

FOUNDATION 3.0

Strategic Round Tables

Deploy all foundations assets for positive systemic change

Contribution of foundations to societal change: evaluation tools and practices

Brussels • 26 & 27 November 2015

► Venue

Philanthropy House
Rue Royale, 94
1000 Brussels – Belgium



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► Objectives

More and more, foundations are being asked to account for their impact. People are asking: “What do foundations achieve through their investments?” “What changes do they bring to their societies?”

Foundation 3.0 has been working on these issues, and held a first meeting in Brussels in January, which made headway on the theoretical issues involved in evaluation for societal change. In November, Foundation 3.0 will follow this up with a **practical “hands-on” meeting** built on particular examples of impact assessment in foundations. We will review different cases, and identify what participants can borrow for their own situations.

► Overall framing question

The session will focus on practical “take-aways”. It will concentrate on designing specific approaches, identifying appropriate methods, while keeping costs low, and using the evaluation with different stakeholders. We will consider the “OURS” principle of evaluation, namely that impact assessment needs to be “owned”, “useful”, “robust” and “simple”.

Participants will have an opportunity to bring their own evaluation designs and work on them during the session.



▶ Faculty

- **Gian Paolo Barbetta**, Manager Strategic Unit for Philanthropy, Fondazione Cariplo (IT)
- **Michael Feigelson**, Executive Director, Bernard van Leer Foundation (NL)
- **Bettina Windau**, Director, Bertelsmann Stiftung (DE)
- **Barry Knight** (facilitator), CENTRIS and Webb Memorial Trust (UK)

▶ Agenda

Day 1: Thursday 26th November 2015

15:30	Welcome drink
16:00	Introductions
16:30	Presentation Gian Paolo Barbetta, Manager Strategic Unit for Philanthropy, Fondazione Cariplo
17:30	Discussion
18:30	Close
19:00	Dinner

Day 2: Friday 27th November 2015

08:30	Group work on developing evaluation systems within foundations
10:00	Presentation Bettina Windau, Director, Bertelsmann Stiftung
11:15	Coffee break
11:30	Presentation Michael Feigelson, Executive Director, Bernard van Leer Foundation
12:45	Lunch
13:45	Problem solving session
15:30	Summary of key learning points
16:00	Evaluation
16:15	Close
16:30 – 17:30	Steering Committee (partners only)

► Faculty members

Gian Paolo Barbetta, Manager Strategic Unit for Philanthropy, Fondazione Cariplo (IT)



Gian Paolo Barbetta is Head of the Evaluation Unit of the Cariplo Foundation and Professor of Economic Policy at the Catholic University of Milan. His professional work at the Cariplo Foundation is focused on the creation of adequate tools to measure the impact of the activities of the foundation.

His research work at the Catholic University is focused on the nonprofit sector and policy evaluation. In the first area, he paid particular attention to the role of the nonprofit sector in the Italian welfare system and its impact on efficiency in service provision; moreover, he has studied the role of grant-making foundations in supporting the nonprofit sector and in testing new policies. In the second area, he is particularly interested in the use of Randomized Controlled Trials in the field of social, educational and cultural policies.

Michael Feigelson, Executive Director, Bernard van Leer Foundation (NL)



Michael Feigelson has spent the last 15 years focused on working with governments, civil society and business to improve opportunities for children and youth. He joined the Foundation as a Programme Officer in 2007. He then held the positions of Programme Manager, Programme Director and Interim Executive Director.

Michael has degrees from Wesleyan and Princeton Universities where he spent much of his time focused on understanding the impact of social and economic policies on children and families; he serves on the World Economic Forum Global Agenda Council on Behaviour; and – most importantly – he is the proud new father of a beautiful baby girl who reminds him every day of the importance, the challenges, and the joy that comes with a child's early years.

Bettina Windau, Director, Bertelsmann Stiftung (DE)



Bettina Windau is Director at the Bertelsmann Stiftung. Since 1991, she has been responsible for education, philanthropy and civil society programmes in Germany, Spain, Egypt and Poland as well as international experts' networks and associations.

She is an expert for evaluation and organisation development. Since 2008 she contributes to the capacity building activities of the European Foundation Centre EFC in Brussels. As a volunteer she works as Chair of a Community Foundation.

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.