



informing
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**Evaluating Social Change
Meeting Summary**

Prepared for
Marguerite Casey Foundation

June 2004

Evaluating Social Change Meeting Summary

Prepared for

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The mission of BTW Consultants is to inform change in the nonprofit and philanthropic sectors. We have been working with our clients, both locally and nationally, for over five years to increase organizational effectiveness and learning by providing the following services: planning, evaluation, client tracking and information system development, and applied research. Our work is guided by our three core values: integrity, intelligence, and compassion.

June 2004

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CONTEXT

On May 17, 2004, the Marguerite Casey Foundation (MCF) sponsored a one-day conversation among foundation staff to learn from each other about approaches to evaluating social change investments. The invitation list included individuals known to have experience making social change grants, some of whom had explicitly expressed interest in this topic (the list of attendees can be found in Appendix A). This conversation was conceived by MCF to be the launch of a potential ongoing dialogue about innovative and effective approaches to evaluating social change. MCF was also interested in exploring opportunities for building effective collaboration both among funders and between funders and grantees to advance positive social change efforts. MCF engaged BTW Consultants, an independent research and consulting group, to help plan for and facilitate the meeting. As part of the planning, BTW staff conducted brief pre-meeting interviews with most of the invited participants, seeking to understand their experience with evaluation and their hopes and expectations for the May meeting.

Meeting Format

Based on the shared interests of MCF and the other invited participants, the meeting was organized in six parts as follows:

- I. Welcome
- II. Introductions & Overview
- III. Striking a Balance Between Learning & Evaluation
- IV. Measuring Social Change – What are the Right Questions?
- V. Small Group Discussions – Food for Thought & Issues for Follow Up
- VI. Assessment of the Meeting and Next Steps

This report summarizes the discussion according to the topics above. The goal of this summary is to capture the nature of the conversation and the themes that may merit some form of follow-up.

WELCOME

Luz Vega-Marquis, President and CEO of the Marguerite Casey Foundation, offered welcoming remarks. She noted that MCF is “*deeply committed to positive social change—to building a more equitable and just society by mobilizing and giving voice to those who are under-represented and under-served.*”

While passionate about this purpose, Luz also expressed concern that with all of the resources that have been invested over the years in social change efforts, there are still so many challenges, so many problems to be solved, and so many needs to be met. This, from her perspective, makes today’s discussion that much more urgent. It is essential that we understand what methods are effective to achieve our desired results, that we share information and learn from one another, that we build and support the development of capacity to do effective work, and that “*we, within philanthropy, make better investments based on information and knowledge.*”

INTRODUCTIONS & OVERVIEW

The meeting began with participants having an opportunity to share either an “Aha!” they had in preparing for the meeting or identifying one thing they hoped to learn from the day’s discussion.

The following summarizes the comments made during this round-robin session. Some of the remarks are categorized as “Pleasant Surprises and New Understanding,” while others are “Ideas for New Practice or Suggestions for Future Work.” In many ways, these wide-ranging comments represent important themes that re-emerged throughout the day as well as in proposed next steps.

Pleasant Surprises and New Understanding

- ✓ ***I think we need a new metaphor.** We have relied on the scientific model where we test and we prove and it’s linear; maybe we need to adopt a biology metaphor where we learn and we think in terms of evolution and change.*
- ✓ *There is a **depth and vibrancy** to the discussion of evaluation – it is important to assess progress and understand impact.*
- ✓ ***I was inspired** to think in different ways about working with grantees on evaluation.*
- ✓ *There are many **different levels of analysis**. What level is most important to us?*
- ✓ ***Are we really talking about measurement** or are we talking about describing what we have done—doing a better job of narrating stories so that we understand the difference that is being made.*
- ✓ ***“Evaluation” is a multi-headed creature** that speaks differently to different people—numbers, stories, learning, progress—there are different ways that people think about and understand the concept of evaluation.*
- ✓ ***The language of change doesn’t always work** for everybody. Sometimes people are seeking stability not change. Change isn’t by definition “good.” Sometimes people want a stop light and they organize to have one. Is that social change? It is good for the community.*
- ✓ ***Everyone struggles.** The questions that I thought were unique to me in my position are questions that everyone has—that is reassuring; I didn’t miss the answer to the question: How do you evaluate social change?*
- ✓ ***We come with different motivations**, and depending on our motivation we will engage differently. Are we interested in evaluation to affirm the grant choices we are making—to prove that what we are funding is worth the investment? And if so, to whom are we making that case? Our trustees and our boards? Do we evaluate because we want to learn something? Do we evaluate to help our grantees improve practice? We need to*

clarify our motivation for evaluation because that will determine whether we have a basis for collaboration.

- ✓ ***In doing this work [evaluation] we need clear values**—the value of involving the grantee for example.*
- ✓ ***We need honesty in our relationships** with our grantees. We have a success bias in our work. Our grantees want us to think they are successful because it is a competitive environment and they need our support. We want our trustees to think that we are successful, that we are spending the foundation's resources wisely on good programs that are achieving excellent results. If we want to learn, then we need to have honest dialogue that includes failed endeavors.*

Ideas for New Practice or Suggestions for Future Work

- ✓ *I have been thinking about how and whether we can **develop benchmarks** for social change. What are the indicators of the positive social progress that will enable us to know that we're moving in the right direction?*
- ✓ ***How do movements evaluate themselves?***
- ✓ *Even if a movement "moves," **what value did funding add?***
- ✓ *How do you manage the tension between **meaningful and credible evaluation?***
- ✓ *I think we need to acknowledge that grantees are monitoring themselves—they care deeply about whether they are making a difference—it is their life's work. So how do we honor and support their efforts?*
- ✓ *I want to know how we can **build assessment and learning into our grants**, not as an "add on" but as an essential component of the work itself.*
- ✓ *I want to know whether and how we can use evaluation to bring in more resources, **find more "kin" to support social change work.***
- ✓ *The "grants in common" analysis suggests that there are many organizations we are all funding. **What can we learn from one another?** How can we work together to make those investments stronger and better?*
- ✓ *I'm not so sure about **collaboration. It's hard and it's not always helpful.** Maybe we need to think differently about it—sharing information is a form of collaboration.*
- ✓ ***It is the change that happens to people that is sustainable** over the long term – like those of us here today because we were involved in a social movement that transformed our lives. We are continuing our work because of those early and defining experiences.*

How do we capture the change that happens to people who are involved in social movements? How do we measure when, where and why that change occurs?

- ✓ *There may be an opportunity for those of us who are already committed to the Florida site visit **to collaborate on an evaluation.***

STRIKING A BALANCE BETWEEN LEARNING & EVALUATION

At this point, Tom David, Director of Evaluation and Organizational Learning from MCF, offered the following reflections on his motivation for calling this discussion.

Last September the Ford Foundation sponsored a gathering in eastern Canada (Grey Rocks Conference) among evaluators, activists, community organizers, and a limited number of funders to discuss different approaches to strengthening “the forces of positive social change.” This session was explicitly an international exchange with a global focus.

Tom became aware that many participants working overseas were uncomfortable with the language of evaluation; evaluation was perceived to be something that was “done to grantees” rather than something from which grantees could benefit. Moreover, in many respects it was the funders who were blamed for giving “evaluation” a bad reputation, in part because of how evaluations have been used and how they have been conducted.

Tom and a few other funders began to talk about developing principles of “just evaluation” that would frame evaluation as a mutual learning opportunity—a partnership between funder and grantee where the emphasis would be on reflection and improved practice. It was this conversation that inspired him to call today’s meeting. The goal, from his perspective, would be to bring together funders of social change efforts to explore approaches to evaluation and opportunities for collaboration, building on some of the discussion at the Grey Rocks Conference about “just evaluation.”

Tom indicated that eventually a conversation about evaluating social change needs to involve practitioners. Based on the Grey Rocks discussion, however, he felt it important to provide the philanthropic sector with an opportunity to explore and potentially build its own common ground first before inviting others in. This conversation was, in Tom’s mind, the very beginning of a process that would eventually involve many others including practitioners, evaluators, activists, and organizers.

MEASURING SOCIAL CHANGE – WHAT ARE THE RIGHT QUESTIONS?

The next part of the meeting involved an exercise designed to illuminate the many different ways that funders approach evaluation, beginning with the questions they ask. Like any research endeavor, all evaluations begin with a question or a set of questions to be answered. The methods for data collection, analysis, interpretation, and utilization, all follow from the nature and scope of the questions posed. Participants were provided with a write-up for a social change organization dedicated to improving wages, conditions, and benefits for the working poor in communities across the country.¹ The instructions indicated that they were providing a grant to the organization and were now about to have a conversation with other funders of this organization to explore how to evaluate the organization's success. Operating within their real organizational culture and constraints, participants were asked to generate the questions they would want answered through evaluation.

The exercise demonstrated how funders approach evaluation differently, with varying perspectives and expectations and interests. It gives evidence to the challenge of collaborating on an evaluation. The questions one wants or needs answered from an evaluation drive everything from cost to methodology. This exercise provides us with valuable insight into how the language of evaluation is used by different people to mean different things. It is also clear that from the perspective of the grantee the range of demands made by funders for “evaluation” or “results” can create competing interests and a drain on resources.

The kinds of evaluation questions people generated during this exercise spanned quite a bit of ground. They included process questions, asking the grantee “how” things are going, to outcome questions that focused on specific changes within the population that the grantee was targeting. Some funders wanted the evaluation to address the organization's capacity with respect to infrastructure and leadership, while others wanted the evaluation to demonstrate the organization's capacity to learn—to collect and apply information.

What follows are the actual questions the group generated during this discussion, organized thematically.

Remember, the topic of this discussion was: Given that you are funding this organization, what are the questions you want (or need) answered by an evaluation?

The Questions Themselves

❖ **Process: *How did the work transpire, with whose involvement and in what context?***

- ✓ *What allies if any did you develop in order to strengthen the quality of life for low-income people?*
- ✓ *What change was experienced within the organization during the grant period?*

¹ The organization profiled in the write-up was based on a real grantee organization, but its specific identity was “blinded” for the sake of the exercise.

- ✓ *How were coalitions built, and who was involved in them?*
- ✓ *How are local people (stakeholders) involved in setting the organization's goals and objectives?*
- ✓ *How many and what kinds of local people are actually involved in the local coalitions and why?*
- ✓ *Who are the community people and organizations involved in this work, and what is motivating their involvement?*
- ✓ *Given this organization's focus on faith-based coalitions, have new faith groups been brought into the work?*
- ✓ *How does the rural south differ from the urban settings in terms of organizing tactics and strategies?*

❖ **Organizational Capacity: What is the organization capable of managing?**

- ✓ *What is the history of leadership and governance of this organization? Is it stable?*
- ✓ *Given the ebb and flow of success and failure, how will this organization stay resilient?*
- ✓ *How will the organization measure its own success?*
- ✓ *How does the national office of this organization evaluate the work of the local affiliates?*
- ✓ *How did fundraising capacity change over time in terms of dollars raised and number of donors?*
- ✓ *How did you strengthen your network as a result of the funding?*

❖ **Outcomes: What change is happening as a result of the organization's efforts?**

- ✓ *What impact is the organization having on the issues with which it is concerned, both locally and nationally?*
- ✓ *What specific gains for low-income workers were achieved by this organization?*
- ✓ *Was the coalition successful in its campaign to promote higher wages?*
- ✓ *What happened to the people who were being served by the organization?*
- ✓ *What progress has the organization made towards movement building?*

❖ **Learning: What is the organization learning? Are lessons applied to practice?**

- ✓ *What does the organization expect to learn from the work it is doing? And does it challenge assumptions the organization had going into the effort?*
- ✓ *What did NOT go the way you planned?*
- ✓ *What did you learn about sustainability of your organization and of the local affiliates?*
- ✓ *What are the lessons from this organization (both public and private lessons) that will help advance this work?*
- ✓ *How does this organization deal with its failures?*
- ✓ *What were the successes and failures across the different affiliate sites in terms of intended results, and to what does the organization attribute the differences?*
- ✓ *What are the assumptions you are making about the work you are doing and the theory behind how you are going about improving the conditions, wages, and benefits of the working poor? (Theory of change)*

❖ **Questions for Funders**

- ✓ *How can funders collaborate with this grantee?*
- ✓ *How can foundations improve this organization's impact?*
- ✓ *How can funders who are supporting social change evaluate their grantmaking separate from this one organization? Is the grantmaking strategy effective?*

Identifying Priority Questions

After the group completed the exercise of generating evaluation questions, participants were asked to review the list and select three questions which they deemed a priority. The purpose of this exercise was to determine whether any clustering would occur once people were directed to narrow their field of vision. If there was some convergence, it would suggest that some members of the group could pursue a deeper conversation in the small group discussions either about social change efforts or evaluation issues, or both. Once participants identified their priority questions, they adjourned for lunch.

SMALL GROUP DISCUSSIONS

During the lunch break, the facilitators reviewed the list of priority questions and consolidated those that were similar. The following four issues emerged as priorities and were used to organize small group discussions for the afternoon:

1. **Organizational Learning.** What does the grantee expect to learn? How will the grantee know if the work is successful? What assumptions are being challenged in the process of implementation?
2. **Organizational Capacity.** How did the grant and the related work strengthen the organization overall?
3. **Outcomes.** What progress has this organization made with respect to movement building? What are the component parts of movement building? What are the indicators of successful movement building?
4. **Funding Strategy.** How can funders evaluate their own grantmaking strategy separate and apart from a single grantee? What are the opportunities for assessing a number of different investments that have a similar focus or anticipated outcome? (For example, evaluating several grants that are designed to achieve gains for low-wage workers, using different programmatic or organizing strategies.)

Each participant self-selected into one of these four groups with the instruction that they were to engage in a conversation about their topic for one hour and fifteen minutes. The facilitators provided several questions that participants could answer during the discussion regarding evaluation methodologies, resource allocation, etc., but the facilitators also provided the groups with the latitude to choose their own way of having a meaningful discussion about their chosen topics. The goal of the small group discussion was to investigate in greater depth areas of common interest and potential for collaboration or shared work.

During the debrief, delegates from each small group were asked to report on the “nature of the conversations” in which they engaged and to share their thoughts about “topics worthy of pursuit.” People came back from the small group discussions highly energized. Only one of the groups, Outcomes, stayed focused on their subject and used the time together to begin to brainstorm the actual “hallmarks” of movement building in America. The other groups engaged in more exploration with one another, sharing information and experiences that will be useful in establishing stronger connections that form the basis for future discussions and shared efforts.

Food for Thought & Issues for Follow-up

The following are topics or comments that came out of the small group discussions; they express both the insights some people had during the small group discussions as well as key and common issues of interest that could inspire future dialogue and/or collaboration.

❖ **New Paradigms for Social Change and Social Change Measurement**

- ✓ All of this work can perhaps fall under the broad rubric of “economic justice.” Perhaps we can make connections across a broader array of philanthropic investments and social justice organizations by placing our work under the umbrella of economic justice.
- ✓ The world is changing both in terms of the role of government (and expectations of government) and the relationship between government and the nonprofit sector. We need to incorporate the changing relationships into our paradigm for solving social and economic problems.
- ✓ There is a need for a more complete landscaping of the resources, tools, and knowledge that already exist. There is no one place to go. There is a lot of information, but it is not organized well for ready use. We need to create exchanges of information, knowledge, and experience.
- ✓ If we are going to evaluate movement building efforts, then we need to clarify the indicators of a movement being built. Our group started this by brainstorming, and we came up with a list. It would be useful to do this first, as a collective exercise before we set out to measure whether a movement is being built.

❖ **Funder Collaborations**

- ✓ We discussed the possibility of collaborating on documentation efforts. If we are funding the same organization, perhaps we can begin by just providing support to document the story of our grantees-in-common either by funding the grantees together to tell their own stories or collectively hiring a “story teller” to write the stories. Some of what we all want to know is “what happened?” Instead of us all asking for the story, maybe we can ask for (and pay for) ONE STORY. Sometimes we each get different versions of the story from the same grantee.
- ✓ It is important that we bring in (and appreciate) bigger funders to this discussion and raise the stakes on the conversation. Working in a group like this—small foundations and large ones side by side—gives us greater credibility and capacity. The smaller foundations may have more direct grassroots experience; the larger foundations have more resources and influence and may have knowledge of contextual and political realities that influence success.
- ✓ We need to develop better communication around our common investments so that we reduce duplication and maximize the utility of the information we collect.
- ✓ There is a whole other discussion about evaluating ourselves and our grant making—we are only as good as the grants we are making. How do we make our decisions? Can we be better decision-makers with more or different information?

- ✓ We need to increase the available resources for this kind of work. Maybe we can collaborate on an evaluation of a particular strategy to demonstrate its success, specifically to encourage other funders to invest in that strategy.
- ✓ Perhaps there is a way to organize collaborations according to common areas of investment.

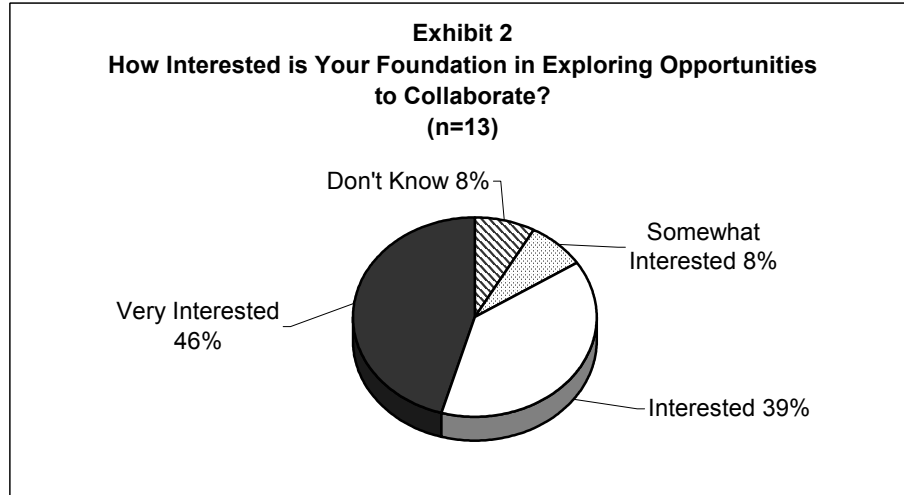
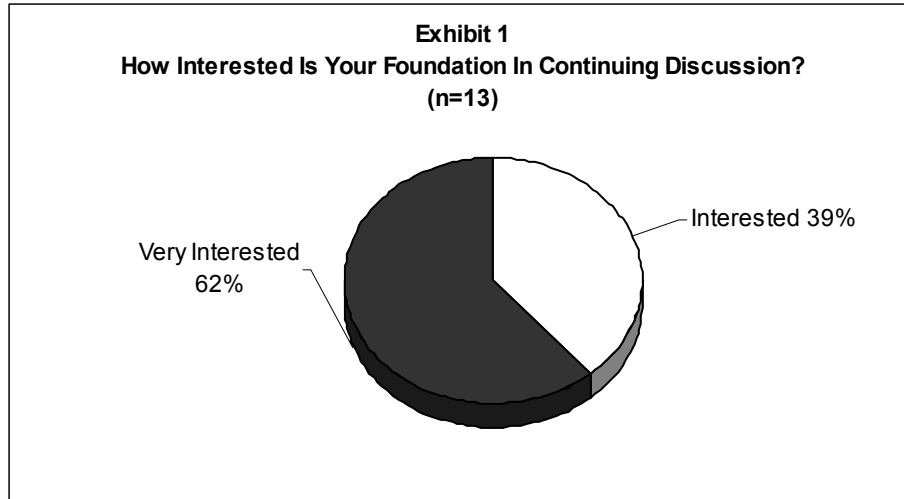
❖ Partnerships with Grantees

- ✓ We need to shift the power dynamic in some way to build more trust and partnership with our grantees. We are in this work because we believe in social change, but the power relationship can compromise honesty which does little to advance our shared objectives.
- ✓ We need to help our grantees become learning organizations—to stimulate their appetite for information and learning and support them in that process.
- ✓ We should use evaluation to strengthen organizations (not punish them).
- ✓ We need more (and regular) opportunities for conversation between funders, activists, and evaluators.

THIS IS A GOOD FIRST STEP...WHAT'S NEXT?

At the end of the meeting and as part of the meeting evaluation, participants expressed that this meeting was a good first step. Many of the participants did not know one another before this day. This meeting provided them with an opportunity to meet colleagues who share their perspectives and passions, to meaningfully connect with one another, to discuss challenging and important issues, and to begin exploring opportunities for continued dialogue and shared work. (See Appendix B for detailed results from the meeting evaluation surveys.)

Participants were enthusiastic about following-up with one another after this meeting. As shown in Exhibit 1, 100% of participants completing the session evaluation were interested or very interested in continuing the dialogue. In addition, Exhibit 2 shows that 85% of participants were interested or very interested in exploring opportunities to collaborate. Almost everyone thought of additional participants who could or should be invited to participate in any follow-up dialogue or collaborative effort. That list is included in Appendix C.



At the end of the meeting it was clear that some participants were action-oriented and prepared to make a commitment to collaborate on something concrete and actionable. Others acknowledged that they were prepared to end up with an actionable agenda, but needed more time to develop the agenda itself. The group identified many possible next steps, and participants agreed that they would reflect on the day and discuss via E-mail what the next steps should be. Below is a synthesis of the suggestions offered at the meeting as next steps for follow-up.

1. To pursue the notion of a “documentation,” with a group of funders who are already funding the same organization(s).
2. Related to the above, organize a discussion specifically among funders who ARE funding the same organization(s) and go deeper into opportunities for shared work (from reporting requirements, to evaluation issues, to collaborative tool development and implementation).

3. Organize a discussion by method or strategies for social change since some funders are working exclusively in support of one or another approach to social change. (e.g., community organizing, criminal justice reform, etc.).
4. Identify organizations or Web sites that could serve as a repository for information gathering, organizing, and sharing about social change investments and evaluation (e.g., GEO).
5. Identify upcoming meetings at which we can continue this conversation and build on our ideas for collaboration.
6. Ask each participant to describe a project that they would like to do collaboratively and submit it to the full group for review and discussion and for the purpose of identifying potential partners.
7. Continue this discussion using a real case study to go deeper into the challenges and opportunities of evaluation.
8. Spend time together identifying credible and meaningful indicators of movement building.
9. Work together on a case statement regarding community organizing and social change work in order to recruit new funders in this dialogue.
10. Use this group itself to vet ideas and get feedback for projects we are already considering or projects (organizations) that have approached us for support.

IN CLOSING...

At the conclusion of the day-long meeting, the room was abuzz with ideas and new connections. It will be important to capitalize on this enthusiasm and maintain positive momentum in this journey towards “just evaluation.”

APPENDICES

Appendix A: **List of Attendees**

Appendix B: **Results from the Meeting Evaluation Surveys**

Appendix C: **Individuals and Organizations to Invite to Future Dialogues or Collaborative Undertakings**

Appendix D: **Dispensing with Jargon**

**APPENDIX A
LIST OF ATTENDEES**

MEETING ATTENDEES

Jacqueline Baillargeon
Open Society Institute

Dave Beckwith
The Needmor Fund

Ruth Brousseau
The California Wellness Foundation

Pamela David
Walter & Elise Haas Fund

Tom David
Marguerite Casey Foundation

Christine Doby
Charles Stewart Mott Foundation

Marci Eads
Gill Foundation

Marjorie Fine
Unitarian Universalist Veatch Program

Gabriel Giordani
Marguerite Casey Foundation

Idelisse Malave
The Tides Foundation

Katherine McFate
Rockefeller Foundation

Randy Newcomb
Omidyar Foundation

Torie Osborn
Liberty Hill Foundation

Jeff Pinzino
Woods Fund of Chicago

Michele Prichard
Liberty Hill Foundation

Victor Quintana
Unitarian Universalist Veatch Program

Sarita Siqueiros
Marguerite Casey Foundation

Alta Starr
New World Foundation

Urvashi Vaid
Ford Foundation

Luz Vega-Marquis
Marguerite Casey Foundation

Chantel Walker
Marguerite Casey Foundation

FACILITATORS

Jill Blair
BTW Consultants

Fay Twersky
BTW Consultants

UNABLE TO ATTEND

Kim Amman Howard
Omidyar Foundation

Sally Kohn
Ford Foundation

Gara Lamarche
Open Society Institute

Spence Limbocker
Neighborhood Funders Group

Ricardo Millet
Woods Fund of Chicago

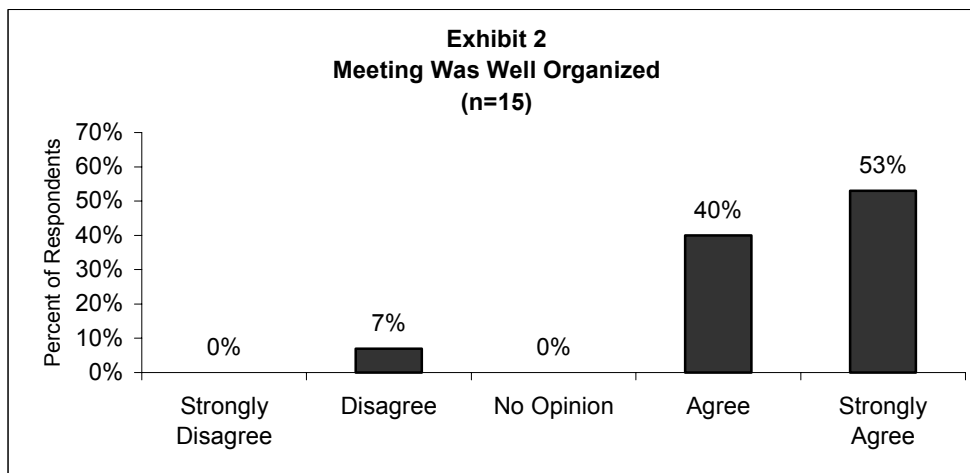
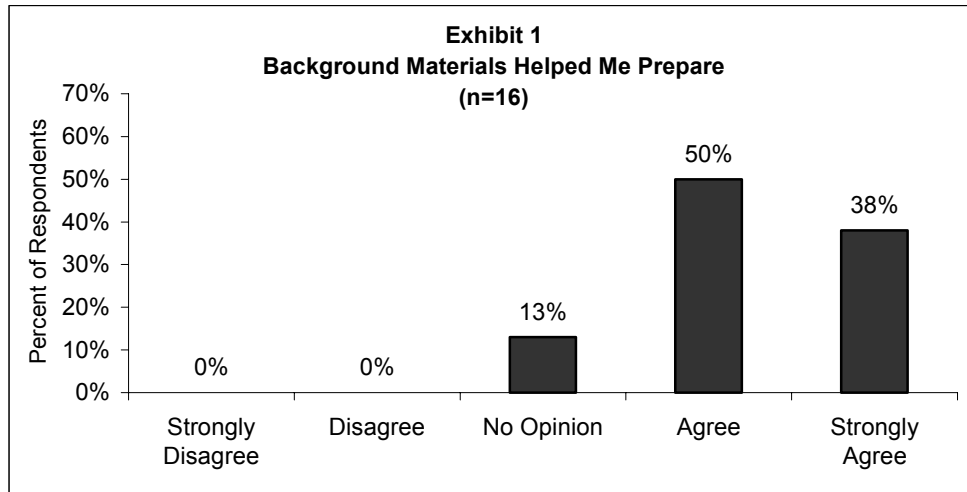
Chris Page
Rockefeller Philanthropy Partners

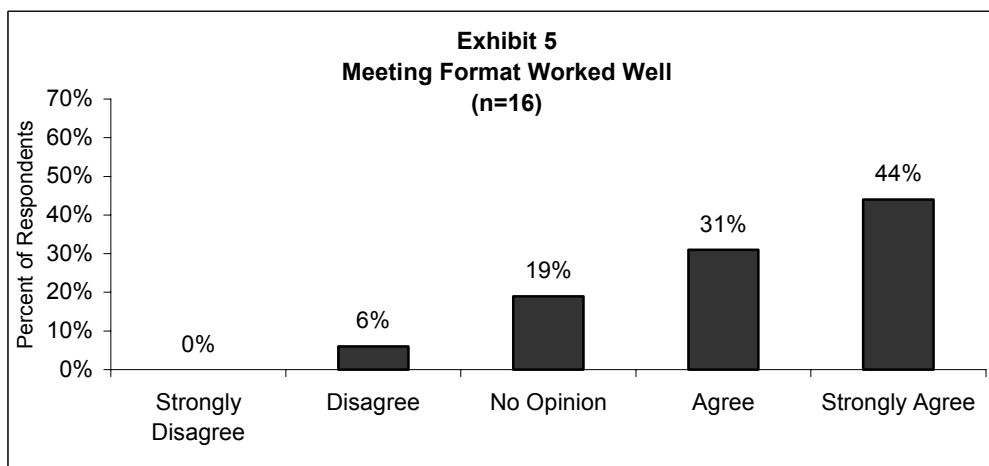
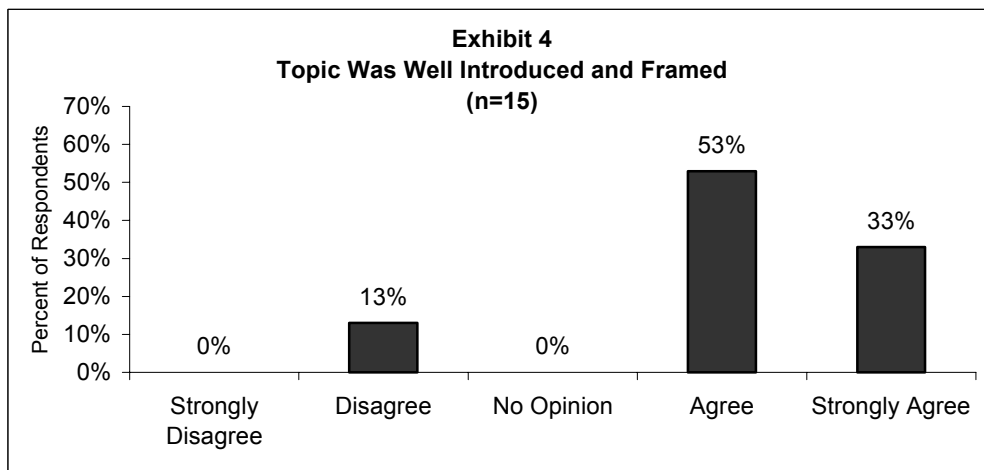
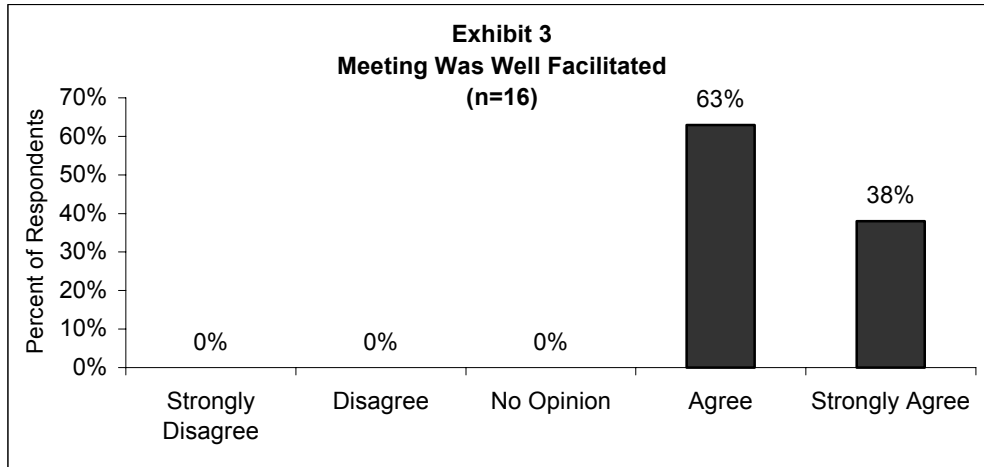
Cristina Regalado
The California Wellness Foundation

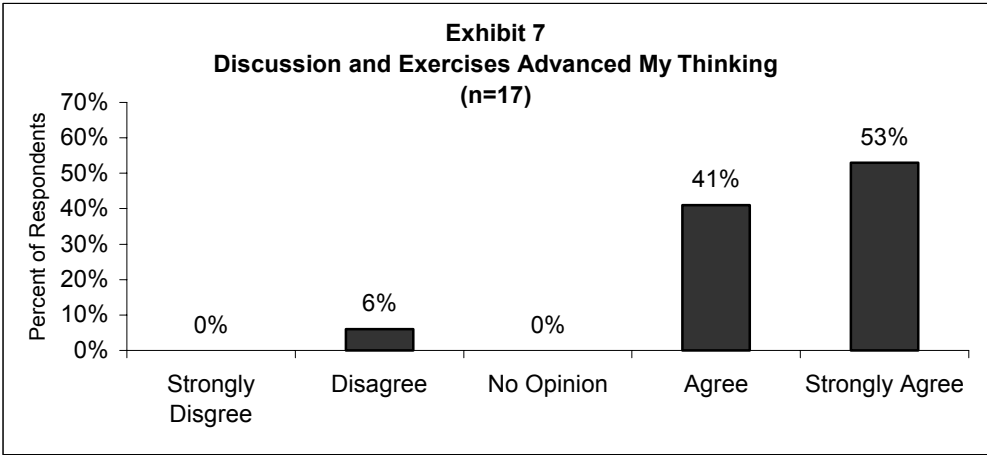
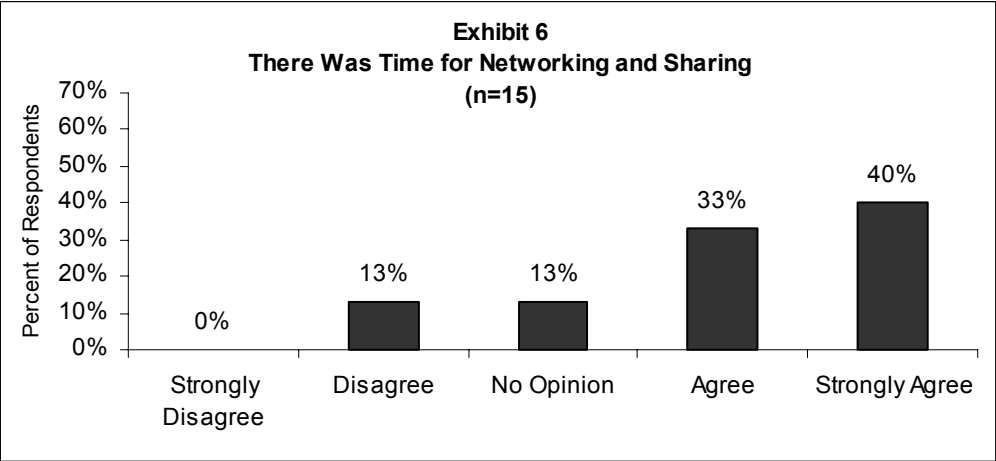
APPENDIX B
RESULTS FROM THE MEETING EVALUATION SURVEYS

RESULTS FROM THE MEETING EVALUATION SURVEYS

As shown in Exhibits 1-7, the vast majority of participants expressed that they felt the meeting was well-organized and well-facilitated, that the topic was well-introduced and framed, that the background materials helped them prepare for the meeting. Most importantly, they felt that the discussion and exercises advanced their thinking. When asked what could have been improved about the meeting, the most common response was, "More time!"







OPEN-ENDED QUESTIONS AND ANSWERS FROM THE MEETING EVALUATION SURVEYS

Below are responses to the open-ended questions on the meeting evaluation surveys. The responses have been sorted by themes.

Q2: What is one idea or insight you are taking away from today's meeting?

Better Understanding of Evaluation:

- The notion that evaluation has to address the “biology” or relationship aspects of social change work.
- There is much more of a consensus on reasons for and ideas about evaluating social change than I ever would have imagined.
- Biology framework – how to continue this work
- The complexity of the evaluation challenge and the need to unpack this task and to frame it in a fashion that serves the variety of stakeholders and that serves building progressive power.
- Need to think more about evaluation at our foundation and physics & biology.

Better Understanding of Movement Building:

- Better understanding of movement building, key components and the challenges to assessing it.
- Better definition of “movement building” that resonates.

Sharing Ideas and Knowledge Resources:

- Different people here would be good to bounce off ideas about a cluster analysis I am doing.
- Need to share our ideas and experiences with each other.
- We need a mechanism for information sharing on evaluation that is happening, evaluation that needs to happen, and tools/methods. There's so much going on – I feel compelled to know it all, and I can't, but I also feel confident that there's so much to draw on.
- Lots of innovation and knowledge out here to draw on.

Growing Community of Funders:

- Others with much more money than us could be mobilized to support organizing.
- There is a conversation about evaluating social change funding and it's growing, and may help impact philanthropy to further invest in social change work.
- Commitment of others to make effort to continue this dialogue and find ways to act on joint projects in short term.
- The need for collaboration and the challenges to doing it well.

Q3: What did you enjoy most about today's meeting?

People, Ideas and Connections Made:

- People
- The smart people gathered here. Common vision shared by most is inspiring.
- Conversation, good ideas, and good thinkers.
- The sense of camaraderie among the group.
- Shared brain power, analysis people bring to it, level of discussion.
- Connections with other funders I didn't know before. Great spirit, good humor, good sharing.
- Meeting others.
- Listening and learning from other funders.
- Information sharing, collaboration on the topic, networking.
- Personal connections.
- The people/intelligence/thankfulness/history.
- Bonding with officers with same values; physics envy, complexity theory, individual transformation.
- The group of people – so many good ideas and commitment to social change.

Facilitators and Meeting Structure:

- The facilitators and organizers created an agenda that allowed participants to engage in a difficult discussion with seriousness and fun and a commitment to building concrete opportunities for collaboration.
- Small group was dynamite! Rich, positive, powerful, creative, learning experience.
- The group (their heart!); the facilitators' warmth and clarity.

Q4: What are your suggestions/recommendations for how today's meeting could have been improved?

More Time:

- This could easily be a longer retreat (although the time we had was used well).
- More break time for 1/1 or self-organized conversation.
- Longer meeting with breaks, maybe 2 days; not assume this is the first or only effort like this.
- Tough to only do one day, but understand time is tight.
- A little more time.
- 1. longer time; 2. more time defining terms; 3. more time sharing what we know and are trying to do in evaluation.
- More time.
- Need more time, so much to be talked through.

Better Definitions:

- Rather than pre-meeting discussion on evaluation, more focus on what folks mean by social change.
- More context-setting: pull away and place context, even if conditional for where social change philanthropy is at.

Funder Participation:

- Perhaps presentation of what we/individual funders have experienced with evaluation (case studies).

General Comments:

- It was a good use of time.
- You did great!
- It was a great beginning conversation and looking forward to more!

APPENDIX C
INDIVIDUALS AND ORGANIZATIONS TO INVITE TO FUTURE DIALOGUES OR COLLABORATIVE
UNDERTAKINGS

INDIVIDUALS AND ORGANIZATIONS TO INVITE TO FUTURE DIALOGUES OR COLLABORATIVE UNDERTAKINGS

At the end of the meeting, participants offered the names of individuals and/or organizations who might be invited to participate in future efforts of this sort.

Individuals:

- Martha Campbell, The James Irvine Foundation
- Sylvia Yee, Evelyn & Walter Haas, Jr. Fund
- Spence Limbocker or Bettye Brentley, Neighborhood Funders Group
- Kathleen Enright, Grantmakers for Effective Organizations
- Alison Fine, Innovation Network
- Mike Edwards, Ford Foundation
- Victor De Luca or Millie Buchanan, Jessie Smith Noyes Foundation
- Renee Brereton, Catholic Campaign for Human Development (CCHD)
- Robert McKay, The McKay Foundation
- Donna Edwards, The Arca Foundation
- Janet Schenk, AFL-CIO
- Susan Chinn, The Discount Foundation
- Roz Lee, Jewish Fund for Justice
- Sara Rios or Laura Livoti, French American Charitable Trust (FACT)
- Henry Allen, The Hyams Foundation, Inc.
- Geraldine Mannion, Carnegie Corporation of NY
- Emily Goldfarb, The Community Organizing Toolbox (or GoldRio Consulting)

Organizations:

- The McKay Foundation
- FACT
- The Annie E. Casey Foundation
- Joyce Foundation
- Carnegie Corporation of NY
- American Evaluation Association
- Vanguard Public Foundation
- Southern Partners Fund

APPENDIX D
DISPENSING WITH JARGON

DISPENSING WITH JARGON

At the start of the day's discussion, the facilitators acknowledged that during their background interviews some people asked for time to be spent clarifying and defining terminology. A chart pad was posted for people to list the terms they wanted to better understand. We did not have time to review those terms, but we offer them here as examples of jargon that are often used and may not always be fully understood. In most cases, the jargon does not simply require a technical definition, but also a philosophical one.

Sustainability

Social Change

Evaluation, Assessment and Learning

Culture

Resilience

Movement Building

Learning Organization