminare Group conducted research to:

- Better understand the extent to which current and recent pipeline efforts align with foundation needs and contexts, and thus are working well;
- Share considerations and recommendations to strengthen or support alignment; and
- Recommend additional lines of inquiry to support and enhance foundation evaluation practice through pipeline and potentially other efforts.

On What Kind of Efforts Did We Focus?

Broadly speaking, there are two pipelines for evaluators. First, there are accidental evaluators—who come into evaluation with training in other disciplines and/or an understanding of philanthropy and learn evaluation while on the job. The other route are the academic evaluators—who come into roles with extensive formal training in evaluation, but who may lack an understanding of the philanthropic context and other relevant content areas.

Figure 2. **Paths to Becoming an Evaluator**
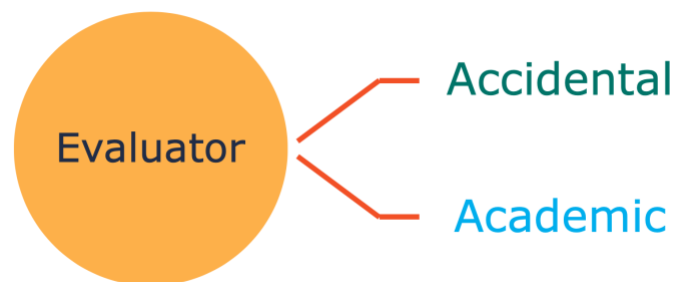
What Were Our Research Questions?

Three questions framed our inquiry:

1. What are the needs and the contexts (current and emerging) for evaluation in foundations?
2. On what are recent evaluation pipeline efforts focused and what are they achieving?
3. How aligned are pipeline efforts with the current (and evolving) evaluation needs and functions within foundations?

[1]

What Do We Know about the Needs and Context for Evaluation in Foundations?

There are close to 90,000 foundations in the United States (Foundation Center, 2014). Because of limited regulation, foundations have great latitude to determine what they focus on and how they do their work (Hall, 2004). There are different sizes and types of foundations, different core values, different approaches, and different needs for and uses of evaluation. In this section, we provide an overview of needs and contexts.

EVALUATION FUNDING

There is currently no good source of information about evaluation spending by foundations. This is in part because evaluation spending can be bundled with other grant activities (and thus there is not always a single line item to track), and because those fulfilling evaluation roles within organizations may not be considered evaluation staff and, in some cases, those in evaluation roles have responsibilities not considered evaluation.

Kinarsky (2018, pg. 91) noted that "little is known about the evaluation procurement and contracting practices of foundations and nonprofits." Based on available data "3% or less of the evaluation giving documented in Foundation Center data went directly to a company that specializes in evaluation. Most of the funds were first awarded to a local non-governmental organization (NGO) or school, which in turn solicited and procured evaluation services." Based on the review of Foundation Center data Kinarsky (2018, pg. 94) concluded that "while foundations are the ultimate source of revenue, they are less often the direct buyers of evaluation services." The role of foundations in helping grantees secure evaluation services varies, as depicted in Figure 3.

Figure 3. Foundation Roles in Securing Evaluation Services

FOUNDATION INTERNAL CONTEXT

Philanthropy can be a challenging context for evaluators, because while most foundations believe it is important to have an explicit strategy to manage and inform their grant-making decisions, few foundations have actually developed one (*Essentials of Foundation Strategy*, 2009). That makes it extremely difficult to effectively evaluate anything. Evaluation can (and should) inform strategy, but it cannot make up for the lack of it.

Furthermore, *Benchmarking Foundation Evaluation Practice* (2016) notes that foundations are constantly changing and in transition. When recently asked if they had gone through transitions, 60% (of 150 foundations) had gone through restructuring. In preparation for the 2019 Evaluation Roundtable, 140 foundation staff were interviewed during the months prior, and well over half shared that they were engaged in some sort of strategy refresh. This turbulent context requires an evaluator to have the ability to identify the shifts taking place and navigate the changes that means for evaluation. These changes can be significant, because evaluation can serve different purposes in foundations such as making better investment and funding decisions, identifying and maximizing impact, creating transparency and accountability, and identifying and reducing risks and negative consequences. Understanding the role evaluation plays in the work of the foundation is critical.

FOUNDATION BOARDS

Boards play an important role within foundations, and their information needs often dictate expectations for program and evaluation staff as well as the consultants with whom they work. The primary tasks of boards can be informed by evaluative efforts. While connecting evaluative functions with board needs is important, developing an evaluation strategy focused on the needs of the board is unlikely to provide sustainable value. However, working with the board to understand, support, and make better use of evaluation as an expression of their leadership is essential.

METHODS AND OBJECTIVITY

Internal and external evaluators need to understand foundations, their dynamics, and their stakeholders for any methodological or theoretical training to be usefully and ethically applied. Understanding the roles, responsibilities, interests, and pressures on foundation staff and other stakeholders, as well as how those influence evaluation needs, is essential. That understanding guides the methodological and logistical decisions needed to provide accurate, meaningful, and useful information.

Recent critiques of philanthropy, such as those from Villanueva (2018) and Giridharadas (2018) highlight that philanthropy has grown from and was founded on the very systems it often seeks to

change. Ironically, there are also calls for more impact-related data and simplified presentations of information (for example, data dashboards). The desire for more data, combined with the growth of impact investing, has driven foundations to hire data scientists to do descriptive and predictive work separate from the evaluation function. These emerging practices raise concerns that the data gathered, the analysis, and interpretation conducted by data scientists may reflect the entrenched biases at the heart of many recent critiques of philanthropy.

THE INTERNAL EVALUATION FUNCTION

The roles of the internal evaluation function continue to diversify. As noted by Owen (2006) evaluators' roles are complex and may include responsibilities not directly related to evaluation. It is increasingly important to know how to connect data to decision making; and to do that, one must understand the decision landscape and strategically use data to inform those decisions versus analyzing data without a nuanced understanding of context or intended use.

External evaluators are also increasingly expected to become partners in the work and engage in new ways. This includes paying attention to effectiveness and impact at the portfolio and organizational level both for grantees and the foundation. There is also increasing interest in looking at values alignment—examining how the work is done, how decisions are made, and who is involved. For example, when it comes to equity, there is a deeper recognition that diversifying the demographics of evaluators in the pipeline is not enough. Diversity, equity, and inclusion (DEI) work requires a specific set of skills. It is not simply a matter of changing who is involved in the work, but changing the work itself.

[2]

What are Evaluation Pipeline Efforts Focused on and Achieving?

Efforts to support evaluation in philanthropy have included approaches such as directories of evaluators (for example, Expanding the Bench's Advancing Culturally-responsive and Equitable Evaluation (ACE), formerly known as Annie E. Casey Foundation's Advancing Collaborative Evaluation Network), handbooks and guidebooks providing "how to" information (for example, Inouye, et al, 2005; Lee, K. 2007), and internships and fellowships (for example, Graduate Education Diversity Internship (GEDI)). Nolan, Long, and Perez (2019) also note efforts to support professional networks of evaluators working in philanthropy such as The David and Lucile Packard Foundation's practice of bringing together its monitoring, evaluation, and learning partners; as well as foundations such as The Colorado Trust contracting to provide evaluation training to foundation staff and partners. These are promising practices, but are not yet the norm.

SUMMARY OF PROGRAMS

Our focus is on professional development programs for evaluators, specifically internship and fellowship programs (summarized in Table 1), because those programs are focused on the evaluation pipeline, versus general capacity building. **We found that diversifying the pipeline is the primary purpose for many of the internships and fellowships.** Though not focused on philanthropy, we included the GEDI program, which was initially funded by the W.K. Kellogg Foundation, as well as Leaders in Equitable Evaluation and Diversity (LEEAD), funded by Annie E. Casey, because both are examples of the type of program we were interested in and they had ample documentation. We did not include internships and fellowship programs with only a single intern or fellow, or those not focused on building a pipeline. **Most programs are supply side driven, paying little attention to the demand side. In other words, the needs and expectations within philanthropy, philanthropy serving organizations, or consulting firms are often sidelined or ignored.**

Table 1. Overview of Evaluation Pipeline Programs

Leaders in Equitable Evaluation and Diversity (LEEAD)[3]	
Dates	2014-present
Audience & Cohort Size	Early-career scholars (3 – 5 years of post-doctoral experience in research and/or evaluation) from diverse backgrounds who aspire to become leaders in the field of evaluation.
Goals	Develop a pipeline of diverse leaders in culturally responsive and equitable evaluation who will advance the field of evaluation and improve community outcomes.

The Robert Wood Johnson Foundation (RWJF) New Connections Program[4]	
Dates	2006-2019
Audience & Cohort Size	Researchers of diverse backgrounds, including junior investigators and mid-career professionals from low-income communities, groups that have been historically underrepresented in research disciplines, and those who are the first in their families to graduate college.
Goals	To expand the diversity of perspectives that inform RWJF program strategy by introducing new researchers and evaluators to the Foundation.

The Robert Wood Johnson Foundation (RWJF) Evaluation Fellowship Program[5]	
Dates	2008- 2013
Audience & Cohort Size	African American, Latino, and certain Asian populations with an interest in and understanding of evaluation, who envision evaluation as a career option. Fellows apply to become "Emerging" or "Retooling Professionals".
Goals	Increase the presence and influence of underrepresented groups in the evaluation field, including minorities, first-generation college graduates, people from low-income communities, and others. Develop a cadre of diverse evaluation professionals, specifically those from traditionally underrepresented or underserved communities, who have come to the field with little formal academic training in evaluation.

Graduate Education Diversity Internship Program (GEDI)[6]	
Dates	2004-present
Audience & Cohort Size	Graduate students of color whose academic focus is not evaluation. Cohorts have ranged from four to 10 students.
Goals	Expand the pool of graduate students of color and from other underrepresented groups who have extended their research capacities to evaluation. Stimulate evaluation thinking concerning underrepresented communities and culturally responsive evaluation. Deepen the evaluation profession's capacity to work in racially, ethnically and culturally diverse settings.

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3 Program information primarily drawn from: *https://www.aecf.org/work/research-and-policy/research-and-evaluation/leaders-in-equitable-evaluation-and-diversity-leead/* and from the 2019 evaluation report: *https://expandingthebench.org/leead-final-2019-report/* as well personal communication with Rachele Espiritu

4 Program information primarily drawn from: The 2017 Call for Proposals (*https://anr.rwjf.org/viewCfp.do?cfpId=1368&cfpOverviewId*) and program documents including *http://rwjf-newconnections.org/* and *https://www.rwjf.org/en/blog/2014/06/new_connections_off.html*

5 Program information primarily drawn from: Christie, C.A. & Vo, A.T. (2011). Promoting Diversity in the Field of Evaluation: Reflections on the First Year of the Robert Wood Johnson Foundation Evaluation Fellowship Program. American Journal of Evaluation. 32(4) 547-564. Program FAQs: *http://www.rwjf-evaluationfellows.org/emerging-frequently-asked-questions-faq* And Program Evaluation Findings available at: *https://www.rwjf.org/en/library/research/2011/05/evaluation-fellowship-program.html*

Practice Recommendations

PRACTICES THAT SEEM TO WORK WELL

Our review of program documentation, as well as conversations with advisors, revealed themes about practices that seem to work well:

- Providing the following:
    - Opportunities for participants to meet and get to know each other as people,
    - Scholarships or financial support for professional development as well as time to participate in the initiative,
    - Opportunities to communicate and receive feedback on their communication of evaluation-related information (especially important for early career professionals), and
    - An inside look at philanthropy, through practices such as participants attending leadership meetings (in order to understand how things were funded, critical challenges), etc.
- Including a practicum (in a context or content area of interest) with opportunities for feedback (in both directions);
- Providing access to a mentor in a context and/or content area of interest; providing both the mentor and mentee choice in the mentoring relationship;
- Efforts funded by well-known and respected organizations that provide gravitas and access to further opportunities; and
- Identifying values, needs, and assumptions for all parties early to ensure or negotiate fit.

PRACTICES THAT DO NOT SEEM TO WORK WELL

Our review also revealed practices that did not seem to work well and include:

- Fostering a competitive environment among participants;
- Offering practicum projects that are controversial and/or politically charged without support; and
- Creating a mismatch between the content provided and the practicum needs; and providing content experts or materials that do not reflect/address the needs, perspectives, and experiences of participants.

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6 Program information primarily drawn from the 2019 Call for Applications on the AEA website: *https://www.eval.org/p/cm/ld/fid=183*) and Collins & Hopson. Eds.(2014) Building a new generation of culturally responsive evaluators through AEA's Graduate Education Diversity Internship program. New Directions for Evaluation, 143.

[3]

How Aligned are Pipeline Efforts with Evaluation Needs and Functions within Foundations?

At a high level, there seems to be a lack of alignment between what foundations want or think they need, and the ways in which evaluators are being prepared for employment or contracting. There is a growing sense that the pipeline needs to be reimagined and recalibrated, as well as burgeoning efforts to address that need. As evaluation functions expand to include learning and strategy, and impact investing becomes a larger part of foundations' portfolios, pipeline programs conceptually and as delivered may not be designed to meet this need. Efforts such as Expanding the Bench seek to reframe and better contextualize pipeline efforts. Shifting from "evaluator pipeline'" framing and language towards thinking about and moving towards an "evaluation ecosystem" may better reveal intentions and pathways.

In general, there is also limited information about the results of pipeline efforts. More publicly available information on what works, why, for whom, and to what ends is needed. **While many efforts are geared to building a more diverse pipeline, in terms of individual demographics, which are needed and important, that is not the same as promoting practices that enhance, reinforce, and embrace equity, as part of a focus on relevance and use.** Recruiting diverse evaluators into contexts that remain white dominant[7] will do little to advance equity and can, in fact, undermine it.

AWARENESS OF AND ACCESS TO EVALUATION WORK IN PHILANTHROPIC CONTEXTS

As in many sectors, how things actually work is not always clear to those new to the sector. One of the individuals we interviewed offered the following example: "I didn't know that foundations did not necessarily have open calls, that there is a short list and getting on the list is important." Anecdotally, we also heard that foundations tend to hire from the same pool of evaluators, and while that helps in

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[7] For more information about white dominant or white supremacy culture, see: https://www.showingupforracialjustice.org/white-supremacy-culture-characteristics.html

terms of having evaluators who can be depended upon and who understand context, it does little to build a sustainable, or diverse, source of evaluators.

Because of the diverse needs and expectations related to evaluation, lateral entry from another sector (or a non-evaluation field) into philanthropy is an important pipeline; but there needs to be a way to help people connect what is needed in philanthropy with what they already know. As noted previously, none of the evaluation degree programs focus on philanthropy and thus, there is not a specific program from which to recruit.

ABILITY TO WORK IN PHILANTHROPIC CONTEXTS

Practicing evaluators not only apply their technical expertise, they lead and manage projects within the context of philanthropy; requiring skills often not taught in evaluation programs. Efforts are needed to help evaluators grow their management and leadership skills. Evaluators also need opportunities to name their values and what they bring as evaluators—as well as their professional and ethical limits and boundaries. This could include support for determining when a request for proposed evaluation is not advisable and how to communicate concerns and, where possible, viable alternatives that are more appropriate.

There is some concern that by focusing on traditional and technical aspects of evaluation, we may assimilate new evaluators into a system of evaluation that is not ideal for foundations (or for evaluators). Providing space to work on and express one's identity is one way to prepare evaluators to appropriately challenge practices and expectations. Programs that include strong leadership development and identity components can benefit by including additional training in navigating organizational systems and politics. Evaluators must be able to design and execute approaches and communicate in ways that are contextually appropriate, meaningful, and timely. While there is increasing focus on contextualizing practices in current pipeline efforts, more is required in order to meet the needs of the ecosystem.

While degree programs were not our focus, academic programs often focus on methods and overviews of theory or approaches in general—and not the application and blending of them. **To be useful in any context, let alone philanthropy, evaluators must link their approaches to the values and needs of that context, and do so in a timely and practical manner. Evaluators must also be adept at selecting and mixing approaches and methods for specific contexts, and understand the tradeoffs and consequences across options. They must be able to refine approaches and methods to achieve specific purposes within the given context and aligned with the values of that context.** The pipeline programs we reviewed tended to include elements to help evaluators better understand and reflect different contexts, though typically without content about the philanthropic context in general.

EVALUATION EXPECTATIONS IN PHILANTHROPIC CONTEXTS

Evaluation is both a practice and a role. In our opinion, even organizations without a dedicated budget can and should engage in evaluative thinking in order to understand the ways in which they meet mission and progress towards vision. **Pipeline efforts will have limited success if corresponding efforts are not made within foundations and with other stakeholders.** There must be broader support for the role within the organization if it is to be effective. There also must be more diffusion of evaluative thinking throughout organizations.

Future Directions

Shifting mindsets, skills, policies, and practices is a marathon journey. One study estimates that translating medical scientific discoveries into patient benefits took about 17 years (Morris, Wooding, & Grant, 2011). While a new scientific discovery is not the same as creating an effective evaluative ecosystem, the similarity is that there's a lag between "knowing" about a need or a new way of doing something and that something "showing up" in practice. It doesn't just happen, and it doesn't happen quickly.

Because evaluation and philanthropy are varied and evolving contexts, a lot of work is needed to keep pace with the changing needs and perspectives, and to make strategic connections and shifts in practice. While efforts such as those by Buteau et al. (2016) and Kinarsky (2018) are illuminating, more work is required to understand the current range of foundations' evaluation goals, contexts, and practices. **Information about the purposes and roles of evaluation within philanthropy, the different ways foundations invest in evaluation and how much is spent, and the job market for evaluation careers within philanthropy (and training implications) are some of the areas where additional work is needed. In market terms, we cannot create an effective supply if we don't understand demand.** We also know from Kinarsky (2018) that while foundations provide the funds, they are often not direct buyers of evaluation services. A grant requiring evaluation is often awarded to a grantee, and then that grantee retains evaluation services. A more nuanced understanding of the full suite of stakeholders, needs, and connections is necessary. **Mapping the ecosystem would be a useful start.**

Evaluation firms, consultants, and institutes are other areas for exploration and connection. While some firms host fellows or interns, pipeline programs typically don't focus on evaluation firm needs. For small to midsize firms, it often doesn't make sense from a business perspective to train, mentor, or pay fellows. **Better understanding about how to involve and support small to midsize firms, particularly those with diverse staff, is important to developing a vibrant and effective ecosystem.**

A clearinghouse for information about evaluation pipeline efforts would also be useful— combined with a process to reflect on what works and why in different contexts; as well as gauging progress made towards establishing an evaluation pipeline, or perhaps more importantly an effective evaluative ecosystem. Including evaluative thinking in leadership programs for philanthropy is another approach for creating a more effective evaluation ecosystem, and would likely yield benefits beyond just evaluation (e.g., better strategy development and implementation).

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