Yvonne Belanger is the director of learning & evaluation at the Barr Foundation and leads Barr’s efforts to gauge its impact and support ongoing learning among staff, grantees, and the fields in which they work.

Recently, Janet Camarena, director of transparency initiatives for Foundation Center, interviewed Belanger about how creating a culture of learning and openness can improve philanthropy. This post is part of the Glasspockets’ #OpenForGood series in partnership with the Fund for Shared Insight. The series explores new tools, promising practices, and inspiring examples showing how some foundations are opening up the knowledge that they are learning for the benefit of the larger philanthropic sector. Contribute your comments on each post and share the series using #OpenForGood.

GlassPockets: More and more foundations seem to be hiring staff with titles having to do with evaluation and learning. You’ve been in this role at the Barr Foundation for just about a year, having come over from a similar role at the Bill & Melinda Gates Foundation. Why do you think roles like this are on the rise in philanthropy, and what are your aspirations for how greater capacity for evaluation and learning can benefit the field?

Yvonne Belanger: I think the spread of these roles in strategic philanthropy comes from increasing recognition that building a stronger learning function is a strategic investment, and it requires dedicated expertise and leadership. My hope is that strong evaluation and learning capacity at Barr (and across the philanthropic sector generally) will enable better decisions and accelerate the pace of social change to make the world more equitable and just.

GP: What have been your priorities in this first year and what is your approach to learning? More specifically, what is Barr’s learning process like, what sources do you learn from, how do you use the learnings to inform your work?

YB: At Barr, we are committed to learning from our efforts and continuously improving. Our programmatic work benefits from many sources of knowledge to inform strategy including landscape scans, academic research, ongoing conversations with grantees and formal site visits, and program evaluations to name a few. During this first year, I have been working with Barr’s program teams to assess their needs, to sketch out a trajectory for the next few years, and to launch evaluation projects across our strategies to enhance our strategic learning. Learning is not limited to evaluating the work of our programs, but also includes getting feedback from our partners. Recently, we were fortunate to hear from grantees via our Grantee Perception Report survey, including specific feedback on our learning and evaluation practices. As we reflected on their responses in relation to Barr’s values and examples of strong practice among our peers, we saw several ways we could improve.

GP: What kinds of improvements are you making as a result of feedback you received?

YB: We identified three opportunities for improvement: to make evaluation more useful, to be clearer about how Barr defines success and measures progress, and to be more transparent with our learning.

- Make evaluations more collaborative and beneficial to our partners. We heard from our grantees that participating in evaluations funded by Barr hasn’t always felt useful or applicable to their work. We are adopting approaches to evaluation that prioritize grantee input and benefit. For example, in our Creative Commonwealth Initiative, a partnership with five community foundations to strengthen arts and creativity across Massachusetts, we included the grantees early in the evaluation design phase. With their input, we modified and prioritized
evaluation questions and incorporated flexible technical assistance to build their capacity for data and measurement. In our Education Program, the early phase of our Engage New England evaluation is focused on sharing learning with grantees and the partners supporting their work to make implementation of these new school models stronger.

- **Be clearer about how we measure outcomes.** Our grantees want to understand how Barr assesses progress. In September, we published a grantees guide to outputs and outcomes to clarify what we are looking for from grantees and to support them in developing a strong proposal. Currently, our program teams are clarifying progress measures for our strategies, and we plan to make that information more accessible to our grantees.

- **Share what we learn.** To quote your recent GrantCraft Open for Good report, “Knowledge has the power to spark change, but only if it is shared.” To maximize Barr’s impact, we aim to be #OpenForGood and produce and share insights that help our grantees, practitioners, policymakers, and others. To this end, we are proactively sharing information about evaluation work in progress, such as the evaluation questions we are exploring, and when the field can expect results. Our Barr Fellows program evaluation is one example of this practice. We are also building a new knowledge center for Barr to highlight and share research and reports from our partners, and make these reports easier for practitioners and policymakers to find and re-share.

GP: Clearly all of this takes time and resources to do well. What benefits can you point to of investing in learning and knowledge sharing?

YB: Our new Impact & Learning page reflects our aspiration that by sharing work in progress and lessons learned, we hope to influence nonprofits and other funders, advance field knowledge, inform policy, and elevate community expertise. When you are working on changing complex systems, there are almost never silver bullets. To make headway on difficult social problems we need to view them from multiple perspectives and build learning over time by analyzing the successes – and the failures - of many different efforts and approaches.

GP: Barr’s president, Jim Canales, is featured in a video clip on the Impact & Learning page talking about the important role philanthropy plays as a source of “risk capital” to test emerging and untested solutions, some of which may not work or fail, and that the field should see these as learning opportunities. And, of course, these struggles and failures could be great lessons for philanthropy as a whole. How do you balance this tension at Barr, between a desire to provide “risk capital,” the desire to open up what you are learning, and reputational concerns about sharing evaluations of initiatives that didn’t produce the desired results?

YB: It’s unusual for Foundations to be open about how they define success, and admissions of failure are notably rare. I think foundations are often just as concerned about their grantees’ reputation and credibility as their own. At Barr we do aspire to be more transparent, including when things that haven’t worked or our efforts have fallen short of our goals. To paraphrase Jim Canales, risk isn’t an end in itself, but a foundation should be willing to take risks in order to see impact. Factors that influence impact or the pace of change are often ones that funders often have control over, such as the amount of risk we were willing to take, or the conceptualization and design of an initiative. When a funder can reflect openly about these issues, these usually generate valuable lessons for philanthropy and reflect the kind of risks we should be able to take more often.

GP: Now that you are entering your second year in this role, where are the next directions you hope to take Barr’s evaluation and learning efforts?

YB: In addition to continuing and sustaining robust evaluation for major initiatives across our program areas, and sharing what we’re learning as we go, we have two new areas of focus in 2019 – people and practices. We will have an internal staff development series to cultivate mindsets, skills, and shared habits that support learning, and we will also be working to strengthen our practices around strategy measurement so that we can be clearer both internally and externally about how we measure progress and impact. Ultimately, we believe these efforts will make our strategies stronger, will improve our ability to learn with and from our grantees, and will lead to greater impact.