

FOUNDATION 3.0

Strategic Round Tables

Deploy all foundations assets for positive systemic change

Evaluating the contribution of foundations to societal change

Brussels • 29 & 30 January 2015

► Venue

Philanthropy House
Rue Royale, 94
1000 Brussels – Belgium



With courtesy of

► Objectives

1. To gain greater clarity about the nature of societal change and social innovation
2. To gain greater understanding of strategic approaches towards monitoring, evaluation and learning of social change and social innovation in a complex non-linear world
3. To identify follow up questions and issues for session in June 2015

► Overall framing question

What are the most appropriate methods for monitoring, evaluating and learning from foundation programmes designed to produce societal change and social innovation?

► Faculty

- **Avila Kilmurray**, Global Fund for Community Foundations and formerly Community Foundation for Northern Ireland
- **Julia Coffman**, Center for Evaluation Innovation
- **Lisa Jordan**, Porticus and formerly Bernard van Leer Foundation
- **Hope Lyons**, Rockefeller Brothers Fund
- **Tim Draimin**, Social Innovation Generation
- **Barry Knight** (facilitator), CENTRIS and Webb Memorial Trust

► Agenda

Day 1: Thursday 29th January

17:30	Welcome drink
18:00	Welcome, goals of the round table, presentation of participants
18:20	Evaluating the contribution of foundations to societal change This session will outline some of the previous work done in this sphere and identify what this workshop will contribute to the field
19:10	<i>Short walk to the restaurant</i>
19:30	Dinner

Day 2: Friday 30th January

08:30	The roles of foundations in societal change and social innovation This session will address what change means in a complex non-linear world. It will address the topics of structure and agency, and how they are related. It will consider the role of social innovation in creating societal change. It will identify the roles that foundations play in societal change and how they could perform these roles better.
10:15	Break
10:30	What are the options for developing an evaluation strategy in a complex non-linear world? In this session, we will focus on practical examples of what methods have worked well and less well in strategies for evaluation. What are the differences between evaluating individual grants and evaluating grant programmes? What are the constraints (e.g. money, time, method, expertise, specificity of context, risks, etc.) and how can they be overcome?
12:00	Identification of key issues emerging In this session, we will attempt to synthesise what has emerged so far and identify work points for further development.
12:30	Lunch

13:30	Debate on 'strategic' versus 'emergent' methods of evaluation
	In this session, we will consider the recent controversy over 'strategic' and 'emergent' philanthropy and how this affects our approach to evaluation. Is the correct approach (ex-ante) 'planning' or 'developmental'? This will lead into a discussion about power, risks and expertise in the relationship between foundation and its grantee partners.
14:45	Break
15:00	What are the key questions and quandaries emerging?
	This session will involve a discussion of topics emerging from the day for further work. We will also set the priorities for the June meeting and discuss any immediate follow up work from the current session.
16:00	Evaluation of day
16:15	Close
16:30 – 17:30	Steering Committee (partners only)

► Faculty members

Avila Kilmurray, Global Fund for Community Foundations and formerly Community Foundation for Northern Ireland (IRL)



Avila, born in Dublin, was educated in University College Dublin (History/Politics); Australia National University (International Relations); and Queens University Belfast (PhD Governance & Hon. PhD - Social Sciences). Avila worked in community development and peacebuilding in Northern Ireland since 1975, while also being an activist in the Women's Movement. She worked in a University-based community education project (1977-1980); the Northern Ireland Council for Voluntary Action/Rural Action Project (1980-1990); as Women's Officer, Transport & General Workers Union (1990-1994); and Director of the Community Foundation for northern Ireland (1994-2014). Avila is currently Director Policy & Strategy with the Global Fund for Community Foundations. Avila was a founder member of the Northern Ireland Women's Coalition, being on its negotiating team for the 1998 Belfast Agreement. She has written extensively on the Women's Movement, peacebuilding, philanthropy and community activism. She is a Board member of Conciliation Resources (UK) and a member of the Working Group on Philanthropy for Social Justice and Peace.

Julia Coffman, Center for Evaluation Innovation (USA)



Julia Coffman is director and founder of the Center for Evaluation Innovation. She has more than 20 years of experience as an evaluator, and specializes in evaluation that supports strategic learning, particularly for advocacy, public policy and systems change efforts. She is also co-director of the Evaluation Roundtable, a network of foundation evaluation leaders that seeks to improve how foundations learn about the results of their grantmaking and increase the impact of their work. For 15 years Julia worked with the Harvard Family Research Project, a research and evaluation organization at the Harvard Graduate School of Education. Julia led HFRP's evaluation work for over a decade, which included evaluating foundation and nonprofit initiatives and publishing *The Evaluation Exchange*, a nationally renowned periodical on emerging evaluation strategies and issues.

Lisa Jordan, Porticus and formerly Bernard van Leer Foundation (NL)



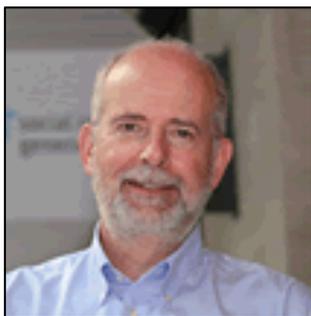
Lisa Jordan has joined Porticus in September 2014, in the position of Senior Director of Strategy and Learning. She has worked on strengthening democracy and civil society through positions with NGOs, governments and private philanthropic foundations for twenty years. Before joining Porticus, Lisa was Executive Director of the Bernard van Leer Foundation. In this position she oversaw programmes and operations that impact over a million disadvantaged young children every year. Prior to joining the Bernard van Leer Foundation, Lisa served for nine years with the Ford Foundation as Acting Director and Deputy Director of the Governance and Civil Society Unit. She has acted as a consultant for numerous foundations in the fields of development and environment.

Hope Lyons, Rockefeller Brothers Fund (USA)



Hope A. Lyons is director of program management for the Rockefeller Brothers Fund. In this capacity she works with staff across the Fund to ensure strategic management of its grantmaking and program operations. She also leads the Fund's philanthropic stewardship grantmaking, which supports the field of philanthropy and leading practices in the nonprofit sector. Ms. Lyons started her career as a Peace Corps volunteer in Romania where she worked on microcredit and business training initiatives. Prior to joining the Fund, she was the grants manager at the Commonwealth Fund. She has worked on a range of economic development projects in Eastern Europe and Southeast Asia supported by USAID, the World Bank, the United Nations Capital Development Fund, and the Asian Development Bank, and coordinated activities related to the 2002 Second World Assembly on Ageing in Madrid in conjunction with the International Longevity Centre, an alliance of organizations committed to help societies address longevity and population ageing in positive and productive ways. Ms. Lyons holds a Bachelor of Arts in economics and international studies from The Johns Hopkins University as well as a Master of Public Administration from New York University, with a concentration in international development and financial management. Active in the nonprofit sector, she has served on a number of boards and committees, and is currently active on the Increasing Diversity in Philanthropy committee of Philanthropy New York and the Global Alliance for Community Philanthropy.

Tim Draimin, Executive Director of Social Innovation Generation, The McConnell Family Foundation (CA)



As Executive Director, Mr. Draimin supports SiG's growing network of academics, practitioners, social entrepreneurs, allied institutions and partnerships in expanding Canada's Social Innovation ecosystem. Tim is the author of Canada's first national study of social entrepreneurship and a frequent advisor to government, non-profit associations and business. A leader in the non-profit sector, Mr. Draimin was the founding CEO of Tides Canada Foundation. Mr. Draimin guided the Foundation's expansion, established Canada's first national support system for social entrepreneurs – Tides Canada Initiatives – and supported a world-renowned model of integrated conservation: B.C.'s Great Bear Rainforest initiative.

Tim Draimin has worked for or consulted in Canada and abroad with the Canadian Council for International Co-operation, the International Development Research Centre, Synergos, and Ford Foundation. He has served on many international delegations and participated at UN prepcoms. He was a member of Canada's official delegation to UNCED.

An active volunteer, Tim serves on the boards of the Catherine Donnelly Foundation (Toronto) and the TRICO Charitable Foundation (Calgary). Tim is a senior advisor to the new MaRS Centre for Impact Investing (CII), a hub created to increase the awareness and effectiveness of social finance by catalyzing new capital, talent, and collaborative initiatives to deliver innovative solutions to Canada's social and environmental challenges. He was an advisor to Community Foundations of Canada's Responsible Investing Pilot Project and a past board member of the Social Investment Organization (SIO), Canadian Environmental Grantmakers Network (CEGN), IMPACS, and past member of the Voluntary Sector Forum's Finance Action Group.

Barry Knight (facilitator), CENTRIS and Webb Memorial Trust (UK)



Barry Knight is Executive Director of CENTRIS, and an adviser of the Global Fund for Community Foundations, particularly in the areas of evaluation and knowledge management. He is a social scientist who has worked for the UK government as adviser on policy and grants for non-profit organisations. His early career was spent in research and teaching at Cambridge University and he later worked for the European Commission. He has written books on economic development, family policy, inner cities, the voluntary sector, and social enterprise.

Over the years, he has evaluated programmes for Ford, Mott, Bertelsmann, Atlantic Philanthropies and others. He has experience of evaluating ambitious programmes, such as the International Network on Strategic Philanthropy, the Community Foundation Fellowship Programme, City Bridge Trust's Access to Buildings Program, WINGS, as well as two Ford Foundation programs: the Community Philanthropy and Civic Culture Program and the International Initiative to Strengthen Philanthropy.

Barry developed (with others) innovative tools on impact assessment. His play 'Kirsty and the Evaluators' (jointly written with Lisa Jordan of the Bernard Van Leer Foundation) was first shown at an international gathering of philanthropists in Cairo using Egyptian actors in 2009. A video of this performance was shown, to much acclaim, at the European Foundation Centre Conference in June 2010. He was part of the team that is developing entertaining approaches to learning about evaluation, including 'Impact Island' at the EFC meeting in 2010 and 'Risky Business' at the EFC meeting in 2012. He facilitated the 2012 European Learning Lab on Evaluation in which a group of foundation executives have come together to advance the field of evaluation in philanthropy.