



# Barr Foundation Learning Example

This foundation learning example is part of the Approaches to Learning Amid Crises: Reflections from Philanthropy report, which showcases a series of learning examples aimed to support philanthropy in learning from doing while changes are still underway. In this report, we lift up examples of how foundations have reacted and, specifically, highlight what and how they are learning. We spoke with leaders from seven Canadian and American foundations to learn from their actions during the first several months of the 2020 crises related to COVID-19 and the widespread acknowledgement of systemic racism and racial inequity. We focused on what they did, how they did it, and what it means from the perspective of organizational learning and evaluation. This is one of those seven foundation learning examples.

At the heart of our inquiry, we were guided by these two questions:

- 1 How does a foundation's learning culture shape its capacity to act and adapt during a crisis?
- 2 How do relationships between funders and grantees shape their capacity to learn together?

We encourage you to reflect on these questions in your own context as you read through this case study.

Interviewees were asked to reflect on how their foundation responded during the first four months of the crises, beginning in March 2020 at the start of COVID-19 lockdowns in North America, and through the widespread protests in June 2020 after George Floyd's murder. Interviewees were asked to share what actions they took, and what informed their decision-making. Our conversation was semi-structured with the goal of telling instructive stories about how learning helped to shape action.

**This foundation learning example represents real-life experiences, but not necessarily best practices.**

It does not cover all aspects of the foundations' inner workings or thinking, but rather offers a point-in-time snapshot through the eyes of the interviewees. The issues explored here could be unpacked further and in much greater detail. As such, they may leave the reader with more questions than answers, which we consider a positive (albeit potentially frustrating) outcome.

# Barr Foundation

## Interviewee:

Yvonne Belanger  
Director of Learning and  
Evaluation

## Date:

June 2020

## Background

Based in Boston, Massachusetts, the [Barr Foundation](#) focuses regionally and selectively but engages nationally, working in partnership with others to elevate the arts and creative expression, to advance solutions for climate change, and to connect all students to success in high school and beyond. Barr was co-founded in 1997 by Amos and Barbara Hostetter, who are living donors and members of the Board of Trustees. In 2020, Barr had an annual giving budget of US\$95 million and about 45 staff.

## Responding in times of crisis

The Foundation started by thinking about its COVID-19 response as a long-term approach with sequenced phases of relief, recovery, and rebuilding/reimagining. A set of principles were developed to guide the response that committed the Foundation to:

- Not reducing grantmaking in 2020 or 2021, which would mean belt-tightening operationally
- Sustaining all existing commitments (overall planned grantmaking) and supporting existing partners across core programs with [as much flexibility as possible](#)
- Directing the response to places in the region where there are fewer philanthropic resources (i.e., beyond Boston)
- Focusing on populations disproportionately impacted and left out, including immigrants and undocumented families and individuals who can't access federal or state programs
- Supporting organizations closest to the populations and communities most impacted, as they are most in touch with those populations' needs

In mid-March, the Barr Foundation joined over 750 other organizations in signing a pledge that committed foundations to being flexible and responsive to existing grantees' needs. The Foundation would:

- Welcome a conversation about revisiting grant objectives, timelines, and terms
- Be flexible with deadlines for grant reports or other deliverables, and be open to alternative formats for such reports
- Commit to the timely release of grant payments
- Entertain requests to augment or accelerate approved grant payments
- Understand that events and other large meetings or conventions are likely to be postponed or canceled, and explore the implications

Barr also engaged in direct and indirect grantmaking to support COVID-19 relief efforts in the region. Each program team reviewed budgets and determined how much of their planned grantmaking for 2020 could be reallocated to a centralized fund to support a COVID-19 response.

In the first week of April, Barr announced US\$2.6 million in grants to community foundations and pooled funds that had been established in response to the pandemic. This included grants to support:

- Arts and creativity organizations through five community foundations with whom Barr already had partnerships and six additional Massachusetts community foundations to ensure that resources were available in other parts of the state. These grants supported emergency response funds, with community foundations making their own decisions about how to allocate funds.
- The Boston Resiliency Fund, established by Mayor Marty Walsh to provide food for Boston's children and seniors, technology for Boston Public Schools students, and support for first responders and health care workers.
- The Boston Foundation's COVID-19 Response Fund, which provided general operating support grants to organizations addressing the basic needs of vulnerable populations during the pandemic.

In addition to these contributions to pooled funds, Barr engaged in additional direct grantmaking. Barr primarily leveraged an existing short-term portfolio of grantees focused on civil rights and immigrants, renewing one-time general operating support grants that had previously been scheduled to end in spring 2020. Program teams in Arts, Climate, Education, and Sector Effectiveness also expedited supplementary grants to existing partners directly involved in responding to COVID-19. In total, Barr had awarded US\$4.6 million of emergency response ("relief") phase grants as of April 16, 2020.

Finally, the Foundation encouraged employees to leverage existing matching fund programs and also initiated a one-time staff-directed giving program.



**This was really meaningful for the staff during a very stressful time when we were all wanting to find ways to make a difference. It helped us to amplify our own personal philanthropy and to direct resources to personally meaningful causes, like a food bank in our neighborhood or a nonprofit provider.**



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## Learning Insights

Barr's goal of substantially reducing grantee burden included reduced outcome and reporting requirements and the conversion of some project grants to general operating support. By the end of May 2020, Barr had:

- Accelerated grant payments for three current grantees
- Waived reporting requirements for 21 grantees
- Amended eight grant agreements to repurpose some or all funds from project to general operating support, extend project timelines, or revise expected outcomes

For its emergency relief grantmaking, the Foundation readily accepted that it would not be possible or necessary to understand the impact of these general operating support grants. During later grantmaking phases (recovery and rebuild/reimagine), some evaluation-related work may be added.

“Pre-COVID, our 2020 learning and evaluation priorities were to focus on more fully implementing outcomes measurement to guide our ongoing strategy development. Because of increased workloads and the infeasibility of additional grantee data collection, we slowed this way down. In some cases, resources intended for outcome measurement were redeployed to field scans and research on COVID-19's impact on the context, and to inform strategic pivots over the next year and beyond.

The Foundation also has been building on efforts from recent years to develop a more open and inclusive learning culture. Program teams and Foundation leadership are engaging in real-time reflection and learning to capture key lessons to inform pivots in strategic priorities and tactics. In May 2020, multiple conversations across program teams, leadership, and the Board produced additional learning to guide Barr's response:

- **Uncertainty and planning for multiple scenarios.** The Foundation will need to plan for an unknown future, and considering multiple scenarios will be important.
- **Catalytic action.** Building on Barr's mission to serve as both a steward and a catalyst, the Foundation should embrace that latter role in this moment and identify the strategic ways it can inform action that can be catalytic.
- **Connectedness.** Rather than focus on recovery and rebuilding phases in silos, Barr should recognize the interconnectedness of systems and pursue an interdisciplinary approach that builds alliances across fields and shapes a recovery based on a wider spectrum of perspectives.

With staff working remotely, Barr Foundation President Jim Canales began sending an email to staff every morning, detailing what was on his mind to make his thinking visible and to maintain community. The cadence of all-staff meetings increased from bimonthly to monthly, and a new monthly meeting was initiated for program staff only to enable teams to more frequently share their analysis of the changed context and details of their response. In addition, these forums enabled new grantmaking processes to be rolled out more smoothly, with more rapid cycle iteration and improvement.

An important hallmark of Barr's internal COVID-19 response was distributed leadership of change. For example, Barr's IT team rapidly rolled out Microsoft Teams after the shutdown, shifting from a planned three-month rollout with a small pilot to a full rollout in less than one week. Within Teams, staff were given significant latitude to create new channels, which resulted in a wide range of new forums. As the protests following George Floyd's murder in Minneapolis intensified, Jim convened a virtual town hall in which many staff spoke openly about their concerns and struggles, as well as their personal experiences with racial injustice and systems of oppression. Additional Teams forums (e.g., a staff-lead reading group of Afro-futurism literature) sprang up in response.

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