PFC Learning Series
tool 2 – detailed guide

Learning in a time of crisis:
7 tips to help foundations focus on learning and evaluation

In non-crisis times, foundations often use tools such as strategic plans and evaluations to guide and inform action. A key goal for many foundations is to be able to describe the impact of their investments to help inform where and to whom future funding should be allocated.

However, the COVID-19 crisis has affected how several foundations operate as well as how they deploy their resources to support their grantees and communities. The magnitude of the crisis has led many foundations to recognize the need to be more responsive and less restrictive in the support they provide.

At the same time, there is an opportunity to reflect and learn from this moment in time regarding how foundations can work differently and what it means for contributing to positive change going forward.

This short guide offers seven tips for foundation staff to understand, adopt, and make use of a learning mindset. Included are several links to relevant resources for those looking to learn more.

CONTENT

CONTEXT

To begin, it's worth noting the broader context in which foundations are currently operating. The COVID-19 crisis is profound and the effects are evident in all walks of life. Philanthropic networks have been quick to offer support to their members and the broader philanthropic community through various knowledge sharing activities as well as by pushing for some common approaches.

Philanthropic Foundations Canada (PFC), Community Foundations of Canada (CFC), The Circle on Philanthropy and Aboriginal Peoples in Canada, and Environment Funders Canada developed Five Guiding Principles for Supporting Grantees to guide foundations as they consider how to best respond to the current situation. These principles are:

1. Be flexible, pragmatic and proactive in grant-making.
2. Collaborate on or contribute to emergency funds at the community and national levels as they emerge.
3. Stretch and deploy expertise and funds to protect the capacity and resilience of nonprofit and charitable organizations.
4. Support Advocacy.
5. Take the long view and stay engaged.

These principles are also echoed in other countries as philanthropic networks recognize the uniqueness of this time and push foundations to think about how to operate differently. Besides demonstrating that foundations need to operate differently, the crisis is teaching us that foundations can operate differently.

In Canada, there is already evidence of this. Indeed, many foundations are:

- Changing and accelerating how often they communicate with their boards, partners, and grantees
- Increasing support to grantees such as:
  - Removing restrictions on the use of grant dollars
  - Postponing grant reporting requirements
  - Advancing grant payments
  - Quicker turnarounds
- Introducing new support to help the charitable sector and communities such as:
  - Launching emergency response granting programs
  - Contributing to pooled funds that are either sector or regionally focused
  - Contributing to or offering loan programs
  - Offering capacity support such as by allowing staff to volunteer/assist other organizations
- Having more conversations with their grantees and others in the philanthropic sector to stay connected to what is happening in their community and being responsive to emerging challenges

While these initiatives deserve credit, it should also be noted that there have been many who have called for these types of actions for many years[1]. While this is a unique time in human history that requires a unique response, it is nonetheless important to think about the learning opportunities that this crisis presents and to preserve the lessons to inform how foundations should operate in the future..

With that context of what many foundations are doing and what many philanthropic networks are calling on foundations to do or continue to do, let's look at how foundations can foreground learning into their work now and moving forward.

TIPS

1. Build your learning culture

To be good at strategy, foundations need to be good at learning.

Organizations with strong learning cultures are able to adapt, innovate, and iterate to make sense of new realities and adjust accordingly. This is particularly acute now given the challenges presented by COVID-19.

While the importance of a strong learning culture may sound obvious, it's not always so easy to operationalize. For example, a 2017 survey of U.S. grantmakers, found that only 52% of respondents believed their culture was maximizing effectiveness.[2]

There are several reasons why building a strong learning culture is so difficult. These include not creating time to prioritize learning, a perception that learning is a nice to have or extra activity rather than embedded into the work, and a lack of clarity around what organizational learning means and who it is for.

There is no one way to become a learning organization nor is there an end state. A healthy learning culture in one organization may look different in another. Learning by its nature is an ongoing process. However, there are practices and processes that can be put in place to enable learning to take place.

> **Reading: What Will it Take for Philanthropy to Learn?**
> 13 minutes
> By Reisman, Coffman, Beer, Rae, and Millett
> Excerpt: "The stakes are high to get learning right. Many helpful tools to facilitate learning have been developed, but so far we have lacked clarity on the changes we want learners individually, in teams, and in organizations to experience. The sector needs to think rigorously about what constitutes high-quality, actionable, and equitable learning, and what it really takes to make it happen."

Research suggests that the following elements exist in strong learning cultures:

- **Learning is a habit.** Organizations build a focus on learning into their routine practices. They consciously invite and reward learning.
- **Learning goals are clear.** Organizations know what they want to learn and why that is important.
- **Deep questions get asked.** Organizations ask questions about their values and assumptions, not just questions about program tactics.
- **The organization is ready to act on what it learns.** Organizations are prepared for the implications of what they learn. They are willing and able to alter their practices.
- **Learning is inclusive and engages partners.** Organizations engage their external partners in the learning process.
- **Leadership drives organizational learning.** Executive directors, CEOs, presidents, and senior managers play an important role in leading by example and in creating space and encouraging others to learn.[3]

Developing a learning culture in a time where staff and board have less ability to connect with one another in person is particularly important. More attention needs to be paid to how conversations are enabled, hosted, and facilitated. There is a balance to be struck between ensuring good lines of open communication and supporting staff with understanding different work-at-home environments, connectivity and technological issues, and overall work-life balance. Even seemingly minor things like the number of video calls or whether video is even required in meetings can influence how and how much staff share with one another.[4]

> **Organizational Learning Self-Assessment Tool**
> 10 minutes
> This Organizational Learning Self-Assessment Tool can help organizations identify and assess the state of learning in their organization. It can be a helpful starting point for discussion that can identify areas of strength as well as areas for improvement.

2. Ask new kinds of questions

Learning in times of crisis requires seizing opportunities for reflection that include creating spaces to think, slowing down, being mindful and paying attention, creating new patterns of thinking, surfacing alternative interpretations, and creating new theories of action.

In the fast-paced environments of foundations, finding time for reflection has always been difficult. Without taking time for reflection and learning though, we will never know what worked, for whom, how, and what we should do differently or the same in the future. Ensuring we learn from our current practices is should no longer be a "nice-to-have," it is should be a "must-have".[5]

Many of the principles that the PFC, CFC, The Circle, and EFC joint statement identified speak to important elements of learning: being flexible; encouraging collaboration; and making visible how you work.

As noted earlier, many foundations have already taken steps in this direction.

- Many foundations (such as the Lawson Foundation and the Lyle S. Hallman Foundation) have loosened granting and reporting requirements.
- Many foundations have collaborated with others to figure out how they can work together to provide emergency support.
- Several community foundations were quick to establish emergency support funds in collaboration with other partners.

From a learning perspective, these outcomes are important, but it's also worth unpacking the processes that led to them and what that may mean going forward.

> **Webinar on asking powerful questions**
> 46 minutes
> Watch the How to Ask Powerful Questions webinar by the Center for Evaluation Innovation.
> Excerpt: "The kinds of questions we often pose — Did the intervention work? What are we learning about a particular issue? — may lead to information that is a useful input into learning, but they often don't help us determine what to do next. This habit results in questions that, if answered, will make a difference in how we do our work."

In Learning in a Time of Crisis, Preskill and Cook offer a set of reflective questions based on time periods to help foundations make sense of emergent learning opportunities in times of crisis. These include:

Within days and weeks (short-term)
- What options are available? What are the possible consequences of each?
- What assumptions or inferences are we making?
- What do we need to change in how we are responding?

A few months from now (intermediate-term)
- What options did we consider as we selected our behaviors/actions?
- What would we want to do again, since it worked so well?
- For whom did our responses most benefit? Least benefit?

When the crisis abates (longer-term)
- What have we learned from how we (and potentially others) engaged in rapid-response funding strategies and practices?
- What changes should our organization consider making to prepare for future crises?
- What will we remember from this situation?

It is also important that foundations ask themselves some potentially uncomfortable questions. The reality is that foundations are well-placed to survive the pandemic. The crisis' impact on foundations is unlikely to be as severe as it is on others. Organizations with strong learning cultures are able to ask themselves powerful questions that can prompt a deep reflection about how things work and what's really important. However, questions that promote learning are not always the ones that can be easily or quickly answered.

> **Reading:** Essential Questions for Foundation Boards in a Time of Crisis
> 3 minutes
> This short blog post poses some important questions to consider written by BoardSource President & CEO, Anne Wallestad.

The best kind of learning often happens in interaction, not isolation. This means reaching outside of your foundation and connecting with others.

Lots of foundations already do this through regular email, phone chats, and (in non-pandemic times) site visits.

Now, there is even more need to reach out, connect, and listen to others. This pandemic has shown that we are all affected and so there is strength in acknowledging and hearing from others about the challenges they face as well as how they are responding to this crisis.

Listening is a key component in figuring out what steps to take next. This means being proactive and checking in with your grantees and others in your network. Remember that you don't have to — and often can't — figure out everything you want to share or commit to before picking up a phone or writing an email.

It's also true that power dynamics can be a significant factor in relationships between foundations and grantees. This can be a real barrier in having honest conversations and learning what grantees really need right now. One funder noted:

I think we have to operate from a fundamental position of humility. We are certainly not as important as everybody who wants money from us tells us we are. The incentives to flattery in this business are higher than almost any other one I can think of. And the incentives not to be straightforward and share shortcomings with the funder are also very high.[6]

Approaching conversations with humility and honesty is one way that you can model your own learning culture and demonstrate your commitment to seeing your grantees succeed to the best of their abilities.

> **Foundation listening practices field scan**
> Read Bridging the Gap: A Review of Foundation Listening Practices commissioned by The William and Flora Hewlett Foundation. This field scan examines and draws lessons from the listening practices of other foundations.

> **Reading:** Six Tips for Funders to Listen Well Right Now
> 5 minutes
> Excerpt: "Listen only when you're willing to act. Listening is not free — neither for the people being listened to nor for the folks doing the asking"

3.1 Gather feedback

Gathering feedback is one element of listening and there are many ways to do this.

One tactic is to include a question on a grant report asking for feedback.

- However, this approach on its own may not surface the true feelings of a grantee. If a grantee fears that their funding could be cut or not renewed, they may be inclined to say nice things rather than honest things.

Another tactic is to use an external organization to gather anonymous feedback.

- This provides more distance between the grantee and the foundation and can encourage more honest feedback if they know that their words will be anonymous. In 2018, The Counselling Foundation of Canada, Lawson Foundation, and the Laidlaw Foundation took this approach with a project called Grantee Voices to gather feedback from their grant recipients with support from Grantbook. While this approach can be more of a financial investment, it tends to generate more focused insight.

Open "listening circles" are a third tactic to be considered.

- Threlfall, Tuan, and Twersky write that "Many organizations are inundated with well-meaning surveys from funders. Instead, try more personal connections — aided by technology — to ask about concerns and specific needs. Many nonprofits are craving meaningful conversations with other organizations about how they are managing during this crisis".[7]

> **COVID-19 grantee feedback questions**
> The Center for Effective Philanthropy has created a rapid response, five-minute grantee feedback tool "to help funders better understand the pressing needs of their grantees and other partners now".

4. Be an advocate

Foundations can't succeed in achieving their missions without strong and resilient charitable and nonprofit partners. These are the organizations on the ground and in the communities working toward positive change.

Philanthropy should reflect on what supporting advocacy means not only in terms of how foundations use their grant dollars, but also in how they frame their support and the language they use. For instance, The Frameworks Institute in the U.S., highlights three ways philanthropy can do this:

1. **Connect what policymakers do today with future outcomes that matter to us all.**
   Instead of saying the nonprofit sector needs relief….
   Try the nation needs the nonprofit sector

2. **Be clear that NGOs have a distinct role — different from what businesses and government can do.**
   Instead of 'nonprofits are as important as business and just like government'…. Talk about the unique role and contributions of not-for-profit organizations

3. **Be clear about the need for — and our sector's commitment to — equity and inclusion.**
   Instead of leaving disparities until the end…
   Center the call for equity and inclusion"[8]

Supporting advocacy means more than simply funding grassroots movements or lobbying governments for instance. From a learning perspective, it also relates to listening and considering where the information that informs your thinking comes from.

For example, nonprofit and charitable intermediaries like the Community Sector Council of Nova Scotia, the Ontario Nonprofit Network, the Saskatchewan Nonprofit Partnership, the Alberta Nonprofit Network, and others have done surveys into the impacts of COVID-19. Their research has helped to highlight the needs as well to raise the profile and advocate for more support for nonprofit and charitable organizations.

Advocacy is an important part of the philanthropic and nonprofit sectors. It helps to both highlight and push issues forward. While it's not always seen as a priority for foundations, it nonetheless requires skills and resources to do well. It also requires allies and an understanding that foundations, nonprofits, and charities are fundamentally in the same ecosystem and need each other to succeed.

> **Reading:** Philanthropy, this is our Matrix moment… what will you choose?
> 9 minutes
> Excerpt: "For those of us in a position to redistribute resources to frontline communities, this is a moment in which we must urgently act with moral clarity and choose which side of history we want to be on."

5. Embrace uncertainty

Embracing uncertainty, therefore, means coming to grips with the situation we're in and being cognizant of various mental traps that can inhibit action.

Foundations work in complex environments seeking to address the thorniest of issues like poverty, homelessness, and climate change. During this COVID-19 crisis, the level of uncertainty is even higher and many of those issues are even more critical to address. Many charities and nonprofits have been forced to close their doors, and many others are struggling to prevent this. For this reason, foundations are being challenged to respond when things are changing quickly and the need is great.

Managing uncertainty is not something that comes easily to many people. The same is true for foundations. For example, "decision inertia" is a mental trap where the decision-maker, facing many options, becomes overwhelmed and fails to act.[9]

While there is no playbook for how foundations should respond, one challenge that foundations should be aware of as they engage with their grantees has to do with trust and communication. In Staying on Track in an Unpredictable World: Three Ways to plan and manage future risks to impact, Kotler writes:

> *Setting aside funds for emergencies won't have an impact if grantees don't share with us when things go wrong. There is a trust and communication gap that gets in the way of having transparent and upfront conversations about risk and failure. If nonprofits are reluctant to ask for extra help, because they are afraid that such requests would compromise their ability to apply successfully for future grants, they may choose instead to scale back their ambitions in favor of being on time and on budget.*

Thinking more internally, Ruedy and Moss offer up a set of principles to help inform decision-making:

1. **BE INTENTIONAL**: give proper weight to the decisions that really matter.
2. **FRAME DECISIONS**: be explicit about what decision is being made, and why.
3. **RECOGNIZE COMPLEXITY**: invest in understanding the system to help you improve your predictions.
4. **NAVIGATE UNCERTAINTY**: be clear about whether new information would change your mind.
5. **USE INFORMATION**: prioritize information that would help you reduce uncertainty.
6. **RIGHT-SIZE ANALYSIS**: be realistic about the degree to which information will help you reduce uncertainty or change your decision.
7. **FOCUS ON THE FUTURE**: use forecasting to identify potential outcomes, and be explicit about their likelihood.[10]

Uncertainty on the scale of a global pandemic can be both scary and immobilizing as it's not always clear what next steps can or should look like. However, foundations are well-placed to react in meaningful ways and can use this moment in history to learn more about what really matters to them and how to best reach those decisions.

> **Reading:** How to make the right decisions under pressure
> 6 minutes
> Excerpt: "Good decision-makers judge when further delay will end up costing more than any decision they take."

6. Rethink accountability

A long-held critique of philanthropy relates to the kinds of restrictions some foundations put on their grants. Oftentimes, these restrictions have to do with how foundations think about accountability.

There is nothing wrong with accountability on its own. There are very legitimate reasons why a foundation would want to know how its money was spent or to ask questions that could help inform future decision-making. However, it's important to recognize that when accountability is one-directional in favour of the information needs of foundations, it can have a negative impact on the needs of grantees and their relationship to foundations.

From a grantee perspective, a relationship defined by accountability can look like being asked to collect data and answer questions that are sometimes irrelevant or inappropriate, potentially take a long-time to complete (particularly so if the grant is relatively small), and that, upon completion, are never mentioned or seen again. It may mean having limited interaction with foundation staff and having nowhere to go to ask questions. Some grantees may feel that their funder is not interested in hearing from them and feel discouraged from reaching out or asking questions. Funders may reinforce this perspective by making it difficult to connect either by being slow to respond (if at all) or not communicating how, when, and for what purposes they can be reached.

At its most extreme, this can mean that foundations end up misusing their grantees' time and resources and create distrust about the foundation's true intentions. At its most extreme, this can mean that foundations end up misusing their grantees' time and resources filling out paperwork and answering questions whose purpose isn't clear, while also raising questions about the commitment of the funder to really understand the issues they seek to address. It may also mean getting back information that is not reflective of what's actually happening.

On the flip side, accountability can also include being accountable to the organizations and communities that foundations support. This might mean asking questions and designing processes that focus more on how foundations can best support their grantees and learn with them. This may include involving grantees and community members in the design and evaluation of processes and ultimately being more open to co-creation and letting go of some control.

More broadly, foundations should think about their place in society and how they can be accountable to the broader public agenda on the issues they seek to address. As Gates and Rourke write, "*Philanthropy should ask itself:* How can we improve our working relationship with citizens and demonstrate respect?"[11]

Rethinking accountability, therefore, can mean approaching your relationship to your grantees with more focus on learning together about what matters to both of you.

> **Reading:** Foundations Must Rethink What It Means to Be Accountable
> 5 minutes
> Excerpt: "But as foundations try to show more impact, their actions can appear unilateral and unaccountable. Foundations are increasingly choosing, and even implementing, solutions themselves, as opposed to responding to the ideas of others."

> **Accountability and transparency**
> GlassPockets is a Foundation Center initiative that champions philanthropic transparency. As part of their work, they have defined a set of indicators to help foundations determine how transparent their practices are.

7. Make use of evaluation

The challenge for grantmakers is to weave evaluation into the fabric of what they do every day, and to shift the focus of this work so it's about improvement, not just proof.[12]

Philanthropy still has a way to go before it can deliver on the true promise of evaluation to drive learning and deliver better results for organizations and the communities they serve. Many foundations use evaluation to better understand the impact of their investments. They may evaluate a granting program, for instance, to enable them to describe what change has occurred, inform whether any tweaks need to be made, or whether the program should continue at all. Evaluation can also be used by foundations to better understand how they can support their grantees (for example, with grantee feedback tools).

No matter the use, when done well, evaluation is a tool to support learning. As Taylor and Liadsky note:

Yet, the best evaluations should lead us to say, "that's amazing, we should tell everyone" or "I never thought about that before; we should give that a try." Or even "that makes absolutely no sense." When it is well designed, an evaluation should teach us things that we don't already know.[13]

What makes evaluation useful? Research suggests that the following six factors are key to a useful evaluation:

• A clear, shared purpose
• Specific people committed to meaningful use of the evaluation
• A plan for ongoing communication that ensures buy-in and transparency
• A match between expectations, skills/capacity, and funding
• A process to ensure that there is a safe space for critical reflection and learning
• Follow-through[14]

The technical factors of evaluation (such as designing a good logic model or being highly skilled at building surveys), while important, are less likely to be predictors of a useful evaluation than those mentioned in the list above.

Getting started with evaluation
A great resource to get started with evaluation is BetterEvaluation.org. It is a clearing house of resources related to evaluation and can be a helpful starting point for those looking to learn more.

7.1 Managing an evaluation in progress

Foundations that are currently in the middle of an evaluation process may find themselves wondering what to do. Depending on the context, it may not be possible to carry out certain evaluation activities as planned whether due to public health guidelines (such as social distancing) or simply that there are other priorities and needs. However, there are a few things to keep in mind if you are proceeding with your evaluation work. First, go back to your evaluation plan or framework and ask yourself some questions:

1. Who do I need to connect with?
2. What are my key evaluation questions?
   Do they still hold value?
3. What data do I already have?
   What insights can I draw from this?
4. What more might be gained by further data collection methods in the immediate term?
5. What data collection methods (e.g., surveys, focus groups, etc.) can I still do?
6. When is the right time to gather this data?
   How can I do this respectfully?

Depending on your answers to any of the above questions, you may need to adjust your evaluation plan.

• For instance, if you already have a fair bit of data collected, you may be able to shift toward more analysis work and focus on what partial insights can be derived right now.
• Alternatively, it's possible that social distancing measures or economic hardship may mean that some data collection methods are not feasible. In this case, consider whether you can gather information in another way such as through a survey or an online focus group (provided that participants have the technology to participate).

Facilitating online conversations
The Definitive Guide to Facilitating Remote Workshops produced by MURAL offers lots of good tips and advice for how to run an online workshop.

Second, as evaluator Michael Quinn Patton suggests, adopt a "good enough" standard of rigor:

- Detach from rigor as an absolute methodological standard…. Decisions are being made quickly. Some data to support those decisions when they are made is better than data that are too little and too late. This places "rigor" in the context of crisis conditions, acknowledging uncertainty, emergence and urgency. For example, a smaller purposeful sample of interviews with a few diverse program staff and participants may be done more quickly, and be more useful, than developing and administering a full survey.[15]

Third, remember that there are lots of potential sources for data. A good evaluation relies on more than one source of data. Therefore, consider thinking about some unusual suspects to help supplement grantee or program participant data.

- For instance, perhaps a similar program has been run in another location for which an evaluation may already have been conducted and could be useful as a comparison.

- Or, if you're interested in looking at the larger context that your grantees or program operates in, there may be higher level population data available from a government agency.

Looking for data?
Have a burning question and think someone might have written something about it already? IssueLab is a "searchable, browseable website set up to collect and share the social sector's knowledge." It is a platform that supports ongoing learning and research in the sector and allows organizations to upload their own content to share with others.

Fourth, if you're working with an external evaluator, know that they are there to help you. Even if an evaluation is on hold or needs to be altered, reach out to your evaluator and connect on whether there are alternative ways they could be helping right now.

- Perhaps they may be able to shift their focus to supporting different kinds of data collection or research efforts.

- Perhaps they may be able to support the evaluation needs of your grantees during this time.

Evaluation PD
2 ½ hours or less
Evaluation for Leaders is "a freely accessible mobile learning course that is designed to quickly increase your understanding of evaluation by maximizing those stolen moments of productivity in your busy day. It is a professional development course that you can access on our laptop, phone, or tablet, anywhere, anytime. The intent of this course is not to teach you *how* to do evaluation, but rather how to *better* use evaluation in your day-to-day decision making and organization overall."

7.2 Welcome diverse voices and perspectives

Evaluation is best done when there is a clear and shared understanding of why an evaluation is needed and how it will be done. This means making sure that evaluation participants have a voice in the process. Remember that behind each data point can be a person. Similarly, how you interpret data may differ from how someone else interprets data. If these points are not considered or understood, tension may arise between those who are collecting information and those who are giving information.

According to a survey of foundations on evaluation practices by the Center for Evaluation Innovation, "Just over half of foundations reported considering the cultural appropriateness of methods and diversity of evaluation teams when conducting and commissioning evaluations."[16] Yet, the study also found that "71% of foundations reported only occasionally or never giving communities being evaluated the power to shape and participate in the evaluation process."[17]

The Ontario Federation of Indigenous Friendship Centres (OFIFC), for instance, has developed a set of principles (Utility, Self-voicing, Access, and Inter-relationality) to help guide research projects led by OFIFC and urban Indigenous communities. These principles define the terms under which research and evaluation should be designed so that they are culturally appropriate, respectful, and relevant to those involved. As stated in their USAI Research Framework: "The ultimate assessment of project and program 'validity and reliability' is in the hands of the community and we emphasize that no translation, interpretation, or validation is needed for those 'data' to declare them accurate and authentic from any research perspective."[18]

In short, evaluation should be useful. Even in uncertain circumstances, evaluation can play a valuable role in informing strategic decision-making, promoting learning, and building relationships with stakeholders.

Medicine Wheel Evaluation Framework
The Medicine Wheel Evaluation Framework is an example of one evaluation framework that attempts to centre relationships and expand the realm of what can be evaluated and how.
Excerpt: "Traditionally, the Medicine Wheel is meant to make sense of the world and bring order to it, without isolating or compartmentalizing our different understandings of it. It celebrates both the diversity and unity of our spiritual, mental, physical, and emotional experiences. These four categories make up its four quadrants."

Equitable Evaluation Framework
The Equitable Evaluation Framework outlines three principles for advancing equity in evaluation practices to help "lift up the historical, contextual, and powerful dynamics that create and sustain oppression and shed light on the strategies and solutions which can shift the "'rules of the game.'"

CONCLUSION

The seven tips presented in this guide offer a starting point for foundations to reflect on learning and evaluation practices in this time of crisis. These times are complex and the importance of learning is as important as ever. As foundations increasingly think about their place and role in addressing the challenges brought on by COVID-19, there is also an opportunity to think more about their relationship to learning and evaluation.

Many foundations deserve credit for their responses to this crisis. They have been challenged to respond and operate in new ways. These ways of working such as being responsive, having more communication with grantees and partners, rethinking reporting requirements, and being more flexible don't have to disappear once this crisis is over.

Learning is an ongoing process. New questions are continuously generated. This is not something to run away from, isolate, or think can be done later. Rather, as many foundations have demonstrated during COVID-19, it is a process that should become core to how your organization works, a value to continue striving for, and an opportunity to improve how you do your work and support others.

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ENDNOTES

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15 Beer, et al. 2020, 16.
16 Ibid.
17 Ontario Federation of Indigenous Friendship Centres (OFIFC) 2016, 10.

RESOURCES

For foundations to advance equity and inclusion in a time of COVID-19
To find a list of resources updated on a monthly basis, click here.

Tools

Organizational Learning Self-Assessment Tool By Taylor Newberry Consulting.
This tool is meant to help organizations identify and assess the state of learning in their organization. It can be a helpful starting point for discussion that can identify areas of strength as well as areas for improvement.

Rapid Response Grantee Survey By the Center for Effective Philanthropy
This survey is designed to help funders better understand the pressing needs of their grantees and other partners now.

GlassPockets A Foundation Center initiative
A defined a set of indicators to help foundations determine how transparent their practices are.

BetterEvaluation.org
"BetterEvaluation.org has information on more than 300 methods and processes plus approaches and thematic pages, events and resources including a **Manager's Guide to Evaluation**, and a Terms of Reference generator, the **GeneraTOR**."

The Definitive Guide to Facilitating Remote Workshops By MURAL
Tips and advice for how to facilitate online workshops.

IssueLab By Candid
IssueLab is a "searchable, browseable website set up to collect and share the social sector's knowledge."

The **Medicine Wheel Evaluation Framework** By the Atlantic Council for International Cooperation
Excerpt: "Traditionally, the Medicine Wheel is meant to make sense of the world and bring order to it, without isolating or compartmentalizing our different understandings of it. It celebrates both the diversity and unity of our spiritual, mental, physical, and emotional experiences. These four categories make up its four quadrants."

Blogs & Articles

What Will it Take for Philanthropy to Learn? By Reisman, Coffman, Beer, Rae, and Millett
Excerpt: "The stakes are high to get learning right. Many helpful tools to facilitate learning have been developed, but so far we have lacked clarity on the changes we want learners individually, in teams, and in organizations to experience. The sector needs to think rigorously about what constitutes high-quality, actionable, and equitable learning, and what it really takes to make it happen."

Learning in a Time of Crisis By Preskill and Cook, FSG
Excerpt: "The need to learn about the effects, influences, and impact of how organizations are responding to the crisis—through data and experiences—will be critical if philanthropy is to be effective in the short-, intermediate-, and long-term."

Essential Questions for Foundation Boards in a Time of Crisis By Wallestad, BoardSource.
Excerpt: "There's no question: significantly increasing payout is a big decision. It's a decision that gets at the heart of who you are as a foundation and an institution. It's driven by your reason for being, your philanthropic goals, your strategy, and your institutional values. And it is for all of those reasons that it's just a big decision; more specifically, it's a big board decision."

Six Tips for Funders to Listen Well Right Now By Bolduc, Center for Effective Philanthropy
Excerpt: "Listen only when you're willing to act. Listening is not free — neither for the people being listened to nor for the folks doing the asking."

How to make the right decisions under pressure By Leslie, BBC
Excerpt: "Good decision-makers judge when further delay will end up costing more than any decision they take."

Philanthropy, this is our Matrix moment...what will you choose? By Kawaoka-Chen, Justice Funders
Excerpt: "For those of us in a position to redistribute resources to frontline communities, this is a moment in which we must urgently act with moral clarity and choose which side of history we want to be on."

Staying on Track in an Unpredictable World: Three ways to plan and manage future risks to impact By Kotler, Open Road Alliance
Excerpt: "Now, more than ever, grantmakers can support their grantees through policies designed to soften the blow of risks realized today, and build resilience for the uncertainty of tomorrow."

Foundations Must Rethink What It Means to Be Accountable By Gates and Rourke, The Chronicle of Philanthropy
Excerpt: "But as foundations try to show more impact, their actions can appear unilateral and unaccountable. Foundations are increasingly choosing, and even implementing, solutions themselves, as opposed to responding to the ideas of others."

Evaluation Implications of the Coronavirus Global Health Pandemic Emergency By Quinn Patton, Blue Marble Evaluation
Excerpt: "Channel your sense of urgency into thinking pragmatically and creatively about what data you can gather quickly and provide to your evaluation users to help them know what's happening, what's emerging, how needs are changing, and consider options going forward."

Reports
Bridging the Gap: A Review of Foundation Listening Practices By Threlfall and Klein, ekouté
Excerpt: "Moreover, as the contextual landscape around philanthropy continues to shift, foundations are being pushed to take unprecedented action on issues like equity, diversity, and inclusion, and are facing increased calls for participation and transparency. Listening and connecting with those they seek to help is one way foundations can become more inclusive."

Achieving Greater Impact by Starting with Learning: How grantmakers can enable learning relationships at the grant application stage By Taylor and Liadsky, Taylor Newberry Consulting.
Excerpt: "For the same reasons that farmers must know a lot about the soil into which they plant their seeds, grantmakers interested in evaluating the impact of their investments must develop a deep understanding of organizational learning culture."

Equitable Evaluation Framing Paper By the Center for Evaluation Innovation, Institute for Foundation and Donor Learning, Dorothy A Johnson Center for Philanthropy, and Luminare Group.
Excerpt: "If we do not work in this way, and if foundations do not support evaluators to work in this way, and non profits do not or cannot resource this type inquiry, evaluation practices risk reinforcing or even exacerbating the very inequities the change initiative seeks to address."

Benchmarking Foundation Evaluation Practices 2020 By the Center for Evaluation Innovation
Excerpt: "Boards are overall supportive of evaluation, but senior leadership behaviors in support of evaluation and learning fall short."

Training
How to Ask Powerful Questions [Webinar] By Beer, Center for Evaluation Innovation.
Excerpt: "The kinds of questions we often pose — Did the intervention work? What are we learning about a particular issue? — may lead to information that is a useful input into learning, but they often don't help us determine what to do next. This habit results in questions that, if answered, will make a difference in how we do our work."

Evaluation for Leaders By Lovato and Hutchinson, University of British Columbia
"A freely accessible mobile learning course that is designed to quickly increase your understanding of evaluation by maximizing those stolen moments of productivity in your busy day. It is a professional development course that you can access on our laptop, phone, or tablet, anywhere, anytime. The intent of this course is not to teach you how to do evaluation, but rather how to better use evaluation in your day-to-day decision making and organization overall."

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