



LEARNING:

The Infrastructure Philanthropy Can't Afford to Lose



CENTER FOR
EVALUATION
INNOVATION

Authors:

Clare Nolan, Engage R+D
Sonia Taddy-Sandino, Engage R+D
Hanh Cao Yu, Center for Evaluation Innovation
Kim Ammann Howard, The James Irvine Foundation
Marion Standish, formerly with The California Endowment
Charles Fields, The James Irvine Foundation

INTRODUCTION

In 2020, philanthropy proved it could rise to the occasion.

Faced with a global pandemic, uprisings for racial justice, and rising threats to democracy, philanthropy moved with unusual urgency. Grant cycles accelerated. General operating support expanded. Equity commitments deepened.

Philanthropic leaders leaned into real-time and participatory learning, hosting reflection sessions, surfacing field insights, and adapting strategy as conditions evolved. Funders strengthened their strategic capacity to both respond to the urgency of the moment and to keep sight of what lay ahead.

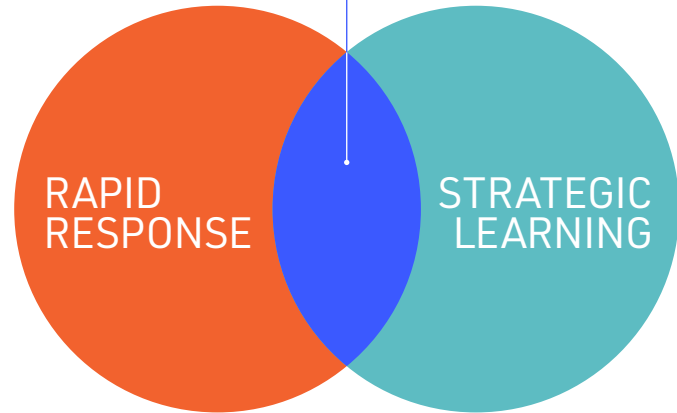
Once again, we find ourselves in crisis with the rise of authoritarianism, backlash to equity-focused work, burnout across the sector, and renewed uncertainty about philanthropy's role. At the same time, the learning infrastructure and tools that facilitated thoughtful, values-aligned, and data-informed decision-making during previous crises are under strain. Foundation learning and evaluation functions are shrinking. Fewer evaluation RFPs are being issued. Independent firms that conduct community-based research are closing their doors. In too many spaces, learning is viewed as nonessential—something to pause until things “settle down.”

But this perspective fundamentally misunderstands what learning does in crisis moments.

The instinct to “just act now and reflect later” feels logical when people are suffering. Yet experience shows that this approach actually slows effective responses and wastes precious resources. **Learning isn't separate from action—it's what makes action strategic, targeted, and sustainable.**

At this moment, foundations operate with the inherent tension between the urgency of rapid response and the critical need for continuous, strategic learning grounded in communities.

For true impact, it's essential to embrace a both/and approach, recognizing that while speed is vital, sustainable solutions are forged when action is deeply informed by adaptive learning and evaluation.



Leveraging both these interdependent strategies enables philanthropy to navigate complex challenges more effectively and fulfill its greater purpose.

Overly focusing on rapid response investments at the expense of learning leads to mission drift and a lack of strategic coherence over time. Setting aside learning isn't just a missed opportunity. It's a strategic mistake.

Over the past few months, Engage R+D revisited four evaluations of philanthropic crisis response efforts conducted between 2017 and 2022. These efforts spanned health equity, immigrant justice, civic engagement, and racial justice, and they revealed how learning helped philanthropy respond not only with speed, but with clarity, trust, and strategic focus. We use 'learning' to encompass both formal evaluation functions and the broader infrastructure of reflection, adaptation, and knowledge-sharing that enables responsive philanthropy. From these efforts, we identified five cross-cutting lessons. They remain highly relevant today—and underscore why philanthropy must keep learning.

Here's what philanthropy can carry forward.

LESSON 1:

RELATIONAL GROUNDWORK IS WHAT MAKES RESPONSIVENESS POSSIBLE

In moments of crisis, funders often feel pressure to act quickly. But speed alone isn't enough. It also requires strategic focus and relational philanthropy. Evaluation efforts revealed that the most effective responses to crises over the last eight years were those built on deep relational groundwork: community partnerships, coalition networks, and trusted intermediaries that had been cultivated over years, not months. When a crisis hit, these partnerships could pivot in real time to meet new challenges. Learning helped funders leverage this groundwork strategically, responding not just with stopgap measures, but with strategic support for long-term change.

The *We Count LA* campaign—a multi-funder effort—was led by the California Community Foundation and more than 100 local partners working to ensure a complete 2020 census count. When COVID-19 made in-person outreach impossible, these groups quickly shifted to phone banking, multilingual media, and digital organizing—drawing on years of groundwork. In immigrant justice and health equity spaces, similar pivots were possible where funders had already invested in coalitions, movement leaders, and community-centered intermediaries.

Rapid and emergent learning played a key role in activating those partnerships. Evaluation partners provided real-time data and helped identify where census outreach was working and where it wasn't. In some cases, they visualized response rates down to the neighborhood block. Elsewhere, learning surfaced gaps in funding or strategy, allowing funders to fine-tune support rather than fly blind.

We often think of learning as retrospective. But in times of uncertainty, it was what helped propel the work forward.

LESSON 2:

TRUST ACCELERATES STRATEGY— AND LEARNING DEEPENS IT

Across the four cases we reviewed, funders who had strong relationships with grantees and who trusted them to lead were able to respond more nimbly and equitably. They gave general operating support. They streamlined reporting. They let grantees decide how to allocate funds. But this shift wasn't just about flexibility. It reflected a broader recognition that frontline leaders were best positioned to know what was needed—and that funders needed to get out of the way. They also demonstrated an increased willingness to take risks and reflect on ways that may be undermining their equity commitments.

With The James Irvine Foundation's *Protecting Immigrant Rights* and The California Endowment's *Fight 4 All Fund*, this trust was operationalized through rapid process changes: eliminating lengthy application requirements, accepting proposals grantees had used for other funders, and moving to more multi-year grants deployed through trusted intermediaries. The California Endowment's COVID Rapid Response grants also leveraged its vast network of grantees to quickly deploy resources. Across these examples, trust enabled action—and helped ensure resources reached those most affected.

Learning helped funders deepen this trust by making space for reflection—not just on results, but on their own power and role in the ecosystem. In the COVID-19 evaluation, learning sessions helped funders identify where dominant norms were shaping risk perceptions. They elevated equity champions within foundations and surfaced how shifts were landing with grantees.

Participatory learning approaches brought voices from the field directly into decision-making.

In that time of high pressure on philanthropy, these funders could have decided to pause learning efforts, but they didn't. Instead, they prioritized learning to make sure they were responsively supporting grantees when it mattered most. It paid off. Rather than defaulting to compliance, learning became a tool for recalibration and strategy. It helped funders stay aligned with their values without losing focus or momentum.

LESSON 3:

STRATEGY NEEDS GROUNDING, NOT JUST AMBITION

Disruption doesn't just affect program delivery—it destabilizes the assumptions underlying strategy. Funders who had built long-term theories of change or multi-year plans suddenly found themselves facing new conditions, new questions, and new needs from the field.

This disruption was especially evident in efforts to support a pro-immigrant response to hostile rhetoric and exclusionary policy. Existing advocacy playbooks weren't designed for the scale and coordination of these new threats. Funders didn't default to predetermined strategies or assumptions. Instead, with the help of learning and evaluation teams, they paused to ask: What's changing in the field? What do leaders need now? What actions can we take within our sphere of influence? Their learning inquiry didn't lead to a perfect blueprint, but did yield a deeper understanding of the conditions immigrant justice organizations were navigating and how funders can go "beyond the check" to coalesce partners and unlikely allies.

Embedded learning teams helped facilitate those conversations. In some cases, they tracked adaptations across dozens of organizations. In others, they created cross-funder briefs that helped decision-makers inside foundations course-correct in real time. They learned that in times of crisis community-based organizations—be they service providers or organizers—are in fact trusted multi-purpose entities that organize, advocate, and coordinate mutual aid in powerful ways.

We sometimes talk about learning as a way to inform strategy. In times of turmoil, it is strategy.

LESSON 4:

TREAT NARRATIVE AS STRATEGY, NOT AFTERTHOUGHT

Philanthropy is increasingly comfortable funding services. Less so when it comes to funding narrative work that is fundamental for social change. Yet crises don't just create programmatic challenges, they create narrative opportunities and threats that require immediate response. Harmful narratives emerge that need pushing back. Disruption creates openings to influence public understanding in previously unanticipated ways. Our evaluations from 2017 to 2022 highlight how funders who had invested in narrative capacity over time were able to seize these moments strategically.

In immigrant justice and civic engagement spaces, this played out in real time. When anti-immigrant rhetoric intensified, funders could quickly activate existing cultural strategy networks and coordinated communications. The *We Count LA* campaign leveraged narrative strategies to mobilize hard-to-count communities for the census amid pandemic disruption. These weren't just long-term investments, they were crisis response tools.

Here, learning helped funders understand both the long-term narrative capacity building and the real-time narrative opportunities that crises presented. It helped them see when to counter harmful narratives and when to advance proactive frames. And it helped translate the value of cultural work into terms that resonated internally, even when outcomes were long-term or hard to quantify.

This kind of learning doesn't happen through logic models.

It happens through listening, through rapid feedback loops, and through learning spaces where grantees and funders adapt together in real time.

Philanthropy often underinvests here precisely because outcomes are long-term and less quantifiable, but crises have shown why narrative must be treated as core strategy.

LESSON 5: NAVIGATING CRISIS REQUIRES RADICAL COLLABORATION

One of the defining features of the philanthropic response to crises over the last eight years has been the level of collaboration. Funders pooled resources, shared risk, and aligned strategies across issue areas. In the *Fight Fund and Protecting Immigrant Rights*, existing relationships and shared learning structures enabled rapid response and coordination. In the *We Count LA* campaign, dozens of funders and hundreds of organizations moved in concert toward a shared goal. Those relationships and networks became a lifeline during COVID and have been a critical part of the civic engagement infrastructure and coalitions that exist today. In fact, many of the new funding and coordination arrangements established during that period are still in play today and more important than ever.

**Learning didn't just document these efforts.
It helped strengthen and fortify them.**

Cross-funder learning spaces enabled shared sensemaking—reducing duplication, surfacing tensions, and building alignment. Evaluation partners synthesized feedback across roles and made patterns visible. Rather than top-down assessments, these learning efforts took place in participatory spaces where funders and field leaders reflected together in real time and helped philanthropy move with coherence. There was growing recognition that funders don't need to control all the grantmaking and are more impactful when they work together.

**In 2025, that kind of coordination will be
just as essential—but increasingly fragile—
if learning infrastructure continues to erode.**



Today, effective philanthropy relies on foundations continuing to invest in deep learning and evaluation.

What's at stake if foundations don't invest in learning now?

The foreseeable future is marked by polarization, misinformation, government scrutiny, economic volatility, climate disruption, and dismantling of equity efforts. Yet this time, philanthropy risks entering the storm without the learning infrastructure needed to navigate, and to imagine, better futures. **This is a mistake—not just morally, but strategically.**

In environments where facts may not be shared and trust is low, dispensing with learning infrastructure means losing the capacity to connect to the field, test and adapt strategy quickly, and foster the radical collaboration needed to recover and build the adaptive capacity for greater impact in the long-term. It means weakening the ability to understand the nuanced realities on the ground, elevate community wisdom, build networks, and support crucial but often invisible work like narrative change or resistance strategies. Without deep learning, philanthropy risks drifting from its fundamental orientation, reverting to unhelpful forms of “heroic” philanthropy without stakeholder participation, and diminishing its ability to maintain hard fought gains from decades of investments.

What It Looks Like to Invest in Learning Now

To achieve lasting impact, philanthropy must intentionally embrace the tensions between rapid crisis response and learning infrastructure by investing in both. Over focusing on one at the expense of the other leads to unsustainable outcomes. Instead, strategic action and continuous reflection must be intertwined to ensure agility and deep connection to community wisdom. By valuing learning as an essential strategic capacity, foundations can transform reactions into truly transformative and enduring responses.



What does preserving this infrastructure look like for foundation leaders and boards?

It means protecting learning and evaluation roles even during budget cuts. It means commissioning participatory learning and evaluation that lifts up community perspectives on what's happening and what's needed in both the short and long-term. It means creating cross-funder learning spaces that build shared understanding. And it means treating learning not as overhead, but as the strategic capacity that makes everything else work.

Learning cannot simply be switched back on at a later time. De-prioritizing learning means dismantling infrastructure that has taken years to build. Foundation learning and evaluation staff work intentionally to establish trusting relationships and shared values with executives, trustees, program staff, and grantees. They develop integrated practices to ask important questions, share applicable insights, and collaboratively support adaptive decision-making. Strengthening and caring for this learning infrastructure over time is what allows funders to learn quickly and respond strategically when needed.

Learning is how philanthropy stays connected to the field. It's how strategy gets tested and adapted. It's how collaboration takes root. And it's how funders move from reaction to reflection to response.

If philanthropy loses its learning infrastructure, it doesn't just lose insight. It loses its orientation.

This article draws from a companion learning brief by Engage R+D, available here: engagerd.com/feature/learning-in-turmoil.

Clare Nolan is the Co-Executive Director of Engage R+D

Sonia Taddy-Sandino is the Co-Executive Director of Engage R+D

Dr. Hanh Cao Yu is the Executive Director for the Center for Evaluation Innovation

Dr. Kim Ammann Howard is the Director of Impact Assessment and Learning at The James Irvine Foundation

Marion Standish is the former Senior Vice President of The California Endowment

Charles Fields is the Executive Vice President of Programs at The James Irvine Foundation

If you would like to learn more:

Sonia Taddy-Sandino
Co-Executive Director,
Engage R+D
staddy@engagerd.com

Dr. Hanh Cao Yu
Executive Director,
Center for Evaluation
Innovation
[hanh@
evaluationinnovation.org](mailto:hanh@evaluationinnovation.org)



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