

**EVALUATION**  
ROUNDTABLE

**Navigating Accountability  
for Systemic Impact**

**Tuesday, October 14, 2025**

CENTER FOR  
**EVALUATION**  
INNOVATION

# Ancestral and Land Acknowledgment

Every community owes its existence and vitality to generations from around the world who contributed their hopes, dreams, and energy to making the history that led to this moment.

Some were brought here against their will, some were drawn to leave their distant homes in hope of a better life, and some have lived on this land for more generations than can be counted. Truth and acknowledgment are critical to building mutual respect and connection across all barriers of heritage and difference.

We begin today by acknowledging what has been buried by honoring the truth. We are standing on the ancestral lands of the **Lanape** People. We pay respects to their elders, past and present. Please take a moment to consider the many legacies of violence, displacement, migration, and settlement that bring us together here today.

And please join us in uncovering such truths at any and all public events.

- Honor Native Land Guide, U.S. Dept of Art & Culture

# Thank you to our funders & sponsors.



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# Meet our team.

& Blue!



**Dr. Hanh Cao Yu**

Executive Director



**Dr. Annjanette Rosga**

Deputy Director



**Dr. Albertina Lopez**

Director



**Mariah Brothe Gantz**

Senior Associate



**Kayla Christopherson**

Senior Associate



**Sam Bouchat**

Administrative & Project  
Associate



**Stephanie O. Darby**

Senior Operations Manager



**Sharon De Castro**

Controller

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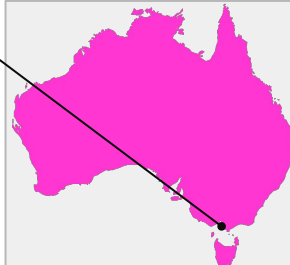
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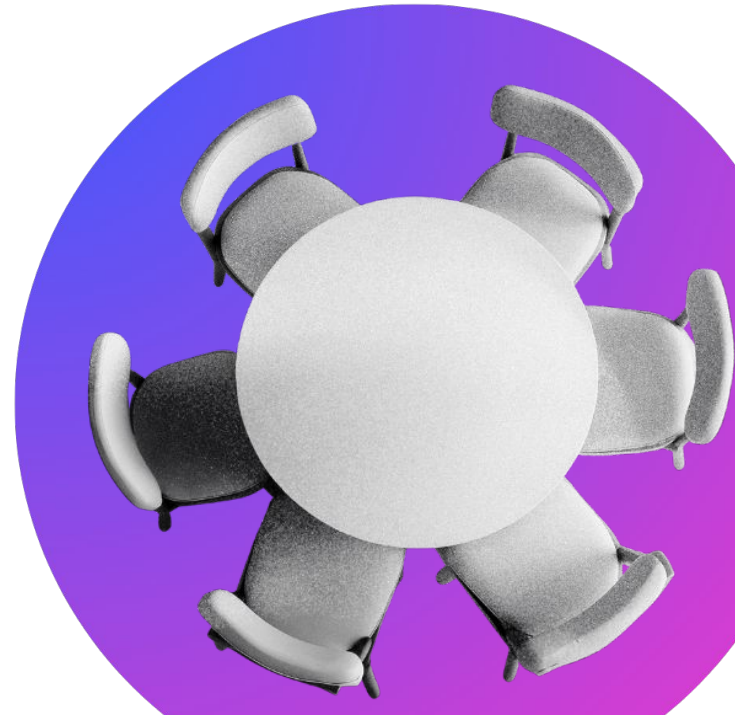
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- Annie E. Casey Foundation
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- North Carolina**
- Duke Endowment

# We have a few ground rules.

- Engage fully throughout the convening
- Listen & learn from each other, growth happens from difference
- Stay focused and *on time*
- Confidentiality—what is said in the room, stays in the room
- No texting, no phones

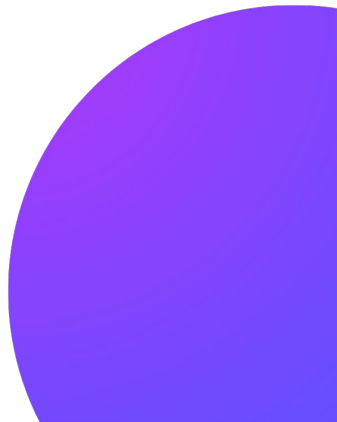




# **Welcome, Bess Rothenberg**

Deputy Vice President,  
Strategy & Impact

Ford Foundation



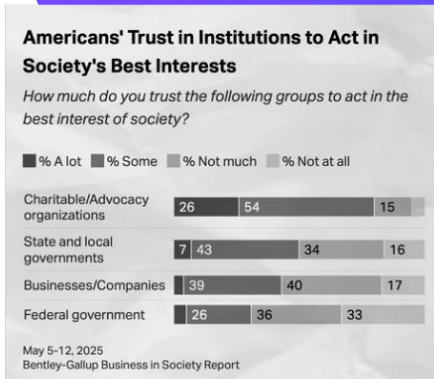
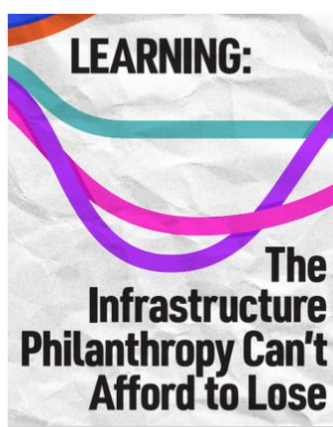
# Why This Theme Now?

Accountability for Systemic Impact

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Hanh Cao Yu

# Since we last met in 2023...



# Why This Case?

The Significance of The Ford Teaching Case

# Introduction to the Theme

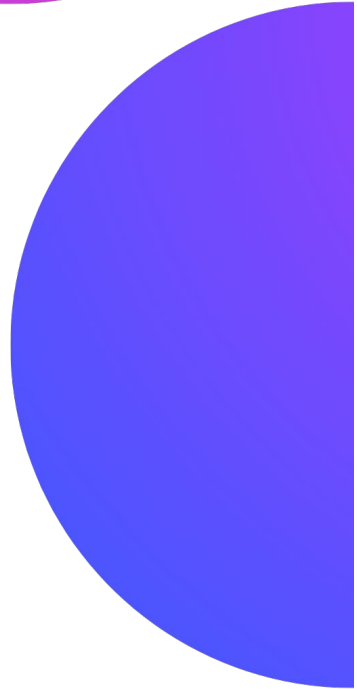
## Accountability for Systemic Impact

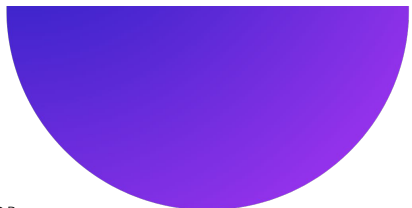
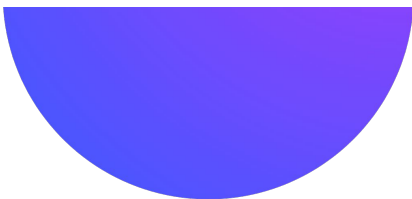
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Albertina Lopez

# The **Evaluation Roundtable** has always been about advancing the sector's strategic learning and evaluation work.

- Founded by Patti Patrizi in 1989
- Gifted to CEI in 2012
- **What I love about the Roundtable:**
  - We are serious about our theme.
  - We are not going to give you 5 things to bring back to your work.





## **Learning & evaluation are essential for understanding and being accountable for impact in complex systems.**

- All of us in this room aim to make a positive impact, and we do our best to steward resources effectively.
- But systems change work is complex.
- Our current political climate makes understanding how to navigate systems even more critical.
- And we have decades of experience and insight in this room.

# We have two core **framing questions** for our time together over the next few days.

1. What will it take for philanthropy to **evaluate, measure, report on, and learn about systemic impact** in ways that reflect the realities of complex systems change—diverse contexts, incremental progress, and long time horizons—**while still offering meaningful insight and guidance?**
2. How can those approaches **also hold foundations accountable** for how their resources, decisions, and efforts **influence systems and contribute to or unintentionally work against social and environmental betterment?**

# We are exploring the intersection of accountability, impact, and systems change in philanthropy.

## Throughout our Time Together

- We'll move between reflecting on the sector as a whole and on your own foundation's work
- Our conversations will build toward identifying *shifts* we want to see

## Each Day's Focus

**Day 1:** Looking Back & Exploring Programmatic Mental Models & Systems Change Challenges

**Day 2:** Learning in Practice with the Ford Foundation & Your Experiences

**Day 3:** Looking Forward & Defining Shifts we Want to Make

# Table introductions.

- Name & pronouns
- Role & organization
- What comes to mind when you hear the words “accountability” and “impact”



# History

## Roots of Accountability for Systemic Impact

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Hanh Cao Yu & Mariah Brothe Gantz

# Questions for exploration.

What does history reveal about the **evolution of philanthropic approaches** to accountability?

What **assumptions** have been made about accountability relationships?

When, why and how did “**impact**” become a key part of the dialogue and the evolution of our thinking?

# 1900 - 1950: Charitable Philanthropy

## The Era: Individual Donor Giving

Wealthy, white elites gave to their passion projects. High taxes yielded the dawn of organized/institutional philanthropy with large endowments.

### Accountability & impact

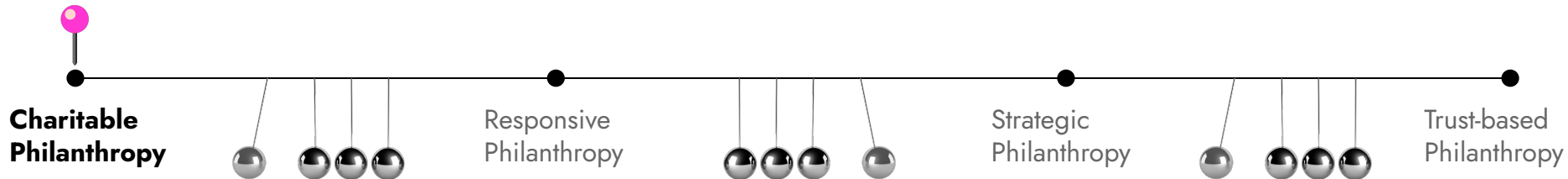
No accountability mechanisms.  
Giving flowed through personal networks and relationships

Donors showed interest in academia's use of the scientific method to study outcomes

### Critique

Donors gave without thought to "context or population," marginalized groups, long-term vision, nor strategy

Nonprofits received funds in small increments, without reporting or spending standards



# 1960 - 1980: Responsive Philanthropy

## The Era: Responsive to Needs, Greater Government Role

Foundation giving comes under scrutiny because of the lack of regulation. The NCRP was created and called for more giving based on racial analysis and social justice. New laws created more accountability of philanthropy.

### Accountability & impact

Congress concerned with philanthropy's influence / Tax Act of 1969: Minimum Payout Requirement

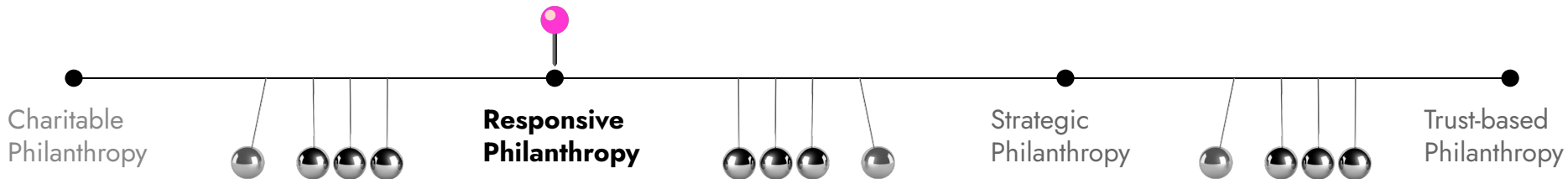
More scrutiny of foundations meant more scrutiny of nonprofits.

Philanthropy is influenced by RCT.

### Critique

Responsive philanthropy lacked clear accountability mechanisms for all.

Social reformers concerned with applying the scientific method to social problems.



# 1990 - early 2000s: Strategic Philanthropy

## The Era: Funder-driven Impact

Reacting to lacking cohesive strategy, philanthropy starts to intentionally focus investment on desired outcomes and impact. Prevalence of logic modeling promoted more linear cause/effect thinking. There is a desire for aggregated, quantifiable metrics and measurable outcomes to prove impact.

## Accountability & Impact

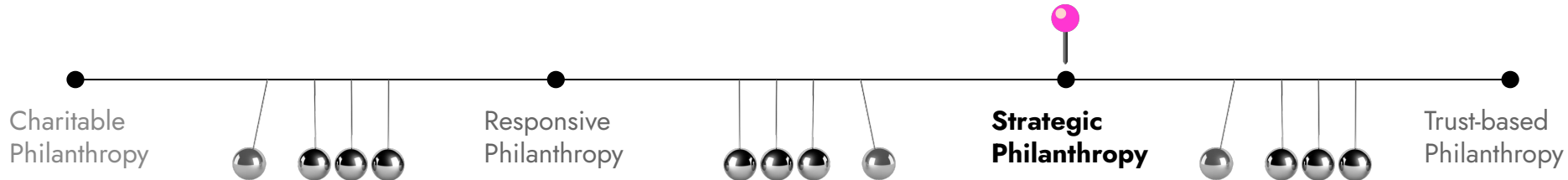
Foundations set the agendas, determined the outcomes and measures of success, and then held grantees to account for that success.

Foundations wanted to see the “social return” on their investment.

## Critique

Grantee and community perspective was largely absent.

Overconfidence with regards to solutions to complexity of social problems.



# 2000 - Present: Trust-Based Philanthropy

## The Era: Focus on Relationship, Trust & Power Sharing

In response to limited community voice, trust-based philanthropy gains traction. Renewed focus on equity, responsiveness, and community participatory decision-making.

### Accountability & impact

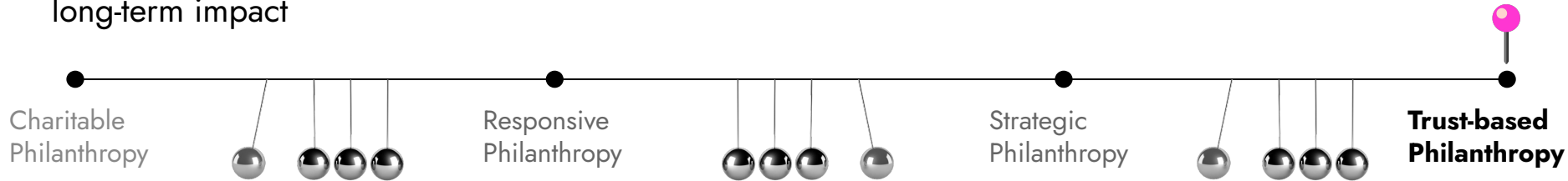
Some foundations explicitly address accountability to community.

Funders show interest in sharing power for relational and collective accountability

Funders & evaluators explicitly name complexity and focus on learning for accountability, decision-making, and long-term impact

### Critique

Trust-based philanthropy is not currently mainstream because the programmatic mental model still holds important value for many



# Enduring elements of a programmatic mental model.

- Work is organized around **programs with defined outcomes**
- Change can be **planned and managed**
- “Impact” is considered **measurable and attributable to results**
- Evaluation used to **prove and improve** performance
- **Accountability flows upward** to funders and boards
- **Control, clarity, and evidence of success** are valued

# Independent reflection.



What should be **added** to the programmatic mental model elements?

How does a programmatic mental model **show up in your foundation?** (e.g., developing strategy, articulating impact goals, navigating accountability relationships, engaging in learning and evaluation, etc.)

When **does** this programmatic mental model work? Why?

When **doesn't** it work? Why not?

# Speed networking with a partner

## Discuss:

When does this programmatic mental model work? Why?

When doesn't it work? Why not?

What common themes are emerging from our experiences about when this model fits and when it falls short?

## A programmatic mental model

- Work is organized around **programs with defined outcomes**
- Change can be **planned and managed**
- “Impact” is considered **measurable and attributable to results**
- Evaluation used to **prove and improve** performance
- **Accountability flows upward** to funders and boards
- **Control, clarity, and evidence of success** are valued

# BREAK.

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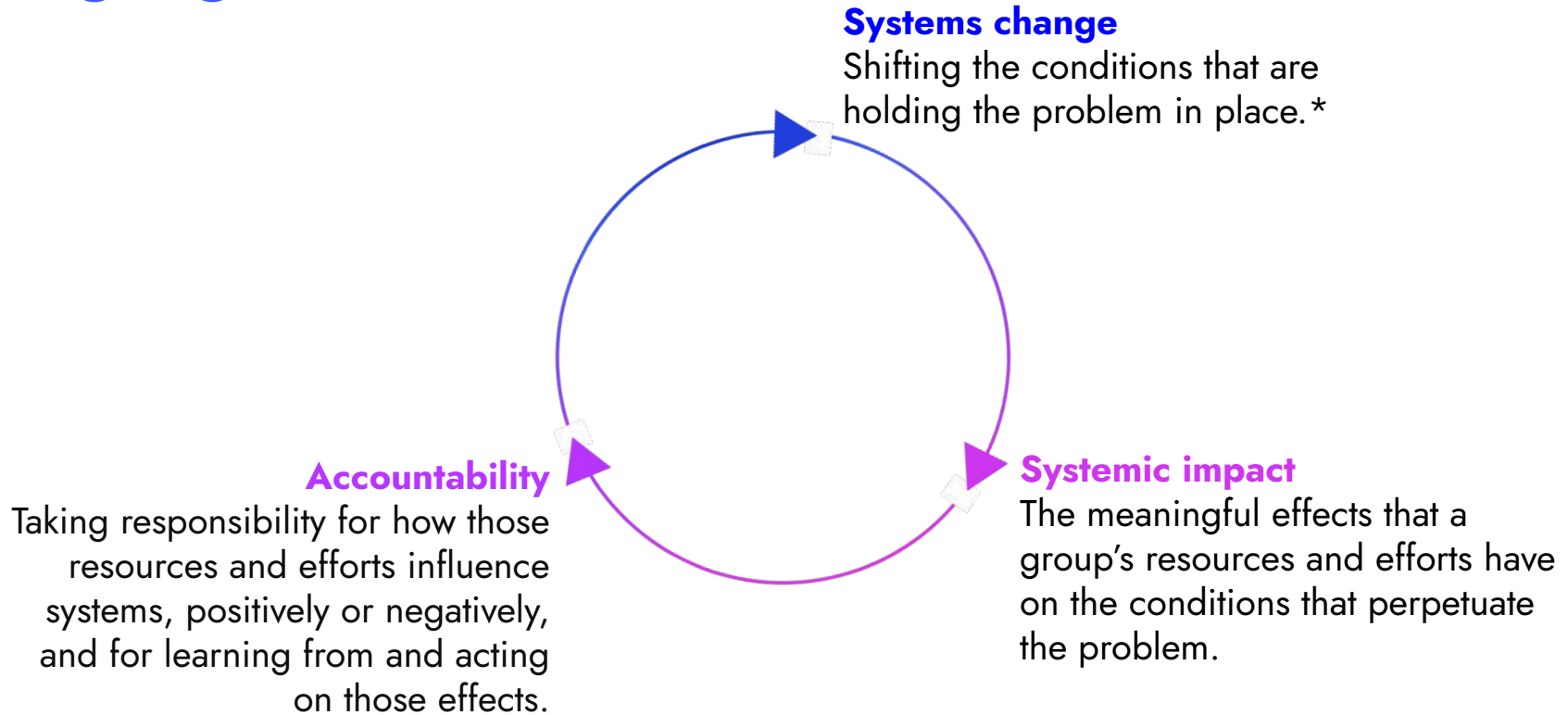
15 minutes

# Challenges & Tensions in Navigating Systemic Impact

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Albertina Lopez & Kayla Christopherson

# Let's ground in some (working) **shared language** .



\*Social Innovation Group, as cited in FSG's Water of Systems Change

# Our **benchmarking research** revealed **six challenges foundations face when learning to assess & take responsibility for systemic impact.**

## The research approach

- Desk research
- 5 field expert interviews
- 65 foundation interviews with 90 Learning & Evaluation and Program staff

## The 6 challenges

- This is one set, not a comprehensive list
- We are learning alongside you
- This is a space for reflection & dialogue, to spark creativity & innovation

# **Framing & Goals** refer to how we define and discuss impact.

## **A programmatic mental model & practice can:**

- Frame impact as long-term, large-scale, population-level aspirations
- Rely on fixed theories of change that outline a direct path for how the program will achieve them

## **Programmatic challenges in systems change work can:**

- Assume direct control over change, isolating foundation efforts from system dynamics
- Risk overlooking structural inequities, which may unintentionally reinforce them
- Create unrealistic expectations about success, distorting our judgments and causing disengagement

**Framing impacts as broad aspirations without grounding them in system dynamics risks misinterpreting foundation contributions and limits learning about systemic impacts.**

# **Causality & Evidence** refer to how we think impact happens and what counts as credible data & information.

## **A programmatic mental model & practice can:**

- Assume linear, predictable cause-and-effect relationships
- Seek evidence of direct program attribution to impacts, often through experimental and quasi-experimental designs
- Pre-determine quantitative measures to guide data collection to recognize patterns

## **Programmatic challenges in systems change work can:**

- Create misleading causal claims, overstating or misinterpreting findings
- Limit understanding of how our work interacts with others'
- Encourage confirmation bias through selective data collection

**Assuming linear causality and narrowly studying how we think change happens limits our ability to really understand and account for our contribution to systemic impact.**

# **Synthesis & Reporting** refer to how we make sense of and tell the story of impact.

## **A programmatic mental model & practice can:**

- Standardize indicators and reporting to see patterns
- Aggregate data across grants to track progress against goals
- Prioritize diverse communication needs, such as with dashboards

## **Programmatic challenges in systems change work can:**

- Flatten nuance across context, obscuring complexity
- Limit understanding of variation, missing why and how strategies and outcomes vary across contexts
- Sacrifice depth for simplicity, overlooking critical context-specific insights

**Synthesis and reporting choices shape what impact we see and learn about, and they risk flattening the complexity of systemic impact.**

# **Time & Trajectories** refer to the increments and pathways by which systemic change happens.

A programmatic mental model & practice can:

- Emphasize tangible, measurable progress and clearly defined milestones.
- Align with grant cycles that support planning, implementation, and assessment within 1-4 years.
- Structure strategies and evaluations around observable, linear stages of change and improvement over time.

Programmatic challenges in systems change work can:

- Limit our ability to test and understand whether we're moving toward long-term systems change
- Miss seeing change that isn't linear or positive
- Hinder the flexible and emergent learning necessary to understanding complex, dynamic systems

**Pressure to deliver near-term evidence and meet short grantmaking cycles prioritizes near-term wins over longer-term systems change.**

# Levels & Scale refer to how we consider impact across contexts and interconnections.

A programmatic mental model & practice can:

- Support the process of piloting, refining, and replicating programs across contexts
- Enable aggregation of outcomes to illustrate broader patterns of impact across a portfolio or foundation
- Resource learning and evaluation systems designed to track progress toward predefined goals and provide clear accountability at multiple levels

Programmatic challenges in systems change work can:

- Neglect to see systems as uniquely complex—what works in one may not work in another
- Limit nuanced and collaborative systems sensing and strategy improvement
- Risk missing unintended consequences by prioritizing high-level conclusions

**Understanding systemic impact across multiple, nuanced levels creates tension when trying to draw generalizable, foundation-level, or even portfolio-level conclusions.**

# **Power & Relationships** refer to **connection building and decision-making for systemic impact.**

A programmatic mental model & practice can:

- Establish clear accountability structures upward to ensure alignment with strategic goals.
- Clarify staff responsibilities for showing how grantmaking activities contribute to intended results
- Enable leadership-driven learning priorities and evaluation practices
- Focus learning efforts on capturing nearer-term progress and results

Programmatic challenges in systems change work can:

- Ignore the participatory, collaborative perspective needed to understand systemic impact
- Prioritize short-term success, which isn't sufficient accountability for systemic impact
- See mistakes as failures, rather than key learning moments
- Fail to see systems change outcomes as cumulative, emergent, and networked, requiring more horizontal and participatory learning and evaluation practices.

**Reinforcing upward accountability limits adaptive learning, burdens grantees, and sidelines accountability to communities.**



# **Independent reflection.**

How do these challenges show up in  
your foundation?

What might you or have you tried to  
address them?

# Table conversations.

Looking across the challenges your foundation experiences, what is most pressing for your work and the foundation's work?

What are you finding that successfully addresses them or what are some hypotheses about how to do so?

(Use the white boards at your table to jot down "aha" moments you want to share with the larger group.)

# Group debrief.

- What's most pressing in your foundation's work here?
- What does it get in the way of?
- What are some hypotheses about how to move through this?

# Which icon best exhibits how you feel about accountability for systemic impact after the day's activities, and why?

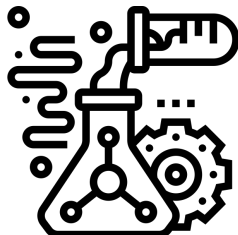
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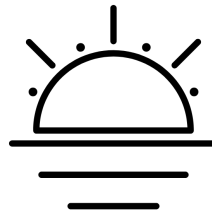
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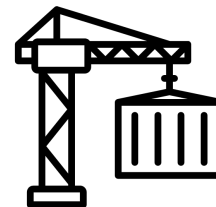
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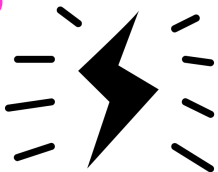
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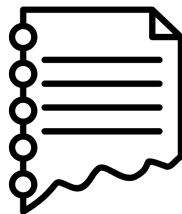
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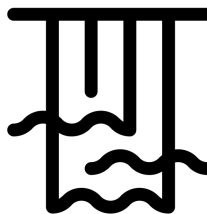
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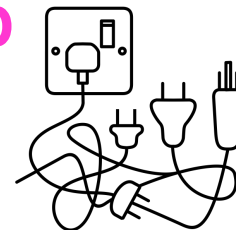
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10



# EVALUATION ROUNDTABLE

# End of Day 1.

**EVALUATION**  
ROUNDTABLE

**Navigating Accountability  
for Systemic Impact**

**Wednesday, October 15, 2025**

CENTER FOR  
**EVALUATION**  
INNOVATION

**What is one “a-ha”  
moment or question you  
are sitting with from  
yesterday?**

**What do you want to  
bring to or conversation  
today?**



# We are exploring the **intersection of accountability, impact, and systems change** in philanthropy, clarifying where we've been, where we are now, and how to move forward together.

## Throughout our Time Together

- We'll move between reflecting on the sector as a whole and on your own foundation's work
- Our conversations will build toward identifying shifts we want to see — both within our individual organizations and across the field

## Each Day's Focus

**Day 1:** Looking Back & Exploring Programmatic Mental Models & Systems Change Challenges

**Day 2:** Learning in Practice with the Ford Foundation & Your Experiences

**Day 3:** Looking Forward & Defining Shifts we Want to Make

# Why a teaching case?

## Building strategic capacity



### **Situational Awareness**

Develop sensitivity to organizational dynamics, competing incentives, and differing mental models.



### **Anticipating Tradeoffs**

Improve ability to anticipate potential consequences when making tough choices where there is no one "right" answer.



### **System Sensing**

Use the case as a focused "window into a complex organization" to explore systemic dilemmas and dynamics.

# How to Participate: Active Inquiry

## Focus on the Story

Keep discussion rooted in case specifics, constantly referring back to the text.

## Embrace Speculation

Hypothesize and guess "why" things happened or "what was probably going on" even if not explicitly stated in the text.

## Compassionate Curiosity

Approach the case with curiosity and compassion, acknowledge that the story is inevitably incomplete.

# Teaching Case: Part 1

Definitions & assumptions about impact

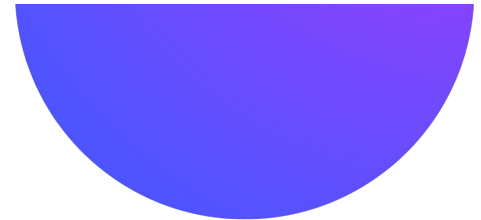
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Hanh Cao Yu


# Underlying systemic drivers of inequality.

- Cultural narratives that undermine fairness, tolerance and inclusion
- Unequal access to government decision-making and resources
- Persistent prejudice and discrimination against women, as well as racial, ethnic, and caste minorities
- Rules of the economy that magnify unequal opportunity and outcomes
- Failure to invest in and protect vital public goods, such as education and natural resources

[starting p. 2, Line 28]



# What is Walker's theory about how to increase the foundation's impact?



*“Walker called on the foundation to pursue a more integrated approach for greater impact, noting that the work “has become too fragmented and diffuse— the whole is not greater than the sum of its parts.” To effectively address the drivers of inequality, grantmaking programs would need to be restructured and realigned. ”*

[p. 3, Lines 4-7]

“Walker advocated for centering grantee perspectives and casting philanthropy in a supporting role, not as the protagonist in social change. While remaining focused on outcomes, he said the foundation should not be prescriptive about how grantees pursued those outcomes.”

[p 3, Lines 20-23]

## Tensions around impact definition: Debates about hierarchy of outcomes

“The NRCC strategy lacked indicators, and staff tended to focus on outcomes like ‘effective agency,’ **often seen as an end in itself** rather than demonstrating how it ‘led to other outcomes.’”

- Tony Bebbington  
International Program Director  
[Page 15, Line 15-20]





# Key Takeaway #1

Because we recognize the complexity and unpredictability of systems, we have trouble articulating impact expectations at a productive pitch, or level of zoom.

# How does Ford's team try to manage these dilemmas around defining impact?

“Our commitment to impact means that you need to continue learning. If you're going to have systemic... impact, it means you're taking risks... **It's not a problem that we fail. It's a problem if we don't learn.**”

- Martín Abregú  
International Vice President  
[p. 10, line 19-20]





# Key Takeaway #2

If we think about impact only as the outcomes on that farthest right side of the theory of change—the ultimate end state we want to see in the system—we lose the other powerful definition of impact.

# Small group conversations.

1. What is the dominant frame or **mental model** around **“foundation impact”** in your foundation? And what **challenges** does that create in your work (as a program strategist or learning & evaluation lead)?
2. What **approaches have you tried** to help your foundation manage tensions around impact in systems change work productively?

# Break.

15 minutes

# Teaching Case: Part 2

Evaluating NRCC

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Albertina Lopez

# Individual reflection & table conversations

1. In the NRCC evaluation, Ford and Dala encountered challenges in their systems change strategy related to indicators, thinking about causality, determining whose voices to include, and making sense of disparate data. **What core challenges does your foundation face in measuring, synthesizing, and evaluating the effects its resources and efforts have on system conditions?**
2. **What approaches is your foundation using to better understand the effects its resources and efforts have on system conditions that are perpetuating the problem? What's working well or poorly? Why?**

# Lunch.

12:20 - 1:20p

# Teaching Case: Part 3

## Enactment of Accountability

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Hanh Cao Yu

# The tensions of internal with outward & collective accountability.

“I think **people think of their primary relation as being to these movements, and not to the resources that we are entrusted with.** That has real implications for how much, or in what way, one thinks about impact or accountability.”

- Tony Bebbington  
International Program Director  
[p. 37, Lines 10-12]

“We support work that is being done by the field, and **we have to fit the work that others do** into the foundation’s structures and frames.”

- Erika Yamada  
Program Officer, Brazil  
[p 37, Lines 14-15]



# The tensions of internal with outward & collective accountability.

“The whole idea is that the drivers of inequality are global. Going back to the question of impact — **you’re not going to disrupt global systems with a bunch of globalists.** You need to bring **new voices and perspectives into these conversations.**” **Insights from the local level help generate a different conversation** and ensure that global-level changes can eventually have an impact beyond Ford’s specific regions.

- Martín Abregú  
International Vice President  
[p. 33, Line 11-15]



# Accountability to strategic learning.

"I think of it as a **moral duty** to question our assumptions about how change happens."

- Bess Rothenberg  
Deputy Vice President  
[p.37, line 3]



# Accountability to strategic learning.

“We need to recognize **what is required in the larger country context** for others to feel in solidarity with those communities....” To what extent can we achieve our goals if we don’t have states with the **capability to protect and regulate** natural resources in the way we envision? “....The evaluation gave some clarity that we have work to do in both areas.”

- Martín Abregú  
Vice President  
[p. 29, 15-17, 21-25]





# Key Takeaways

1. Genuine **shift in power** requires a **fundamental re-imagining of internal accountability** and disciplines learning.
2. Creating intentional, **mutual accountability loops** that **invite grantees and communities** into shared **meaning-making**, contesting the foundation's assumptions, and exploring **strategic choices** to **shift power and** foster **collective responsibility** for desired impacts.
3. **Build more collective or mutual accountability** loops that transcend a single organization, recognizing that foundations are just one actor in a larger system and must collaborate.



# Small Group 3

## *Enactment of Accountability & Power Relationships*

1. How does your foundation define your **internal accountability stewardship**? How do you try to address, navigate or resolve **power dynamics and tensions between inward and outward accountability**?
2. What **kinds of learning and evaluation questions** should we be asking to help us learn more about interactions between our work and others' work in the system (including opposing forces)?

# Break.

15 minutes

# Reactions to the teaching case.



**Bess Rothenberg**

Deputy Vice President,  
Strategy & Impact  
Ford Foundation



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our panelists

# EVALUATION ROUNDTABLE

## End of Day 2.

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**EVALUATION**  
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**EVALUATION**  
ROUNDTABLE

**Navigating Accountability  
for Systemic Impact**

**Thursday, October 16, 2025**

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# We're exploring the intersection of accountability, impact, and systems change in philanthropy, clarifying where we've been, where we are now, and how to move forward together.

## Today

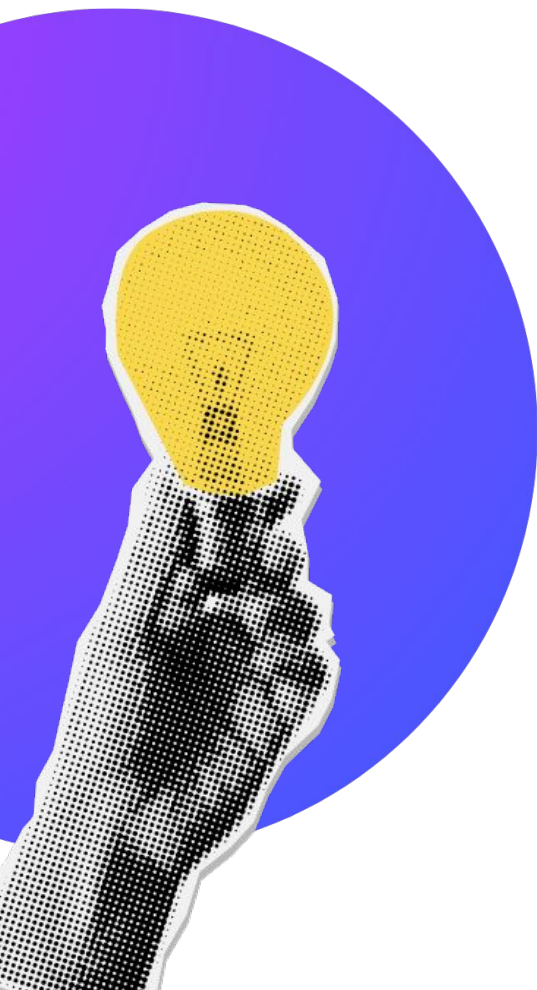
- We've been moving between reflecting on the sector, the Ford case & your own foundation's work
- Our conversations has been building toward identifying shifts we want to see — both within our individual organizations and across the field

## Each Day's Focus

**Day 1:** Looking Back & Exploring Programmatic Mental Models & Systems Change Challenges

**Day 2:** Learning in Practice with the Ford Foundation & Your Experiences

**Day 3:** Looking Forward & Defining Shifts we Want to Make



**If you were to imagine the sector in 10 years, what ideal practices and approaches would be in place for holding foundations accountable for the effects their resources and efforts have on systems?**



# Exploring Future Directions for Evaluating Systemic Impact

Remarks & Fireside Chat with Jewlya Lynn

Founder, PolicySolve  
Initiative Co-Director, Causal Pathways

Moderated by Hanh Cao Yu

# Exploring Future Directions for Evaluating Systemic Impact

What we/our grantees are doing

Process outcomes (capacity, collaboration)

**The black box of systems change**

Systemic change impact (often seen as population level change)



# Exploring Future Directions for Evaluating Systemic Impact

What we/our grantees are doing

Process outcomes (capacity, collaboration)

**The black box of systems change**

Systemic change impact (often seen as population level change)

- Aligned practice changes in a half dozen public mental health centers to ensure they can serve deaf and hard of hearing clients
- Adoption of differential response protocols in child welfare to allow for early intervention
- Adoption of legislation that leads to the exit of private insurers as active antagonists to efforts to expand access to mental health care in the justice system
- Statewide policy adopted based on advocacy from rural communities to increase housing options for homeless youth
- Redesign of multiple hospitals to shift from emergency/in-patient care orientation to a combined model with robust community-care models
- Creation of “director of research” roles in Kenyan universities that had historically focused primarily on teaching
- Creating an international data repository that can harmonize different types of ocean and ocean/community impact data to enable cross-cutting research
- Federal, state & university level policies and practices to begin tracking how many higher ed students are also parents
- Adoption in Rio de Janeiro of a curricula that integrates a racial equity framework

# Future of the Sector

## Propositions for Practice

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Mariah Brothe Gantz  
Kayla Christopherson  
Anjie Rosga  
Albertina Lopez



# Discussion Activity

## Think

First, we'll offer you some reflection questions to think about and make some response notes to yourself.

## Pair

Next, you'll pair up or join a group of three to do two things:

- Discuss your reflections
- Develop some ideas to bring to the large group.

## Share

Finally, we'll reconvene and have a facilitated conversation about the ideas you developed in your small groups.

# Think.

**What have you done—or what are trying to do—to help your foundation reflect on its accountability for the ways its work affects broader systems conditions and dynamics?**

- What hasn't worked? What got in the way?
- What has worked? What made that possible?
- What might you try next?
- What would be the first step? What's most doable?

# Pair.



**What do you think you'll try next?**

10 minutes



**Where are there similarities or alignment?**

5 minutes



**Co-create a draft proposition**

10 minutes

# Example.

**Moving from** designing strategies around isolated programs.



**Because** it can produce misleading, causal claims about how we got to impacts.

**Moving to** creating strategies that are situated in the systems we work in.

**Because** it can help us see how other work might interact with ours, opening our perspective of alternative causal pathways.

# Pair.



**What do you think you'll try next?**

10 minutes



**Where are there similarities or alignment?**

5 minutes



**Co-create a draft proposition**

10 minutes

# Share your propositions.

Where do you see  
similarities, alignments,  
and patterns among  
these?



# Learning and adapting are vital mechanisms for holding ourselves accountable for systemic impact.

What will it take for our **strategic learning cycles** to better reflect the realities of systems change, capture unintended systemic impacts, and invite more accountability for learning about how systems change?

We developed a set of **working propositions** to help us reflect on and experiment with shifts we might make.

# How might we **plan** in ways that foster a shared understanding of how systems change and how we can achieve desired systemic impacts?

## Moving From

Framing impact as a long-term, large-scale, population-level aspiration that separates the foundation's strategy from system dynamics because this creates unrealistic expectations about what we can achieve and prevents us from considering how our work interacts with others' work.



## Foundation Spotlight

Omidyar  
Network  
develops  
Impact  
Frameworks

## Moving Toward

Framing aspirations as north stars and (systemic) impact as the meaningful effects that the foundation's resources and efforts have on system conditions, because this allows us to see our role as one part of a larger web of influence and fosters collaborations and learning about contribution to greater systemic shifts.

# How might we **implement** that plan and observe how it unfolds to allow space for emergence and complexity?

## Moving From

Gathering data mainly to track progress against pre-defined outcomes and impacts because it can reinforce confirmation bias and misses unanticipated and countervailing effects.



### **Foundation Spotlight**

Humanity  
United uses  
Outcome  
Harvesting.

## Moving Toward

Drawing on diverse observations to understand how strategies interact with their contexts and what emerges, because this helps us notice feedback loops, unintended consequences, and new opportunities for leverage.

# How might we **analyze** and **synthesize** findings in ways that help us maintain nuance and complexity and produce actionable insights?

## Moving From

Overly aggregating results across grants to tell an isolated story of the foundation's 'impact' because this can flatten contextual nuance and hide variation in how systemic impact happens across contexts and levels.



### **Foundation Spotlight**

Hartford Foundation  
for Public Giving  
synthesizes  
grantee-defined  
evidence.

## Moving Toward

Co-synthesizing patterns and insights across contexts while preserving nuance because this reveals where and how progress emerges and supports more accurate and nuanced stories of contribution.

# How might we **act** in ways that help us adapt to changing system conditions?

## Moving From

Using findings primarily for scaling and replicating programs, because this can reinforce assumptions that strategies can be uniformly applied.



### Foundation Spotlight

Ford Foundation uses an 80 - 20 rule for grantmaking.

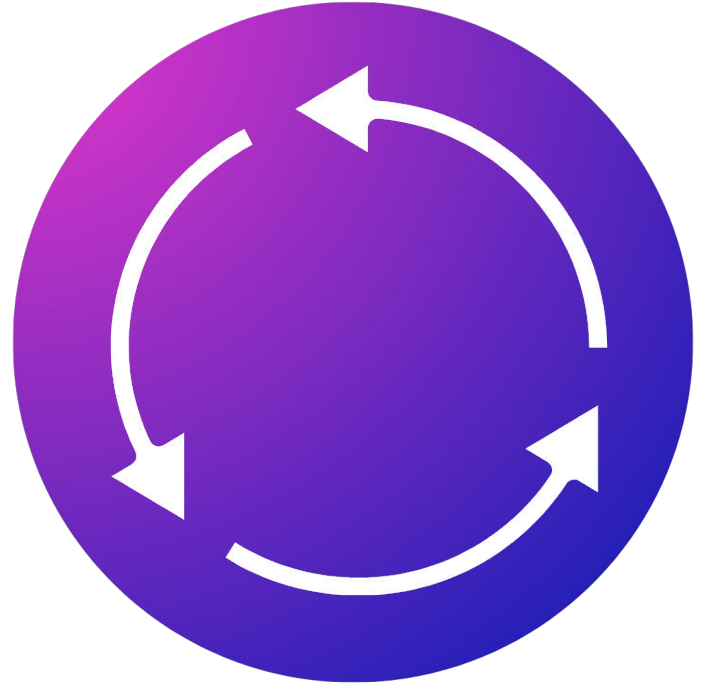
## Moving Toward

Using findings to inform strategic choices that adapt to changing systems because this supports agile learning and improves alignment with system realities.

**Now is the time to continue testing our ideas, stretching our assumptions, and learning boldly— **together** .**

**Moving forward, let's:**

- Make space to experiment and learn together
- Play with new ways of seeing and working
- Approach this work with curiosity and imagination



# CEI's engagement of the field

## Experiment with propositions through learning together:

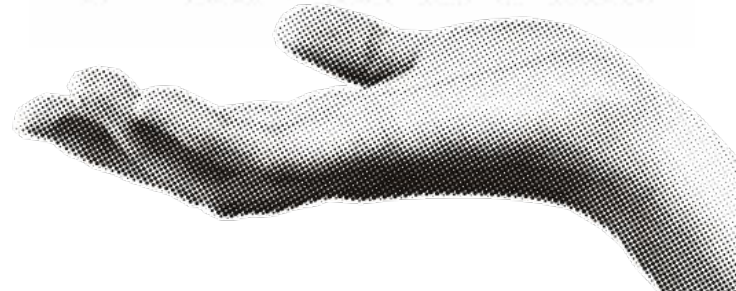
- Regional & topical convenings
- 2026 teaching case & engagement of CEOs & Trustees, program, foundation teams
- Communities of practice & learning networks

# CEI's partnership in field building

Exploring how philanthropy can  
evaluate & learn in crisis

- Future of Equity Centered Philanthropy
- Evaluators in Solidarity

Invitation to take a pulse survey



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**End of Day 3.**