Measuring
What Matters

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Dana Doan and Barry Knight

Contents

This report is a work in progress, and is one step in a much longer process. The report outlines the process up to this point, and is intended to spark further discussion and experimentation, as well as to encourage more individuals to get involved in conversations around measuring what matters.

Executive summary

This consultation paper is designed to advance a conversation about measurement in civil society. The goal is to identify more meaningful approaches to organizational learning and accountability. The paper is jointly published by published by Candid, the Global Fund for Community Foundations (GFCF) and Philanthropy for Social Justice and Peace (PSJP).

Over a two-year period, 130 people from civil society from all over the world came together in a series of parallel and intersecting conversations, online and in-person, to co-create this document. It is now being published to widen those discussions and to advance the co-creation process still further. A list of those involved forms Annex A.

To date, these conversations have resulted in increased understanding about the challenges involved in measurement, identification of some promising areas for exploration, guiding principles for any system of measurement, and two recommended action steps. The group has discussed challenges and concerns about existing approaches, offered promising ideas and opportunities for exploration, and presented guidelines for a better system of measurement. These virtual and in-person gatherings were proposed by individuals working in non-profit organizations around the world. This effort was not initiated by a funder or regulator. Instead, it was initiated by groups of non-profit professionals, working on different issues in different parts of the world, who recognized a common challenge and desire to improve their respective measurement systems.

It is important to the members of this working group that any measurement system be designed for and by themselves, rather than something imposed remotely by external agencies. Members of this group requested facilitation or financial support for their meetings from different support organizations, including: Candid, GFCF and PSJP. This funding covered facilitation and travel costs for meetings, which is just a fraction of the effort involved. Individual members contributed their own time and expertise to undertake this work.

To date, these conversations among people working in the field generated examples of opportunities and challenges, alternative tools and approaches, as well as principles for measurement. Some of these findings are summarized in the following bullet points:

- Contrary to a common narrative, community philanthropy **leaders are motivated to measure** what really matters and are frustrated by constant pressures to allocate resources to measuring things that they believe do not matter.

- **Measurement capacity** is a struggle. Community philanthropy practitioners cite lack of resources (time, staff, training) to measure well along with concerns regarding the security of people whose information they may be collecting and expected to share.

- There is a **measurement mismatch** between what people working at the local level see and feel is important and what funders want to hear is happening. Often this challenge was relayed in terms of linear logic models, which require over-simplification and often limit a more holistic or collaborative approach.

- Practitioners expressed confusion with regards to the **unit of measurement**. Should organizations prioritize measurement of the impact of a programme, the impact of an organization, and/or the impact of a network or field? Though there may be a desire to assess all three levels, the capacity to measure one level is already under strain.

- **Alternative systems of measurement** will need to address visions of community that is respectful of nature, adapts to change, acknowledges that we live within concentric circles, includes communities on the edges, and focuses on human flourishing or well-being. The ACT (assets, capacities, trust) framework is one approach now under development.

- **Meaningful measures** present an on-going but welcome challenge for community philanthropy practitioners. While "thick" concepts are believed to be key to development, there are many questions about how to demonstrate progress on building hope, participation, resilience, dignity, and trust.

- **Tools and technology** are perceived as mixed blessings. While some find technology as socially distancing or unproductive, others view it as offering untapped opportunities, particularly once relationships are already established. Meanwhile, the vast number of tools and approaches for measurement can be daunting, yet there is general interest in applying a variety of tools. The tools often cited included: storytelling, outcome mapping, outcome harvesting, Vital Signs, social return on investment, etc. The network recently contributed to a new tool called PANDO, which generates network maps that seek to measure trust and relationship quality.

- **A set of principles** was deemed necessary to guide the creation of an alternative measurement system. In imagining what measurement could be, peers frequently expressed concerns about what measurement should not do. To date, these principles have led to the following four, overarching success criteria: (1) it will be useful, and it will be used; (2) it will be easily adaptable to different contexts and

interests; (3) it will provide inspiration rather than standardization; (4) it will be accountable and empowering to the people and communities we aim to serve.

The people involved in these dialogues expressed a strong commitment to inform the development of a better measurement system for community-led development. To do this, two work streams have been proposed as next steps: local experimentation and dialogues with funders. Local experimentation refers to the development of a series of case studies that would compare a people-led lens of measurement with a traditional monitoring and evaluation approach. In the second work stream, the group plans to share the implications of their local experimentation with funders and use it to negotiate measurement practices moving forward.

This paper is a work-in-progress. It is intended to serve as a platform for further development. In summarizing past literature and disseminating findings from parallel and intersecting conversations pertaining to measurement, we hope to support further discussion regarding the principles and actions taken by those working in the field to build a more meaningful measurement system for their work.

Background

The question of measurement is not new. In their classic study of the 'War on Poverty' in 1960s America, Peter Marris and Martin Rein found that scientific criteria of measurement could not capture what was important about community action.[1] Non-profits have long struggled to identify a system of measurement that is meaningful to their multiple stakeholders, regularly fighting off attempts to apply simple, standardized systems of measurement to what is viewed as complex, non-linear work.[2] Despite pioneering work by Robert Chambers, Rajesh Tandon, Madine Vanderplaat, Kimberlé Crenshaw and others, a focus on thick concepts and participatory methods of measurement have failed to make inroads into the accepted hierarchy of evidence. In the spheres of development aid and institutional philanthropy, complex outcomes (for example, 'increased dignity') invariably take second place to easily measured outputs (for example, 'number of wells drilled').

Power imbalances, such as that which exists between funders and grantees, are shown to influence prevailing approaches to non-profit performance measurement.[3] This research indicates that this tendency towards upwards accountability, whereby non-profits focus on the needs and expectations of donors or regulators, has resulted in a shifting of scarce resources away from mission and reduced responsiveness to community interests. At the same time, non-profit staff and funders both report low

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1   Marris, P. and Rein, M. (1967) *Dilemmas of Social Reform: Poverty and Community Action in the United States*, London: Routledge & Kegan Paul for Institute of Community Studies.

2   Barman, E. (2016). *Caring Capitalism: The Meaning and Measure of Social Value in the Market*. New York: Cambridge University Press. Ebrahim, A. & V.K. Rangan, (2014). "What impact: A framework for Measuring the Scale and Scope of Social Performance." California Management Review, Vol. 56(3): 118-41. Daehler-Larsen, P. (2012). The Evaluation Society, Stanford University Press, Stanford, California (p.9). Eckerd, A. & Moulton, S. (2011). "Heterogeneous Roles and Heterogeneous Practices: Understanding the Adoption and Uses of Nonprofit Performance Evaluations." American Journal of Evaluation, Vol. 32(1): 98–117. Campbell, D. (2002). "Outcomes assessment and the paradox of nonprofit accountability." Nonprofit Management and Leadership, Vol. 12(3): 243–259.

3   Francis, M. M. (2019). "The Price of Civil Rights: Black Lives, White Funding, and Movement Capture." Law & Society Review, Vol. 53(1): 275–309. Kohl-Arenas, E. (2016). *The Self-Help Myth: How Philanthropy Fails to Alleviate Poverty.* University of California Press: Oakland. Khieng, S. & Dahles, H.(2015). "Resource Dependence and Effects of Funding Diversification Strategies Among NGOs in Cambodia." Voluntas, Vol. 26: 1412-1437. Hwang, H. & Powell, W.W. (2009). "The Rationalization of Charity: The Influences of Professionalism in the Nonprofit Sector." Administrative Science Quarterly, Vol.54(2009): 268-298. Benjamin, L. M. (2008). "Bearing More Risk for Results: Performance Accountability and Nonprofit Relational Work." Administration & Society, Volume 39(8): 959–983. Benjamin, L.M. (2010). "Funders as Principals, Performance Measurement in Philanthropic Relationships." *Nonprofit Management and Leadership*. Vol. 20(4). Bornstein, L. (2006). "Systems of Accountability, Webs of Deceit? Monitoring and Evaluation in South African NGOs." *Development*, Vol. 49(2): 52–61. Ebrahim, A. (2005). "Accountability Myopia: Losing Sight of Organizational Learning." Nonprofit and Voluntary Sector Quarterly, Vol. 34(1): 56–87. Edwards, M., & Hulme, D. (1996). "Too close for comfort? The impact of official aid on nongovernmental organizations." World Development, Volume 24: 961–973.

utilization of performance measurement data.[4] Meanwhile, there are valid concerns about evaluation misuse.[5]

Renewed attention towards community-led development and the growing popularity of community philanthropy, together with the associated #ShiftThePower movement, gives the issue of measurement a new salience. The catchphrase, "nothing about us without us", coined by leaders of the disability movement, is increasingly invoked as a reminder to organizations to hold themselves accountable to their communities. Meanwhile, the emergence of community philanthropy approaches, which involve both giving and seeking resources within the same community, disturbs the Global North's neat distinction between donor and recipient in a philanthropic exchange.

What is Community Philanthropy?

"*Community philanthropy is both a form of, and a force for, locally driven development that strengthens community capacity and voice, builds trust, and most importantly, taps into and builds on local resources, which are pooled together to build and sustain a strong community.*" (Doan, 2019: 7; based on Pond & Hodgson, 2018: 5)

Despite their differences, community-led organizations and community philanthropy organizations are typically focused on generating support through exchange and solidarity, which presents a stark contrast to top-down gifts driven by charity or contracts using service level agreements. Following early feminist writer, Mary Parker Follett, this model is based on 'power with', rather than 'power over.'[6] G. Albert Ruesga takes Follett's model one step further by demarcating philanthropy into three types: top-down philanthropy (*to* the grassroots), meaningful citizen participation (*with* the grassroots), and mutual aid groups (*by* and *from* the grassroots).[7]

There is a growing demand for change. At the 2016 Global Summit on Community Philanthropy in South Africa and the 2019 Pathways to Power Symposium in the United Kingdom, there were calls for actors from the Global North and South to become equal partners in development relationships. A study prepared for the 2019 Symposium identified five key transformations necessary to achieve the desired change.[8] Among these five transformations was the need to reframe the way we think about measurement. Specifically, the study argued that what is known in scientific circles as the 'hierarchy of evidence' is in need of reform.[9] While the hierarchy is a useful guide for

4   Innovation Network (2016). "State of Evaluation 2016: Evaluation Practice and Capacity in the Nonprofit Sector." Accessed on March 20, 2019 at: https://www.innonet.org/media/2016-State_of_Evaluation.pdf. CEP (2016). Benchmarking: Foundation Evaluation Practices. Accessed on March 20, 2019 at: http://research.cep.org/benchmarking-foundation-evaluation-practices.

5   Dahler-Larsen, 2012; Weiss, C. H. (1998). *Evaluation: Methods for studying programs and policies.* Prentice Hall. Campbell, Donald T (1979). "Assessing the impact of planned social change." *Evaluation and Program Planning*, Vol. 2(1): 67–90.

6   Follett, M.P. (1995) 'Power', in P Graham (ed), *Mary Parker Follett: Prophet of management: A celebration of writings from the 1920s*, Washington DC: Beard Books, pp97–120.

7   Rusega, G. A. (2011). "Civil Society and Grassroots Philanthropy." Chapter 36 in Edwards, Michael (Ed.) *The Oxford Handbook on Civil Society.* Oxford University Press.

8   Knight, B. (2019) *Systems to #ShiftThePower*, Johannesburg: Global Fund for Community Foundations

9   Greenhalgh T (July 1997) 'How to read a paper. Getting your bearings (deciding what the paper is about)'. BMJ. 315 (7102): 243–6. doi:10.1136/bmj.315.7102.243. PMC 2127173. PMID 9253275

evaluating interventions with clear goals, easily measured variables, and a counterfactual, it is not appropriate – and can prove harmful – if applied to complex initiatives working to build emergent solutions under uncertainty, particularly when there are limited resources and little scientific expertise on tap.

In such circumstances, a different method is needed. In situations where there is no tried and tested answer that has worked before, and people are trying out different approaches, the job is to use our moral imagination to find new solutions.[10] This requires a method of assessing progress that is in tune with emergent learning, which is the starting point for this paper.

10   Lederach, J.P (2005) *The moral imagination: The art and soul of peacebuilding*, Oxford University Press.

Methodology

This paper is part of a journey towards a measurement system for organizations committed to community-led development. To build towards this new system of measurement, the members of this group set out to answer three key questions:

1   How can the field organized around people-led development build a measurement system to demonstrate the added value of this work?

2   How can organizations and funders transfer measurement power and responsibility to people who are often marginalized, while simultaneously ensuring robust mechanisms of accountability and transparency?

3   What kind of support does the field need to develop measurement practices that contribute to learning and communication in the field?

The paper draws on three strands of work that all aim to learn from the diversity and complexity of community-led development and community philanthropy in different contexts and cultures across the world. These strands of work were facilitated by different but connected support organizations: Candid, the GFCF and PJSP. A list of individuals and organizations engaged in these three strands of work is available in Annex A.

The first strand of work was supported by the GFCF. To build understanding about the field of community philanthropy, the GFCF engaged practitioners from different parts of the world in two face-to-face meetings, six webinars, and a Symposium. A key focus of these meetings was focused on how each participant goes about measuring the core outcomes of their work: building assets, capacities and trust (see page 38 for more information about the ACT framework). Two meetings with 15 community philanthropy practitioners were held, one in South Africa in 2018 and one in Mexico in 2019. Each participating organization fulfilled three criteria for attendance, by:

■   Building local cultures of giving and community assets as a strategy for strengthening local ownership, flattening power and building local constituencies;

■   Using grantmaking – in addition to other kinds of supports – as a development tool, aimed at strengthening local community agency, and collective action; and,

■ Being conversant with the ACT framework and interested in exploring strategies for measurement and developing evidence.

The findings from these two meetings were written up and formed the basis for six webinars that extended participation beyond the original 15 participants to include other individuals working with organizations adopting the principles of a community philanthropy approach. The feedback was discussed in two workshops at the November 2019 Pathways to Power Symposium held in London.

In the second strand of work, Candid set out to generate knowledge around global practices of community philanthropy as practiced by different civil society organizations in different country contexts. This work, taking place between 2019 and 2020, involved five meetings with different groups in Brazil, Canada, Serbia, Russia, and the United States. The meetings involved listening to practitioners and focused on three open-ended questions:

■ How do you currently manage knowledge within your organization?

■ How do you tell the story of your work and how do you share what you're learning with colleagues?

■ How might we better manage and share our collective knowledge to build the field of community philanthropy?

For the third work strand, PSJP facilitated a series of online exchanges among civil society organisations in different parts of the world during 2018 and 2019. The aim of these exchanges was to unpack key concepts in philanthropy and development, such as 'dignity', 'leadership', and 'sustainability.' The issue of measurement became a central theme in these conversations so three webinars were held to explore this theme using the following questions:

1 How do you measure social change in your organization?

2 What works well and what are the challenges?

3 Is there a difference between what you want to measure and what your funders think should be measured?

4 If so, what are the main differences and how do you deal with this?

5 Are there things you would ideally like to measure but can't?

6 What support would you like to address this?

At the end of 2019, in response to participant requests for a face-to-face meeting, PSJP organized a retreat in Nepal for individuals taking an active part in the online conversations. Although a wide range of topics were addressed at this retreat, the issue of measurement once again figured prominently in these discussions.

Although these three workstreams were conducted separately, they share four important features. First, the distinctive value of the research for this paper is that it draws on discussions among practitioners from different kinds of civil society organizations operating in different contexts. The meetings included community foundations, identity groups, community-based organizations, NGOs, INGOs, international funders, philanthropy networks, and other support organizations. As such, this paper summarizes feedback and presents recommendations from individuals with practical experience, as opposed to theoretical models promoted by social scientists or consultants.

A second commonality among these strands is that work began with a blank sheet, allowing findings to emerge from the data, rather than being driven by a specific hypothesis. The first meeting held by the GFCF in South Africa used 'open space' principles from beginning to end.[11] Similarly, the work conducted by Candid and PSJP was based on open-ended questions without any presupposition about what kind of answers would be acceptable.

Third, all three strands of work were based on a 'create and adjust' principle. As findings began to emerge, they were written up and reports used as a basis for further discussion. As discussions progressed, findings became more detailed and nuanced, as did subsequent discussions.

Finally, as these three work processes intersected, they resulted in broad agreement as to the challenges and opportunities to move towards an improved system of measurement for the field. Participants believe that measurement is centrally important yet difficult in local contexts where issues that matter to local people are hard to capture and often ignored or de-prioritized by measurement systems designed to satisfy donors. The idea of #ShiftThePower often conflicts with the need for upwards accountability.

This paper summarizes conversations and recommended next steps emerging from these three parallel and intersecting strands of work. The paper is intended to advance ongoing discussions by the people working in the field. Through a process of dissemination, we plan to stimulate further dialogue and take further steps towards building a measurement system as a field. As stated previously, the people who use a measurement system need to feel that it is theirs, rather than something imposed remotely by external agencies.

11   Owen, Harrison (2008). *Open space technology: a user's guide.* San Francisco, Calif: Berrett-Koehler Publishers.

Literature review

Whether they are funding, supporting, implementing, or receiving services, non-profit stakeholders are likely to want to know: (1) what difference a non-profit is making? (2) Who does and who does not benefit from non-profit services? (3) Do non-profits create lasting, or short-term, change? (4) Are there any unintended consequences? While the desire for evaluation is of broad interest, the ability to measure non-profit impact has long challenged non-profit stakeholders as well as scholars of non-profit and development studies.[12] Studies relating to measurement and accountability have uncovered a number of difficulties. This literature review offers a brief introduction to evaluation and social impact measurement followed by a review of the research relating to social impact measurement and its associated challenges. The second half of this review explores literature outside of non-profit studies, which offer valuable insights regarding the pursuit of alternative models of measurement. The final section serves as a caution and reminder as to the limits of measurement and evaluation.

Non-profit evaluation

According to Scriven (1991), evaluation is "the process of determining the merit, worth, or value of something, or the product of that process."[13] The key components required for an evaluation include: the evaluand, which is something you want to measure (e.g. a change, an organization, a programme); a methodology or systematic approach; an assessment based on some criteria; and, a purpose or intended use.[14] The measurement of social impact is not a recent trend. Demands for results and measures of effectiveness date back to the rise of *scientific philanthropy*, when philanthropists, social service providers, and their intermediaries sought to assess the 'worthiness' of clients, measure the effectiveness of programmes, and maximize outcomes while minimizing duplication of effort.[15] This penchant for measurement continued and, by the late 1960s, a modern

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12   Benjamin, Lehn (2010). "Evaluation and Civil Society." International Encyclopedia of Civil Society, Springer US (644–648). Barman, E. (2016). Ebrahim, A. & V.K. Rangan, (2014). "What impact: A framework for Measuring the Scale and Scope of Social Performance." California Management Review, Vol. 56(3): 118–41.

13   Scriven, Michael (1991). *Evaluation Thesaurus*. Newbury Park, CA: Sage p.139).

14   Daehler-Larsen, 2012.

15   Friedman, L. J., & McGarvie, M. D. (Eds.). (2003). *Charity, philanthropy, and civility in American history*. Cambridge University Press. all, P. D. (2001). *"Inventing the Nonprofit Sector" and Other Essays on Philanthropy, Voluntarism, and Nonprofit Organizations*. JHU Press.

evaluation field emerged, largely responding to the rise of New Public Management and the growing number of public-private partnerships to address social needs.[16]

Over time, a variety of evaluation tools and approaches have been designed, all claiming to measure social impact. Some of these tools and approaches set out to standardize and monetize social impact, such as: cost-benefit analysis, cost-effectiveness analysis, social return on investment (SROI), and tools associated with the effective altruism movement.[17] Taking standardization one step further, a number of platforms were created to rate non-profits, using various proxies for effectiveness. Some examples include: Charity Navigator, Charity Watch, GiveWell, Great Nonprofits, Guidestar, ImpactMatters, etc. These platforms attempt to convert social change work into comparable measures, often with the stated goal of identifying or prioritizing programmes that maximize efficiency. Common critiques of such tools include: concerns that uniform measures fail to take into account qualitative differences; that desired outcomes can fall outside of an implementing organization's control; that these measures focus on short-term outputs at the expense of long-term outcomes; that selected measures may be important to some stakeholders but not others; that they emphasize auditing rather than learning; and/or, that such tools neglect issues of power and inequity.[18]

Other measurement tools and approaches have been designed to learn, teach, build capacity, improve services, or tell stories that can empower or inspire. Such approaches typically apply qualitative methods. Some examples include participatory action research, appreciative inquiry, most significant change, constituent voice, outcome harvesting, and more.[19] Another approach applies Nussbaum's (1992) capabilities framework to measure social impact.[20] For example, researchers and practitioners have incorporated some or all of Nussbaum's capabilities into a tailored framework for evaluation to capture the human experience of receiving support, as opposed to conducting a pre-post or cross-sectional outcome measure of a programme.[21] Critics of these more qualitative, user-centred tools and approaches to evaluation cite a lack of efficiency, complexity, or interpretation as some of its limitations.[22]

16 Weiss. 1998.

17 Weiss, 1998; Barman, 2016.

18 Davis, S. (1996). *Philanthropy as a Virtue in Late Antiquity and the Middle Ages*. In J. B. Schneewind (Ed.), Giving: Western Ideas of Philanthropy. Indiana University Press' Sandel, M. J. (2009). *Justice: What's the right thing to do?* (1st ed). Farrar, Straus and Giroux; Stiltner, B. (2016). *Toward Thriving Communities: Virtue Ethics as Social Ethics.* Anselm Academic.

19 Bonbright, D., Campbell, D., & Nguyen, L. (2009). "The 21st Century Potential of Constituency Voice: Opportunities for Reform in the United States Human Services Sector." Public Administration Faculty Scholarship; Campbell, 2002. "Chambers, R. (2014). *Rural development: Putting the last first*. Routledge; Ebrahim, A. (2019). *Measuring Social Change: Performance and Accountability in a Complex World*. Stanford University Press; Vanderplaat, M. (1995). "Beyond Technique: Issues in Evaluating for Empowerment." *Evaluation*, Vol. 1(1): 81–96.

20 Nussbaum, M. C. (1992). "Human Functioning and Social Justice: In Defence of Aristotelian Essentialism." *Political Theory,* Vol. 20(2): 202–246.

21 Cottam, H. (2019). *Radical Help: How We Can Remake the Relationships Between Us and Revolutionise the Welfare State*. Little, Brown; Kato, S.; Ashley, S.R.; and Rasheda L. Weaver (2018). "Insights for Measuring Social Value: Classification of Measures Related to the Capabilities Approach." Voluntas, Vol. 29: 558–573; Weaver, Rasheda L. (2018). "Re-Conceptualizing Social Value: Applying the Capability Approach in Social Enterprise Research." *Journal of Social Entrepreneurship.*

22 Sandel, 2009; Stiltner, 2016.

Next, this paper will explore evaluation difficulties identified by scholars of the non-profit sector. The difficulties addressed here include the following: conflicting worldviews on what constitutes knowledge and evidence; multiple stakeholders with different purposes for conducting evaluations; multiple stakeholders with different values and biases; lack of capacity for evaluation; and, issues pertaining to the use (or misuse) of evaluations.

Challenge: competing worldviews

In analyzing existing social impact measurement tools and approaches, academics have noted the influence of different paradigms. In social science research, there are believed to be four possible paradigms, or philosophical worldviews: (1) positivist – use only rational or objective data to identify cause and effect relationships; (2) transformative – explore politics and power to achieve justice or change; (3) interpretivist – an inductive approach, focusing on subjective experiences and feedback on processes and outcomes; or (4) pragmatic – apply any and all methods available for understanding a problem or practice.[23] Thus, the selection (and evaluation) of a particular measurement tool tends to be influenced by the evaluator's worldview. A number of review articles set out to compare and contrast existing social impact measurement tools and approaches. Some of these review articles compare tools that fit within a specific paradigm while others compare tools representing different paradigms.

Maas and Liket (2010) classifies and categorizes 30 quantitative methods, all allegedly designed to measure impact – either realized or potential.[24] The resulting classification system compares these methods on the following six features: (1) purpose – screening, monitoring, reporting, or evaluation; (2) time frame – prospective, ongoing, or retrospective; (3) orientation – input or output; (4) length of time frame – short or long term; (5) perspective – micro / individual, meso / institution, or macro / society; and (6) approach – process, impact, or monetarization. Based on their analysis, only eight of the 30 quantitative methods in the study were found to measure social impact (BoP impact assessment framework, measuring impact framework, on-going assessment of social impacts, participatory impact assessment, poverty social impact assessment, Robin Hood Foundation's benefit-cost ratio, and social impact assessment).

Offering a more encompassing analysis, Greico, et al (2015) classifies 76 social impact assessment models into four descriptive clusters: (1) simple social quantitative – to calculate social impact created in the past (e.g., Acumen Fund's best alternative charitable option, SROI, expected return, cost-per impact, social footprint, etc.); (2) holistic complex – combining qualitative and quantitative methods to support ongoing monitoring and evaluation of social impact (e.g., global reporting initiative, millennium development goal scan, social accounting audit, balance scorecard, etc.); (3) qualitative screening – using basic qualitative methods to focus on critical and specific issues pertaining to past work (e.g., logic model, provelt, charity analysis

23 Cresswell, J.W. and Cresswell. J. D. (2018). *Research Design: Qualitative, Quantitative, and Mixed Methods Approaches* (5th Edition). SAGE Publications (pp: 5–11).
24 Maas, Karen & Liket, Kellie. (2011). "Social impact measurement: Classification of methods." *Environmental Management Accounting and Supply Chain Management*. Springer, Dordrech, 171–202.

framework, triple bottom line scorecard, social progress index, ongoing assessment of social impact, public value scorecard, etc.); and (4) management – combining qualitative and quantitative measures to assess different types of impact as programmes are implemented (e.g., eco-mapping, EMAS, the B impact rating system, community impact mapping).[25]

Taking a different approach, Ebrahim et al (2010) produced a contingency framework for measuring results.[26] The framework considers an organization's operational strategy as well as its theory of change to provide guidance on what to measure. According to the framework, organizations focused on changing societal norms and policies are recommended to measure outputs and intermediate outcomes; organizations providing basic shelter or relief services are suited to measuring inputs and outputs; organizations providing integrated services can measure outputs, outcomes, and sometimes impacts; and organizations engaged in building ecosystems are recommended to measure both outcomes and impacts. In a more recent publication, Ebrahim (2019) elaborated and refined this contingency framework, providing further guidance regarding performance measurement based on two key factors: (1) the level of control an organization has over the activities and conditions needed to create the desired change; and (2) the level of certainty that exists in regards to cause and effect in addressing a particular social problem.[27]

A further comparison, focusing exclusively on non-profits, compared the existing research on organizational effectiveness. The authors considered the unit of analysis, measures, and domains applied. In their synthesis, Lecy, Schmitz & Swedlund (2011) distinguish among studies that assess the effectiveness of a programme, an organization, a network, or a social movement. Their study identifies four types of measures used to assess non-profit performance: (1) goal attainment measures – progress made towards a stated goal; (2) system resource measures – determinations of organizational strength or survival (i.e., income, longevity); (3) reputation measures – subjective performance measures; (4) and complex models – combining goal attainment, system resource, and/or reputation measures.[28] The authors identify four domains that are commonly used to guide non-profit performance assessments: managerial (survival or growth), programme (efficiency or effectiveness), network (the ability to leverage resources or actors), and legitimacy (recognition or affiliations). While their research confirms previous claims that single measures of effectiveness are insufficient, the authors do not go so far as to recommend a multi-dimensional model nor alternative measures.

This brief summary of articles reviewing social impact measurement tools demonstrates how one's research paradigm can affect the way in which evaluation is understood and the way in which a measurement tool is evaluated. There are on-going, heated debates

25 Grieco, C., Michelini, L., & Iasevoli, G. (2015). "Measuring value creation in social enterprises: A cluster analysis of social impact assessment models." Nonprofit and Voluntary Sector Quarterly, Vol.44(6), 1173–1193.

26 Ebrahim, A. & Rangan, V.K. (2010). "The limits of nonprofit impact: A contingency framework for measuring social performance." Harvard Business School Working Paper 10–099, May 2010.

27 Ebrahim, 2019: 37.

28 Lecy, Jesse D.; Schmitz, Hans Peter; & Haley Swedlund (2012). "Non-Governmental and Not-for-Profit Organizational Effectiveness: A Modern Synthesis." Voluntas, Volume 23: 434–457.

in academia over the most effective, ethically correct, or appropriate paradigm for evaluation research.

Challenge: different (hidden) purposes of evaluation

According to Weiss (1998), evaluations are conducted for overt and/or covert purposes. Most of the time, evaluators focus on the overt purpose, or purposes: to judge (decision-making); to improve (organizational learning); or, to inform (key stakeholders). Yet, there are often covert reasons for conducting an evaluation. For example, an organization may want to delay a decision, avoid responsibility for an unpopular decision, justify an already made decision, improve their image, or cover up a past or expected failure. It is important for key stakeholders to identify and agree upon the purpose(s) of an evaluation.

Understanding the purpose of an evaluation also informs its design. Process evaluations explore what is going on during an intervention while outcome evaluations reflect on what happened after a programme is concluded. In addition, evaluations can be designed to provide information to improve an intervention (formative evaluation) or assess the effectiveness of a programme after it has concluded (summative evaluation).

Challenge: multiple stakeholders with different values and biases

According to Dahler-Larsen (2012), evaluation is both a 'liminal' and 'assisted' form of 'sensemaking.'[29] Which is to say that people rely on their limited knowledge and experience to make decisions about what is, and what is not, to be included in a measurement approach. A number of studies demonstrate how all decisions informing evaluation and measurement are value laden and socially constructed.[30] Critical studies find that research privileges Western methods and often fails to account for systemic barriers that some communities face.[31] For this reason, evaluations must take account of, and become more thoughtful about, who decides what gets measured and how.

Beyond demonstrating how evaluations are socially constructed, an extensive body of literature pertaining to measurement and accountability finds that non-profits focus more resources towards understanding and addressing the needs of donors and government (upwards accountability) compared with resources allocated to the individuals and communities the organization purports to serve (downward

29 Daehler-Larsen, P. (2012).

30 Herman, R. & D. Renz (1999). "Theses on Nonprofit Organizational Effectiveness." Nonprofit and Voluntary Sector Quarterly, Volume 28(2): 107–126. Arvidson, Malin, and Lyon, Fergus (2014). "Social impact measurement and nonprofit organisations: compliance, resistance, and promotion." VOLUNTAS: International Journal of Voluntary and Nonprofit Organizations, Vol. 25(4): 869–886. House, E.R. & Howe, K.R. (2000). "Deliberative Democratic Evaluation." Chapter 5 in Kellaghan & Stufflbeam (Eds.) International Handbook of Educational Evaluation: Dordecht: Kluwer Academic Publishers, Great Britain: 79–100.

31 Thomas, V. G., Madison, A., Rockcliffe, F., DeLaine, K., & Lowe, S. M. (2018). "Racism, Social Programming, and Evaluation: Where Do We Go From Here?" American Journal of Evaluation, Vol. 39(4): 514–526.

accountability).[32] These studies show how dominant stakeholders tend to influence what gets measured, whether consciously or unconsciously.[33] Stakeholder theory, principle-agent theory, or theories relating to power are used to try and explain these results.

Stakeholder theory speaks to balancing the needs of multiple stakeholders while principal agent theory speaks to contract terms between a principal (i.e. a donor) and an agent (i.e. a non-profit) and associated problems.[34] For example, Forbes (1998) notes the potentially ambiguous and conflicting goals across different non-profit stakeholders (clients, staff, partners, consultants, donors, scholars, government, etc);[35] meanwhile, Benjamin (2008) shows how adopting an impact measure of interest to one donor can upset another donor and run counter to a non-profit's mission.[36]

Non-profits are thus faced with aligning and prioritizing divergent stakeholder interests.[37] Such decisions are typically influenced by power dynamics. These value differences and power dynamics are further stressed when working across gender, sexual orientation, race, ethnicity, socio-economic level, caste, religion, nationality, etc.[38] Clearly there are social justice implications when a non-profit makes evaluative decisions, and must consider whether such decisions need to be subjected to critical analysis based on power differentials.[39] Critical race theory, cultural responsive evaluations, and empowerment evaluations, are presented by critical scholars as a way for evaluation to embrace diversity, promote equity and fairness, give voice to the less powerful or marginalized, thwart the misuse of power, and help stakeholders see things from alternative perspectives.[40]

32 Maguire, R. (1981). *Bottom-Up Development in Haiti*. Inter-American Foundation, Rosslyn, VA. Edwards, & Hulme, 1996. O'Dwyer, B. & Unerman, J. (2010). "Enhancing the role of accountability in promoting the rights of beneficiaries of development NGOs." Presentation at Manchester Business School seminar (27 May 2009). Ebrahim, Alnoor (2002). "Information struggles: The role of information in the reproduction of NGO-Funder Relationships." Nonprofit and Voluntary Sector Quarterly, Vol, 31(1): 84–114.; Kissane, Rebecca and Jeff Gingerich. (2004). "Do you See What I See? Nonprofit and Resident Perceptions of Neighborhood Problems." Nonprofit and Voluntary Sector Quarterly, Volume 33(2): 311–333.

33 Nicholls, A. (2009). "'We do good things, don't we?': 'Blended Value Accounting' in social entrepreneurship." *Accounting, Organizations & Society*, Vol.34(6–7): 755–769. Barman, 2016; Ebrahim, A., Battilana, J., & Mair, J. (2014). "The governance of social enterprises: Mission drift and accountability challenges in hybrid organizations." *Research in Organizational Behavior*, Vol.34: 81–100. Luke, B., Barraket, J., Eversole, R. (2013). "Measurement as legitimacy versus legitimacy of measures: Performance evaluation of social enterprise." *Qualitative Research in Accounting and Management*, Vol.10 (3–4); 234–258. Szijarto, B., Milley, P., Svensson, K., & Cousins, J. (2018). "On the evaluation of social innovations and social enterprises: Recognizing and integrating two solitudes in the empirical knowledge base." *Evaluation and Program Planning*, Vol. 66: 20–328.

34 Steinberg, R. (2009). "Principal-Agent Theory and Nonprofit Accountability," Chapter 3.2 in Hopt (Ed.) *Comparative Corporate Governance of Nonprofit Organizations*. Cambridge University Press (pp. 73–126).

35 Forbes, Daniel P. (1998). "Measuring the Unmeasurable: Empirical Studies of Nonprofit Organizational Effectiveness from 1977 to 1997." Nonprofit and Voluntary Sector Quarterly, Volume 27(2): 183–202.

36 Benjamin, 2008. Post, M & J. Dodge (2019). "The Promise of Qualitative and Participatory Approaches to Performance Assessment: A Critical Perspective." Chapter 11 (pp. 138–153) in Eikenberry, Mirabella & Sandberg (Eds.) *Reframing Nonprofit Organizations: Democracy, Inclusion, and Social Change*: Melvin & Leigh, Publishers, Irvine, California.

37 Ebrahim, Battilana & Mair, 2014

38 Molecke, G., & Pinkse, J. (2017). "Accountability for social impact: A bricolage perspective on impact measurement in social enterprises." *Journal of Business Venturing*, Vol.32(5); 550–568.

39 Thomas et al, 2018; Mertens, D. M. (2007a). "Transformative considerations: Inclusion and social justice." *American Journal of Evaluation*, Vol. 28: 86–90. Mertens, D. M. (2007b). "Transformative paradigm mixed methods and social justice." *Journal of Mixed Methods Research*, Vol. 1: 212–225.

40 Thomas et al, 2018; Vanderplaat, 1995.

Challenge: evaluation capacity

Many scholars and practitioners have noted a variety of difficulties linked to the evaluation capacity of non-profit organizations. These studies reveal issues linked to one or more of the following evaluation challenges for non-profits: lack of time; lack of financial resources; lack of skills or knowledge on how to collect, interpret and analyse data; negative past experiences and attitudes toward evaluation; and the exclusion of staff in evaluation processes (i.e. the use of external evaluators).[41]

A lack of time or resources limits the ability of a non-profit to collect and analyze meaningful metrics. As observed by Molecke and Pinkse (2017), "the issue was never that they could not discover the existence of these methods: it was that they often did not have sufficient support and resources to implement them . . . while funders demanded data and reporting, they rarely provided guidance or opinions on what needed to be collected or how to collect it. Funders either felt this was the responsibility of social entrepreneurs or lacked these capabilities themselves."[42] And due to the direct and indirect costs and effort to gather social impact data, many non-profits perceive such activities to be an unwise investment of their limited resources. For example, representatives of smaller, less established non-profits in South Africa reported that they found their monitoring and evaluation requirements to be "a distraction from their real work, confusing, redundant, or destructive" yet they feared sharing such concerns with funders due to the power imbalance.[43]

Challenge: use (misuse) of evaluation

Issues concerning the use of evaluation is another important challenge raised by non-profit practitioners. Meanwhile, academics have identified four different types of evaluation uses. Instrument use is when the results of an evaluation are put into action, for example, it helps with making a decision or solving a problem.[44] Conceptual use is when the results of an evaluation are used to enlighten (or perhaps 'endarken') the way people think about, or understand an issue.[45] The third use is symbolic, which refers to evaluations that are used to mask inaction or reinforce prior beliefs or opinions.[46] The fourth type of use refers to the use of the evaluation process itself. That is, the use

41 Cornwall, A. (2000). "Beneficiary, Consumer, Citizen: Perspectives on Participation for Poverty Reduction." Sida Studies 2, Stockholm, Sweden (p.2); Ebrahim, A. (2003). "Making Sense of Accountability: Conceptual Perspectives for Northern and Southern Nonprofits." Nonprofit Management & Leadership, Vol. 14(20: 191–212; Bornstein, L. (2006). "Systems of Accountability, Webs of Deceit? Monitoring and Evaluation in South African NGOs." *Development*, Vol. 49(2): 52–61. Benjamin, 2010. Kang, J; Anderson, S.G.; & Dan Finnegan (2012). "The evaluation practices of US international NGOs." *Development in Practice*, Vol. 22(3): 317–333. Dahler-Larsen, 2012; Newcomer, K.; El Baradei, L. and Sandra Garcia (2013). "Expectations and Capacity of Performance Measurement in NGOs in the Development Context." Public Administration and Development, Vol. 33(1): 62–79. Carnochan, S.; Samples, M.; Myers, M.; Austin, M. J. (2014). "Performance measurement challenges in nonprofit human service organizations." *Nonprofit and Voluntary Sector Quarterly*, Vol. 43(6): 1014–1032. Campbell, D. A., & Lambright, K. T. (2016). "Program Performance and Multiple Constituency Theory." *Nonprofit and Voluntary Sector Quarterly*, Vol. 45(1): 150–171. Innovation Network (2016). CEP (2016).

42 Molecke & Pinkse, 2017.

43 Bornstein, 2006: pp. 54–55.

44 Weiss, 1998; Rich, R. F. (1977). "Measuring knowledge utilization: Processes and outcomes." *Knowledge and Policy*, Vol. 10: 11–24.

45 Ibid.

46 Weiss, 1998; Knorr, K. D. (1977). "Policymakers' use of social science knowledge: symbolic or instrumental?" in C. Weiss (Ed.), *Using social research in public policy making* (pp. 165–182). Lexington, MA: D. C. Health.

of evaluation to change participant thinking or behaviour as a result of learning during an evaluation.[47] Researchers find that the instrumental use of evaluation is rare while symbolic use is more common.[48]

With regards to the misuses of evaluation, one might consider Campbell's Law: "The more any quantitative social indicator is used for social decision-making, the more subject it will be to corruption pressures and the more apt it will be to distort and corrupt the social processes it is intended to monitor." Or, Goodhart's Law: "When a measure becomes a target, it ceases to be a good measure."[49]

Past (mis)uses of evaluation have led some non-profits to believe that any data that might be collected is likely to be insufficient and perhaps unreliable.[50] There are concerns about metrics that focus on short-term results, are stripped of emotional information, over- or under-estimate the importance of various factors, do not account for the counterfactual, or ignore power dynamics and the complexity of social impact work.[51] Moreover, some non-profits are concerned with how beneficiaries might be adversely affected by evaluation procedures or the use of evaluation findings.[52]

Towards a new model of measurement

We need a new way of thinking about measurement. The topic of measurement is vital to the success of the field of philanthropy because of the old adage that 'what gets measured gets done.' Such a view is confirmed by *They go 'round and 'round*, a 2008 article by Barry Knight and Caroline Hartnell who looked at trends in philanthropy and development since the Second World War, and found that terms like 'community' and 'civil society' go in and out of fashion. Although the idea of civil society emerged triumphant from the 1989 revolutions in Central and Eastern Europe, enthusiasm for the idea waned ten years later, which some attributed to challenges with measurement:

> *"At the turn of the millennium, this new optimism [for civil society] started to fade. It was not clear what civil society was delivering, and a number of key funders pulled back from it. One of these was Atlantic Philanthropies, which, following a decision to spend down its endowment in a period of 12–15 years, decided to focus its grantmaking in just four highly focused and 'strategic' programmes where it was felt it could have maximum impact and achieve a visible 'legacy.' A series of books and articles drew attention to the woolliness of civil society and the difficulty of harnessing it to develop a funding strategy to deliver measurable outcomes."*

47 Alkin, Marvin C. and Jean A. King (2017). "Definitions of Evaluation Use and Misuse, Evaluation Influence, and Factors Affecting Use." American Journal of Evaluation, Volume 38(3): 434–450.

48 Ibid.

49 Miller, Mauricio L. (2017). *The Alternative: Most of What You Believe About Poverty Is Wrong*. Lulu.com. Schachter, H.L. (2010). "Objective and Subjective Performance Measures: A Note on Terminology." Administration & Society, Volume 42(5): 550–567. Benjamin, 2008.

50 Molecke & Pinkse, 2017.

51 Ibid; Ebrahim & Rangan, 2014; Luke, et al 2013; Barraket, Jo & Yousefpour, N. (2013). "Evaluation and social impact measurement amongst small to medium social enterprises: Process, purpose and value." *Australian Journal of Public Administration*, Vol. 72(4): 447–458.

52 Molecke & Pinkse, 2017.

The current zeitgeist for change in philanthropy and development has arrived in the form of the #ShiftThePower movement. If this movement is not to suffer the same fate as efforts to reinvigorate 'community development' in the 1960s and 70s and civil society in the 1980s and 90s, it is vital we become specific about what #ShiftThePower means in practice, and how to measure the results of these efforts. The job is therefore to find new ways of measuring that fit the variety of development situations and the complexity that people in civil society are concerned with.

Two paradigms of measurement

To do this, we have to go back to the basics, which requires delving into the fields of ontology and epistemology. We cannot do justice to these topics here but those who are interested in a good introduction should consult *The Passion of the Western Mind*, by Richard Tarnas.[53] The book, which offers a lucid account of ideas and thinkers that shaped our world, concludes on a sceptical note, suggesting that postmodern thinking, with its thorough-going relativism, has left us rudderless in a world we don't understand:

The search for truth has failed us. As biologist J.B.S. Haldane has put it: "Now my own suspicion is that the Universe is not only queerer than we suppose, but queerer than we *can* suppose."[54] Perhaps, we have been looking in the wrong place and in the wrong way. To lift ourselves from the paralysis of uncertainty, we might turn to physicists. Revolutions in 20th Century physics produced an upsurge of philosophical literature informed by the theory of relativity and quantum mechanics. Physicists help us challenge the stereotypes about how science works and question standing paradigms of knowledge. Old certainties have faded as physicists wrestle with the idea that theoretical physics and Eastern mysticism have much in common.[55]

The stereotype that scientific knowledge is objective and rigorous, while mystical insight is subjective and dreamy no longer holds. One of the most significant physicists of the 20th century, David Bohn, wrote about the implications of the new physics for measuring social phenomena in his book *Wholeness and the implicate order*.[56] In his book, Bohm identifies two contrasting paradigms of measurement.[57] The first is based on the principle of 'inner harmony'; the second is based on the principle of 'external standard.'

Measurement based on *inner harmony* suggests 'everything being in its rightful place.' Being aware of the inner measure of things will bring about orderly action and harmonious living. Consider, for example, the importance of Aristotle's 'Golden Mean', and its associations with right proportion in the aesthetics of music and visual arts. Similarly, speaking of human affairs, Aristotle uses this measure to guide individuals

53 Tarnas, R. (1991) *The Passion of the Western Mind: Understanding the Ideas that have shaped out world view*, New York: Random House

54 Haldane, J.B.S (1927) Possible Worlds and Other Essays, London: Chatto and Windus, p. 286.

55 In *The Tao of Physics*, Fritjof Capra describes the parallels between modern discoveries in physics and Eastern mysticism.

56 Bohm, D. (1980) Wholeness and the implicate order, New York: Routledge

57 Pages 19–26.

in search of inner harmony when he explains that: "Virtue is the golden mean between two vices, the one of excess and the other of deficiency."

Central to this idea of seeking inner harmony is the concept of ratios. Bohm quotes Newton: "As the apple falls, so does the moon and so does everything," which indicates the connectedness of all things. Thus, in measuring the universal proportion or relationship, we use a ratio. And the Golden Mean, also called the Golden Ratio, is one ratio that stands out above all others. Related to the Fibonacci sequence, the Golden Ratio is an 'irrational number' found by dividing a line into two parts so that the longer part divided by the smaller part is also equal to the whole length divided by the longer part. It is often symbolized using phi (Φ), after the 21st letter of the Greek alphabet. In equation form, it looks like this:

$a/b = (a+b)/a = 1.6180339887498948420 \ldots$ [58]

And visually, it looks like this:
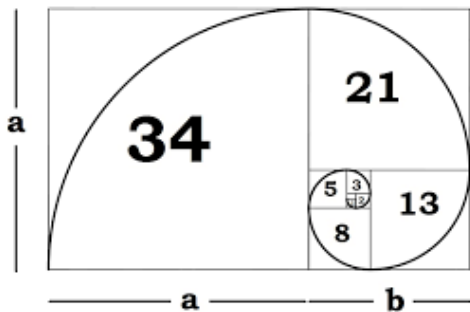
This Golden Ratio is found everywhere in nature: in flower petals, pinecones, tree branches, human anatomy, in DNA, spiral galaxies, land mass and hurricanes. It is also used extensively in art, music and design.

Over time, Bohm suggests that the measure of 'inner harmony' was replaced by a second paradigm of measurement. This new paradigm involves seeing measures developed from the outside based not on harmony between energy flows but on the assessment of separate material objects. An example of such separation is the logic model of evaluation, which identifies different components: inputs, processes, outputs, and outcomes. Bohm attributes this change in emphasis to the tendency for measurement to become more routinized and habitual in the way that outward signs of inner harmony are used as

58 For more about the mathematics of this, see https://www.mathsisfun.com/numbers/golden-ratio.html

key indicators of progress. Such a process, when applied mechanically, tends to lose nuance and subtlety. Eventually, the external measures lose touch with the importance of inner harmony. Meaning is then lost, and external measures become mistaken for the underlying inner reality.

Such loss of meaning acts as a warning about systems of evaluation that assume an arrogance that epistemology does not justify. There is perhaps no better illustration of this problem than the use of gross domestic product (GDP) as an indicator of growth. In a New York Times article, "Redefining the meaning of no. 1", David J. Rothkopf points out that GDP is "so deeply flawed as to be irrelevant or worse . . ." Rothkopf cites the inventor of GDP, Simon Kuznets who warned: "The welfare of a nation can, therefore, scarcely be inferred from a measurement of national income." Yet, Rothkopf emphasizes, "That hasn't stopped us from making this misleading number perhaps the most influential statistic in the world."[59]

Accepting the limits of measurement

What this brief detour into epistemology teaches us is that all measurement systems are heuristic devices that can only work within certain limits. So, although we may wish to keep the scientific spirit, we should not be hemmed in by giving priority to methodologies that are too narrow to unravel the complexity of the universe. We must identify ways to marry art and science, and incorporate intuition, observation, reason, and creativity in our language and our work. In *Cosmos and Psyche*, Richard Tarnas sets out how to approach this task.

> "Humanity's 'progress of knowledge' and the 'evolution of consciousness' have too often been characterized as if our task were simply to ascend a very tall cognitive ladder with graded hierarchical steps that represent successive developmental stages in which we solve increasingly challenging mental riddles, like advanced problems in a graduate exam in biochemistry or logic. But to understand life and the cosmos better, perhaps we are required to transform not only our minds but our hearts. For the whole being, body and soul, mind and spirit, is implicated. Perhaps we must go not only high and far but down and deep. Our world view and cosmology, which defines the context for everything else, is profoundly affected by the degree to which all our faculties – intellectual, imaginative, aesthetic, moral, emotional, somatic, spiritual, relational – enter the process of knowing. How we approach 'the other', and how we approach each other, will shape everything, including our own evolving self and the cosmos in which we participate." [60]

It follows that we can have a scientific understanding of philanthropy and development so long as we take account of the evidence from epistemology. And the evidence from epistemology calls for multiple methods to understand complex phenomena.

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59 Rothkopf, D. (2011) Refining the meaning of no. 1, New York Times, 11 October. Available from: https://www.nytimes.com/2011/10/09/opinion/sunday/gdp-doesnt-measure-happiness.html

60 Richard Tarnas (2006) *Cosmos and Psyche: Intimations of a New World* View, New York: Viking Press, p.487.

The frequently cited 'hierarchy of evidence' is badly out of date. A key word is 'harmony', but this is a rarely used word among professional evaluators. This has to change.

Rather than seeking 'objective detachment' we must embrace 'disciplined subjectivity.' This does not mean we cannot use the tools of mathematics. Rather, we must learn to harness their power as part of a people-based enquiry. As anthropologist Tim Ingold puts it: "All study calls for observation, but in anthropology we observe not by objectifying others but by paying attention to them, watching what they do and listening to what they say. We study *with* people, rather than making studies *of* them."

Still, observing *with* people still presents problems of power, including decisions over what is important to measure, whose voices matter, and ownership of the resulting data. Critical theory (e.g. race theory, feminist theory, post-colonial theory) requires that any research acknowledge power and take steps to minimize power dynamics. In their introduction to critical methods and indigenous inquiry, Denzin and Lincoln (2008) offer the following criteria for critical and indigenous research:

> *"It must be ethical, performative, healing, transformative, decolonizing, participatory. It must be committed to dialogue, community, self-determination, and cultural autonomy. It must meet people's perceived needs. It must resist efforts to confine inquiry to a single paradigm or interpretive strategy. It must be unruly, disruptive, critical, and dedicated to the goal of justice and equity."* [61]

Grassroots movements bubbling below the surface are hard to measure. They act a bit like Mycelium, a fungus network that grows under the surface of the Earth and is vital to our ecosystem. What we eat is the fruit of mycelium. Questions that arise are 'What is the current relationship with nature that creates imbalance and disharmony?' and 'Is there a way to measure this?' Thus, measurement is about finding harmony with your environment. It runs counter to the conventional wisdom of the measurement industry, which has lost connection with nature. People in civil society are driven by processes that are not mechanical but inclusive and organic. They are in search of harmony between people and nature.

In sum, devising an evaluation system is a task that must be approached with humility and caution. Its point is not to convey 'truth' but to give more insight than we currently have. Any evaluation needs to have a normative and practical purpose that advances the field it is measuring. The test of its value should perhaps be: 'Is it good enough to produce data so that people can judge the sense of inner harmony in the world that they inhabit?' The indicators used to make that judgement cannot be prescribed from the outside, though people on the inside can share the kind of indicators they believe work in one context to see if they might work in others. This approach shifts the power in evaluation to where it belongs – with the people who are intimately involved with what happens.

61 Denzin, N. & Lincoln, Y. (2008). "Introduction: Critical methodologies and indigenous inquiry." In N. Denzin, Y. Lincoln, & L.T. Smith (Eds.), *Handbook of critical and indigenous methodologies*. Los Angeles, CA: Sage.

Findings

In this section, we bring together findings from the three work streams. We begin by acknowledging the high level of motivation to measure and the difficulties experienced with measurement. We compare what the field wants from an evaluation system with what donors request. We investigate what a new system of measurement might look like, taking account of indicators and approaches practitioners are already exploring, such as the GFCF's effort to build the assets, capacities, and trust framework. We also address what it would take to develop a new system and what support the field would need to implement it.

It must be stated that the idea of measurement is often conflated with the tool or technique used for measurement. Although related, these two concepts should be kept separate. Measurement is the solution we seek; the tool is the method by which we seek it. Some parts of the evaluation industry market their tool as 'the solution to the problem of measurement', whereas in fact any tool will be good for some things but not for others.

Motivation to measure

A factor that came across in all of the consultations is that there is a high level of motivation to measure. Participants said that measurement is important because they want to find out what changes as a result of their interventions. Many want to go deep and look beyond material indicators of progress, such as number of roads, volume of production, or changes in income levels. They want to understand how people feel as a result of their work. They want to track changes in attitudes and behaviours that often form the basis of structural injustices and biases in society, often serving as the root causes of conflicts, violence, and the systemic marginalization of certain groups. Let us take some examples.

A local grantmaker from India supporting a livelihood project with marginalized women working on mushroom cultivation is not interested in measuring quantities or increase in profits. Instead, as they put it: "We want to look at the change in attitudes and behaviour in the women and return on investment in terms of economic independence." Similarly, a grantmaker that supports community-based social and environmental justice projects wants to find out what has changed on the ground from the lens of their theory of change, which involves a commitment to movement building for environmental and social justice.

They do this by giving small grants to activists and community-based organizations that are tackling the problems affecting their communities. Based on this theory of change, they want to learn what constitutes a grassroots movement and how they can contribute to building it:

> *"We ask our grantee partners to report annually against the indicators but in a way that's framed quite accessibly. We really don't want to impose bureaucracy and reporting duties on our partners. Instead we ask questions around how people's lives have changed, how their attitudes have changed, how the natural environment has changed, how their capacity to influence has changed, and we as staff then translate that into the indicators."*

Experience with measurement

In meetings led by Candid, participants were asked 'how do you manage knowledge?' Answers to this question refuted the stereotype that community philanthropy organizations are poor at measuring their work. Most organizations have some kind of knowledge management system and keep track of what they are doing. Although many systems did not extend beyond an Excel spreadsheet, there is a body of practice that can be built on. At the meeting in Brazil, Jenny Hodgson, Executive Director of the GFCF said:

> *"For the last year, we've been running a learning group with 15 partners from around the world on measurement in community philanthropy. Turns out everyone working in this space has 'secret excel sheets' that capture more complex things (not just outputs and dollars) – so what's on your secret excel sheet? Our logical selves are connecting into a system that does not work and we need to tap into our creative brains. How can we create 'pots' of indicators that measure similar things? Around the world people feel they are not heard or seen, but how can we capture what's at the edges?"*

One organization, focusing specifically on children and youth, uses a combination of outcome harvesting and Vital Signs.[62] Having developed a theory of change, outcome indicators were developed for three related target groups (government, non-profits and corporate donors). The process has allowed disconnected actions to seem like a comprehensive overarching strategy, with the ability to look at connections between macro indicators and micro actions. As the director of this organization commented:

> *"If you're not bound by time or working on just one single issue (which community philanthropy isn't), then this is very powerful. The advantage of outcome harvesting is that it is giving you results in real time, allowing you to celebrate when you have successes along a journey, not just waiting for the outcomes of a process to happen. It also allows you to see the failures along*

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62 Outcome harvesting refers to an evaluation process, which involves gathering evidence of change and, with respect to interventions, looks backwards to explore how related activities may have contributed to that change (see Wilson-Grau, R. (2019). *Outcome harvesting: principles, steps, and evaluation applications*. Information Age Publishing, Inc.). Vital Signs refers to a tool that is used by community foundations in different parts of the world to identify and monitor needs in a community (e.g., https://cfka.org/vitalsigns/).

the way, and to readjust if necessary. You don't just keep on implementing and then look back and wonder what happened – evaluate as you go."

Another organization identifies and supports local initiatives from civil society that both have environmental protection at their core and potential for local income generation. The main goal of the programme is to mobilize local resources. Over seven years, the organization has monitored its results and found some good ones. It has influenced the law governing social enterprises and opened new lines of communication with local and central governments, as well as supporting new social enterprises.

A third organization sees building trust as an end in itself, though it recognizes that increased trust leads to other outcomes. When communities give, it's a strong indicator that they trust whoever they are giving their resources to. Giving is therefore a measurement of trust. So is participation, particularly among marginalized groups. The work involves changing mindsets, mapping development through stages of resistance and confusion to resource mobilization, so that people see their actions as part of an important process. The outcomes are seen, not in terms of 'poverty reduction', but rather in terms of 'livelihood development.' Accountability is horizontal – assessment is done 'with partners' not 'over grantees.'

A fourth organization is embarking on a pilot around local philanthropy. Having mapped local communities to understand cohesion, who is connected to whom, the organization sees its role as strengthening communities. When these communities are strengthened, local philanthropy emerges. There will need to be shifts in mindset away from just thinking about improvement at a household level towards the greater good. The organization may not be able to measure changes in values, but can evaluate an increase in cooperative values, which would be a measurement of values shifting. This organization has picked three specific indicators to track, but that doesn't mean other indicators will be ignored. Improved gender equality and poverty reduction are outcomes of strengthened communities.

A fifth organization measures its impact by recording the life of young people who participated in the programme from the beginning, who are now in leadership roles, internally and externally. They measure the effects on income levels of participating families. In addition, they use the Human Development Index to measure changes in the territory and are developing a smart phone app to share project data, which will increase transparency.

Another organization, a community philanthropy support organization, has 16 organizations in its membership. This organization does its own data collection, which includes consolidating data from members:

> *"Two organizations are using Vital Signs. We use Google Drive to share across foundations (contract models, guides, research). Some of our members use Salesforce. The main challenge is the international span of the foundations, we are trying to learn more from experience rather than this pool of information we are gathering nationally."*

Another organization posts its fundraising stories and proposals online. You can donate to individuals and NGOs online and track the progress of a campaign online. The organization collects data on what was donated to what project, what problems were experienced, and how to avoid those problems in the future. There is a similar internal system for managing documents, proposals, budgets, agreements, and notes of progress.

It was clear that everyone had experience with measurement in their work. Nearly all participants stressed the importance of stories or case studies in their evaluation approaches. Stories deepen their understanding of how people feel about changes coming into their lives in a way that numerical scores cannot. Most said they use a combination of quantitative data and stories to build an overall picture, as noted above.

Sometimes, participants said they proactively seek out feedback from the most vulnerable, whose voices are normally silent or silenced:

> "We make sure that the voices we hear are not just of the leader activist. We also seek out ethnic minorities who are being marginalized even further because of the dominant forces in an ethnic conflict, women's voices, young voices and so forth."

It was agreed that measurement is centrally important yet difficult in local contexts where the issues that matter to local people are hard to capture easily. The idea of #ShiftThePower often conflicts with the need for upwards accountability. Most people had developed systems that met some of their needs, though would like to improve them, both in the field of community philanthropy and how it applies in the local contexts.

Difficulties with measurement

While the motivation to measure may be high, organizations face hurdles when it comes to doing so. Three main barriers relate to capacity (lack of time and/or resources to measure), capability (lack of skills or knowledge to measure well), and – increasingly – the problem of security. We will take each of these barriers in turn.

In regard to capacity, community philanthropy organizations are comparatively small and often resource scarce, which means there is little budget allocated for measurement. Here is a selection of such comments:

> "We are a very **small** organization **dependent on volunteers**."

> "We are mindful of the **amount of time** that these things take and the **pressure** we are all under from many different angles."

> "Knowledge management: how is it possible when you need to constantly raise money from so many donors (dozens of events each year)? All that we've learned and the knowledge we have is incredibly valuable for the field. We have that learning, but **how do you have the resources to extract this knowledge and or disseminate it**? How can you get the human resources?"

*"We'd like to give people/donors an account of what we do, but the local community members see this as **a burden** rather than helpful."*

*"We have so much data about grant applications etc. but **we just sit on it**."*

*"What we'd like to measure is the sustainability of the change. Has the change really stood the test of time? We'd ideally like to go back five to ten years later to see how the particular project or change has lasted but **there are constraints there concerning time and funding**."*

Turning to capability, most organizations are composed of activists who are passionate about making changes in their communities but often lack training in skills associated with measurement. For example, one support organization described its struggle to frame a collective narrative:

"There is no clear collective narrative about the field, but we are working on it. Some groupings of organizations by causes and geographies but it's a top priority to get to a place where the organizations speak in a shared narrative."

Another organization, working in Central and Eastern Europe, felt that its work had made a difference, but it lacked a formal method to record this change:

"Think tanks, grassroots, investigative journalists make up 'the triangle of change' in [our country]. There is a coalition of actors working together for social change, democracy, transparency, and we are part of that. What is the overall outcome? Stronger communities. But it is difficult to tell the story of 20 years of work."

A community philanthropy support organization noted: "The most common question we are asked is how do we manage our knowledge better?" A local project asked: "We've been managing and collecting data but how do you put it together?" And, in Russia, one contributor noted:

". . . before we never measured trust, or even verbalized it. It's a very different story that needs to be measured. We can measure resources and communication but such things that are more like an image or quality, how do you measure how a foundation is different from another? A different type of relationship, trust formed on basis of foundation activity. Often times we can't answer questions of difference between an educational fund and a community foundation."

The third barrier highlighted was security. With the rise in 'closing space' for civil society around the world, where governments are feeling threatened by community groups working for social justice and change, security has become more of an issue. This affects the transparency of organizations, since they may need to protect themselves and the people they are funding. In the Brazil meeting, for example, one person shared:

> *"We are concerned with data collection processes that exist currently. We are concerned with the security of leaders. People are followed and stopped, and we need to be careful with that and be aware of the danger. We need to tell when someone feels threatened or is being followed – we need to protect them. But the person needs to know they can talk to us and come to us."*

Measurement mismatch

All three strands reveal a crisis at the heart of measurement: a mismatch between what happens on the ground in civil society development and what donors want. Donors tend to be obsessed with measurable targets – often of questionable importance – that fit a simple linear model of measurement (e.g. tracing inputs to outputs in a way that claims a scientific approach to validating programme design). Many participants expressed concern with linear measurement models, invoking Donald Campbell's Law: *"The more any quantitative social indicator is used for social decision-making, the more subject it will be to corruption pressures and the more apt it will be to distort and corrupt the social processes it is intended to monitor."*

Practitioners working in the field, on the other hand, see themselves as working in complex ecosystems where thinking in linear models would seem inappropriate or even harmful. For example, a peacebuilding organization collaborates with many stakeholders and a single bad incident sparked by any one of them can create a big setback. These groups are in search of a process-driven approach to measurement that offers more nuanced ways of detecting outcomes. Below are representative comments from community philanthropy organizations about the mismatch of expectations:

> *"We have one donor who is just after hard-core outcomes, how many roads and wells, etc. Now we are in the process of educating them and others and saying that there is a whole lot more to the process of social change. There is a gap between what we see as value and what they see as value."*

> *"The biggest challenge for us is donors asking for numbers as a measure of social change. This is a gap between funders and grassroots work."*

> *"There is a push from our donors to measure quantity. But we deliver a quality service, and it's more about listening than money. 'Too invisible', say our donors."*

> *"I'd say donors in France have been too obsessed by numbers and impact. In our sector evaluation has to be qualitative."*

> *"Often funders ask for metrics that don't make sense in our context and are not built with a community. This is often more of a hindrance than help. Community members often react negatively to this."*

At the Nepal retreat, a group of organizations talked about measurement and concurred that there is a gulf between what funders want from measurement and what civil society offers. They quoted from *The Little Prince* by Antoine de Saint-Exupéry:

> *"Grown-ups like numbers. When you tell them about a new friend, they never ask questions about what really matters. They never ask: 'What does his voice sound like?' 'What games does he like best?' 'Does he collect butterflies?' They ask: 'How old is he?' 'How many brothers does he have?' 'How much does he weigh?' 'How much money does he have?' Only then do they think they know him."*

The situation is sometimes difficult for donors too. One staff member of a private philanthropy noted that he felt removed from the work he was funding: "We struggle; the further we are away from the field the more we struggle." This person added that the short-term orientation of funders makes it difficult to reconcile with the goals for making long-term improvements:

> *"Donors are schizophrenic about wanting to affect long-term change, but they don't work in long-term frameworks. There's a tension between the tangible and intangible, donors are more focused on the quantifiable tangible measures."*

At the Symposium, one person from a support organization noted that it was difficult for donors to understand the nature of local work:

> *"There is a need for donor education in all of this. People can't understand all the different environments that they are funding. It is important to give weight to views of people on the ground. Not just through Western eyes. Educated people giving grants to people who are uneducated. There is a sense that our system is inherently superior because they are based on Western norms. Instead, we must adopt an attitude of humility – not to imagine that people must adapt to produce our outputs. We must listen to people on the ground. There must be respect for differences. I don't see a lot of that in the funding world."*

At the same time, funders say they too face a hard job trying to assess the value of what they fund. One organization in Latin America, which funded 600 projects in the past 25 years, described its experience assessing the project they funded:

> *"The cost of monitoring is very high because we serve a huge geographic area . . . How do you do this and visit the projects? You need multiple days to visit each project. They are distributed and scattered around. Sometimes, we feel like we are dropping a droplet in the ocean. Of course, it has an impact at local level, but I've seen that it's very challenging to collect quality data. Basic indicators like income generation. If you've seen agriculture projects, they have no idea how much they've spent or made. How can I do a before and*

after? They don't know. Some indicators we have are complex, like carbon economy. What if they don't even know how much fertilizer they've even used and work in small areas with native plants. The carbon methodologies are designed for squares, but they work in the hills. You need to hire a consultancy to measure the carbon emission of these complex projects. What about gender? Funders don't understand the costs of measuring gender. We have two people but need six people to visit one project. We feel like a drop in the ocean, but we know that the results of our work are about collecting experiences and how can we translate this into policy? We need laws that are more flexible to register community-based initiatives. Why the same documentation needs for a big corporation and a small community organization. We need advocacy for different public policies."

There is impressive consistency in our finding that this mismatch over measurement breeds high levels of frustration in the field. Organizations working in the field feel that logic models do not capture what is important about their work and that they are judged by the wrong standards. These groups offer complex and nuanced stories about the impact of their work, having collected a wide variety of information and evidence to inform these stories often without even realizing they were doing so or what they mean for the field. As one person from a community philanthropy organization put it: "How can we collectively tell and share these stories to show the value of community philanthropy?"

Alongside this frustration, there is a still more serious issue. The measurement mismatch leads to a dysfunctional sector. Mary Ann Clements of the *Healing Solidarity Collective* draws our attention to two deleterious consequences. The first is that grassroots initiatives are starved of resources by the very institutions established to work towards a better world. The second is that many people working in development experience a value rift between what they are committed to and the climate in which they work. At best, practitioners are forced to allocate much of their time to the bureaucracy of aid. At worst, the environment they work in is toxic. From the perspective of systems theory[63], the emergent part of the field, which is developing from the bottom-up, is starved of resources; meanwhile the designed part, which is working from the top-down, is desperately unhappy. This is a recipe for failure. As Mary Ann Clements puts it:

"Buried in the development sector as it currently exists are many, many, frustrated people with very little time to think, whose days are consumed by log frames and budget details and who currently have very little time to be in the practice of building the relationships and actions that will enable us to do things differently." **The consequences are that:** *"The great majority of us are exhausted, staring at never ending to-do-lists, staying busy with the tasks in hand rather than taking time and space to think a new paradigm into being."*

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63 https://medium.com/age-of-awareness/emergence-and-design-2a295069375f

Unit of measurement

What is the appropriate unit of measurement (organization or field) and geographic boundary (local, national, international)? In meetings held in Russia and Brazil, this issue was discussed extensively. A consensus emerged that measurement should focus on both (1) measurement of the organization's performance at the local level; and (2) measurement of the field's performance at the country level.

At the local level, issues faced by an organization will be different from one another, thus indicators must be chosen to suit the local context. There is no sense in comparing one organization with another to see which is 'best', since organizations are at different stages of development, and this is not a competition. What particularly matters is what can be learned from the measurement of local performance to improve future performance.

At the country level, there is a joined-up narrative to be told. For example, the 70 community foundations in Russia are pioneering a new way of doing development and the collective experience is worthy of capture and lifting up as an example to the rest of the world. More mature organizations are helping newer ones, building alliances and offering peer group support. As one person put it at the meeting in Russia:

> "We are hoping to consolidate knowledge and tell a joint story and if we can tell a joint story we will be more powerful. For example, a population in one region does not have anything to do with work of a foundation in another region. Telling the story is important on a federal and global level. When we work in regions, general estimations should not influence your specific work in your territory, there is no contradiction between the two."

Another person stated:

> "Over the next two days we will be focused on philanthropy in rural Russia, including about results and effectiveness. It has to be our own initiative to set goals. We need general approaches to create an enabling environment, but that's not related to our practical work and results as organizations. Strategic focus on results in the territory are needed and what we need to do all together and what we as individual organizations want to do, are out of balance. Certain initiatives at the federal level work against our global goals. It would be interesting for us to understand if we have this situation because of the size of the country. Even when preparing projects, federal and regional level understanding of the work differ."

In Brazil, where there is a vibrant field and variety of philanthropy and development organizations, an important narrative is emerging. There is a desire to foster local models and measures and limit foreign influence on these models and measures. At the Brazilian meeting, one person noted:

"We need to abandon the 'box' of community philanthropy. Let's not just think about these imposed models. We need to recognize what already exists in the Brazilian context. We have many types of organizations and types of work and no need to emulate the American model. How do we decolonize what we have in Brazil? Many were created by American organizations. We need to think beyond this and develop the Brazilian way."

Another added:

"I'd like to ask what's the purpose of having measurement? We've been discussing it and we know there's much good being done but it's not well shared. It's still small considering the magnitude of our problems. We need to scale what we do and to achieve scale we must add more initiatives to our organizations and bring more people to this field. We must help more people recognize themselves as part of community philanthropy. To resist what's out there, we need a field that recognizes itself as a diverse field able to work on several things at the same time. A field like this will be empowered and able to expand the impact of the work. My provocation to you is to think about measurement but also about the purpose of measurement, including the results of our field collectively to help build the field. We are all here because working as a collective makes all the sense. We need to see ourselves as members of our field. If we measure our collective results, we'll see our commonalities, not just seeing ourselves individually and measure that."

Imagining alternative systems

In devising the specifics of a measurement system, what local people want and need should always trump an externally imposed indicator set devised from offices in Washington or London. Rather than using a Western model of progress, what counts is what is meaningful for people. During the various meetings and webinars participants had opportunities to envision alternative systems of measurement.
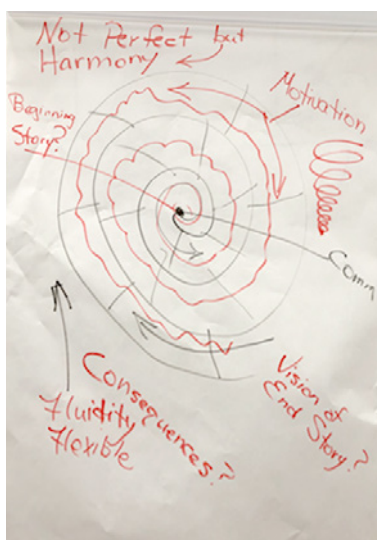
As part of a creative exercise in Mexico, participants were invited to map out their ideas visually. We will take two examples of the creative work that was produced. One group produced a spiral diagram, depicting the meeting point between traditional philanthropy and community philanthropy somewhere on this spiral. It is important, they said, to focus on the centre of the spiral, because if we aren't centred ourselves (as individuals and organizations), none of this will work. This led to the question of isolated communities, which are not 'centred.' How to reach them? How to approach them? How does that community receive you

and your interest, as an outsider? What are challenges to get that community out of whatever problem they're in?

This group stressed the importance of being respectful of nature. When comparing communities to nature, we should think about consequences. We need to listen to the stories coming from communities, and encourage personal motivation – to participate, contribute, etc. A good way to assess how things are going in communities is to talk to people personally engaged.
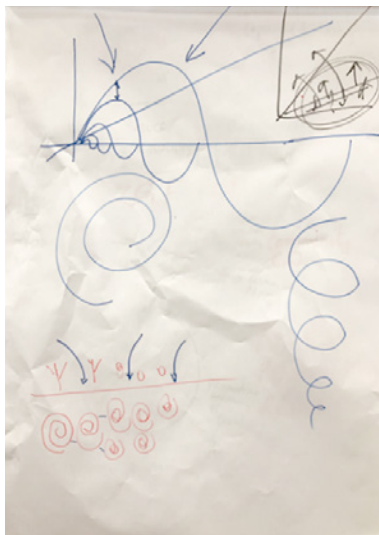
The second group presented a graph of changes over time that looks remarkably like the Golden Ratio. The group explained that the universe is in constant fluctuation and movement. Perhaps resilience is the ability to return to the original state. As we adapt to change, we are constantly finding new balance and equilibrium.

Later, at the November 2019 PSJP retreat in Nepal, participants worked in groups to devise how they viewed 'a good society.' Four groups came up with different framings, but the commonalities among those framings far outweighed the differences. The word cloud below reveals visions of a good society that focus on 'the enrichment of human capacity' in contrast to current models which 'do not focus on human happiness but are dominated by scale and economic growth.' This concurs with a range of studies of UK citizens conducted by the Webb Memorial Trust, which showed that, while political leaders and elites favour the pursuit of wealth as an indicator of progress, local people are more interested in measuring well-being.[64]

In thinking about how to turn these goals into a suitable measurement system, one contributor to a GFCF webinar stated:

64 Knight, B. (2017). *Rethinking poverty: what makes a good society*, Bristol University: Policy Press

"We need to a find way to track the progress we are making, because a lot of work we do in communities requires this big mindset shift because [people] are used to handouts and traditional aid. When you come in with the narrative of telling people you have resources in your community and how can you use them to develop the community, the onus is on us to be able to show some progress. We need to really think through that."

Getting specific about indicators

In a review of academic- and practice-based literature on community philanthropy, Dana Doan produced a list of goals and indicators of progress described in this literature.[65] The group that met in Mexico in July 2019 were presented with this list and asked to rate these goals and indicators according to whether they were (a) essential or (b) desirable. Participants were invited to put a red dot on a chart if they were essential, a green dot if they were desirable, and to place no dot if neither of these. Results are shown on the following two charts. The first chart compares responses to the list of cited goals.
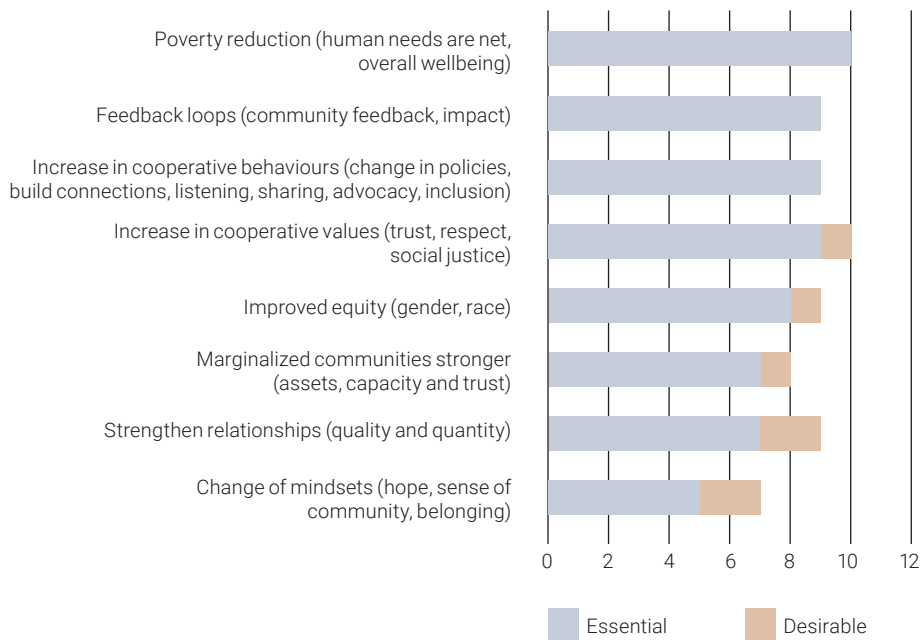
Ratings of importance of goals of community philanthropy
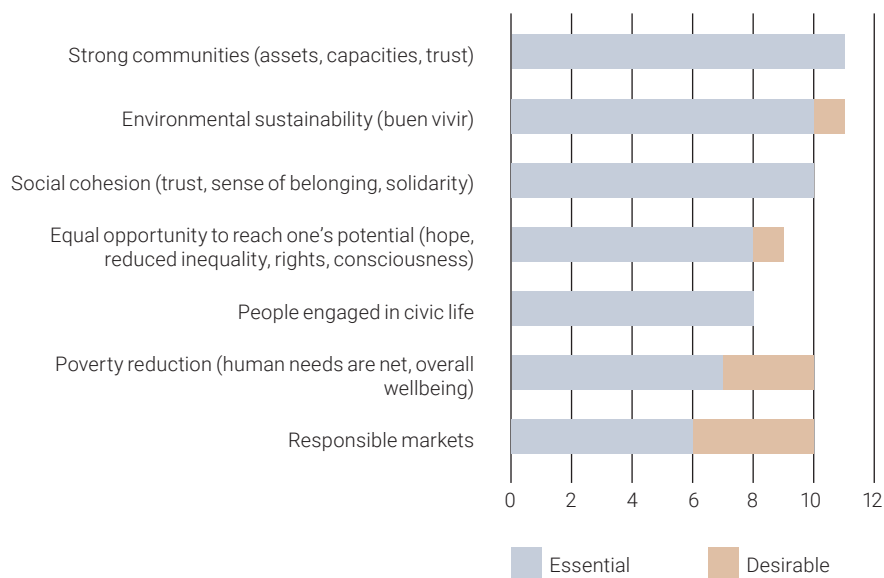
The second chart compares the same group's assessment of the importance of cited measures.

65 Doan, Dana R.H. (2019). "What is Community Philanthropy?" Global Fund for Community Foundations.

Ratings of importance of measures of community philanthropy

	Essential	Desirable

In considering these goals and indicators, the group agreed this was an immensely helpful contribution. They also offered specific comments and suggestions, including:

*"The word 'poverty' is problematic: 'very World Bank-ish.' What about 'quality of life'? We need to think about the society we want, and what people need in that. We should **frame our work positively**, not removing negatives. Other options might include '**well-being**' or '**improved equity**.' Moreover, poverty reduction is an end goal, outcome, or bi-product of what community philanthropy does, and can only achieved through everything else that we do. **It is how we connect with people in the world that matters**."*

*"We should avoid the risk of using a single indicator because our work crosses many domains so that **multiple indicators are required**."*

*"The indicators make sense, but they remain **difficult to actually measure** (in many cases)."*

"We should include environmental justice."

*"It might be more effective to **simplify indicators**. If you try to measure everything you can get into trouble."*

*"If we're aiming for something new, we should feel freer to escape from more traditional indicators. We **need to be creative**, and to show why and how we're different."*

*"The **indicators need a narrative** attached to them, otherwise they don't make sense."*

*"No organization needs to use all of the indicators; **people can pick the ones that apply to your situation and adapt accordingly**."*

These comments, while not necessarily pushing in the same direction, are helpful in moving the development of a system to the next stage. By starting with a draft list of indicators associated with community-led development, people can gain ideas on what to measure based on what may be happening in their locality. They are not an exclusive list of indicators, nor are they compulsory, but they can act as a framework for people to choose indicators they want to measure depending on what they are trying to achieve in their community. It was broadly agreed to be important that organizations have flexibility in what they choose to measure.

If a list of indicators is presented, people agreed that there must be an option to choose the indicator(s) that matter and mark the others as 'not applicable.' When this approach was discussed on follow-up webinars, it proved to be popular. As one person put it:

"It has an element of standardization but without a forced framework and allows for inspiration . . . if you choose your top indicators and add a story, that gives an idea of what matters for people and a richer picture of what the work is about. You can only learn so much from quantitative indicators. Maybe in terms of measures of success we can build a system that inspires."

Indicators as Assets, Capacities, and Trust

The GFCF first presented the Assets, Capacities, and Trust (ACT) Framework as the 'three-legged stool' of community philanthropy in 2010. Despite differences of context, institutional focus, origins, and partners – which includes community foundations, women's funds, environmental funds, public foundations, and other grassroots grantmakers – all participants identified with the ACT framework, viewing it as critically important in their work. These were a) building local assets, b) strengthening the capacities and agency of communities and c) building trust.

The ACT framework was based on data collected from GFCF's grant partners, which asked partners to rate their work according to twenty key indicators, which loosely fall into bonding, bridging, and linking types of social capital.[66] The approach was based on the premise that community is about connections between people, with the implication that the purpose of a community-led approach is to invest in people, their social and psychological ties (bonding social capital), the institutional arrangements that allow them to organize themselves more systematically (bridging social capital) and their ability then to engage with, leverage, and make claims from others (linking social capital). The twenty indicators are detailed in the table below. In bold are the top five indicators as prioritized by organizations funded by GFCF.

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66 For elaboration on bonding, bridging, and linking social capital see: Adrich, Daniel P. (2011). "The Externalities of Strong Social Capital: Post-Tsunami Recovery in Southeast India." *Journal of Civil Society*, Vol. 7(1): 81–99. Also: Schuller, Baron & Field, 2000; Putnam, 2000, 2007; Woolcock, 2002; Leigh, 2006; Alesina & Le Ferrara, 2000; Szreter & Woolcok, 2004; Wetterberg, 2004.

GFCF Indicators	Poverty reduction
	Building trust in the community
	Strengthening community groups
	Strengthening racial equality
	Strengthening gender equality
	Strengthening other marginalized groups
	Building community assets / local philanthropy
	Capacity building of local institutions
	Advocacy and participation of local people with authorities
	Bridging relations between different communities
	Building field of community philanthropy
	Building connections between community foundations
	Spreading skills and knowledge between community foundations
	Building the field of community philanthropy across a region of the world
	Building the field of community philanthropy across the world
	Building connections with policy makers or funders
	Raising visibility of community philanthropy with policy makers or funders
	Changing practices of policy makers or funders
	Changing policies of policy makers or funders
	Gaining more resources from policy makers or funders

In an attempt to understand what some of these outcomes might look like in practical terms, GFCF grant partners are asked to detail progress made against three indicators of their choice from the above list. Partners are encouraged to choose the three indicators they deem to have been most significant and explain what progress on that indicator actually looks like in each case. Analysis of this data shows that three factors – assets, capacities, and trust – emerge as dominant priorities, time and time again. Therefore, this was perceived to be a good starting point for further developing a system of measurement. And this decision was driven by feedback from practitioners who would need to own the system they were helping to create.

The GFCF hosted two retreats in 2018 and 2019 (in South Africa and Mexico respectively) to revisit the ACT framework with a global cohort of 15 community philanthropy practitioners. The meetings set out to test assumptions behind the framework (e.g. do all three characteristics need to be present to ensure that local development is people-led?) and build out each of the three categories in detail (with sub-indicators for each), based on the practices and experiences of the participating cohort. The question was whether it would be possible to create an overarching framework, or information ecosystem, where

hyper-local metrics can coexist with higher level ones. Using an action learning approach, partners had the opportunity to test, deepen, and further explore some concepts in relation to their own organizations.

Each of the 15 members of this global cohort expressed an interest in strengthening the measurement side of their work. Despite the variety of organizations represented in the meeting (varying in size, location, context, focus of interest, etc.), participants had several common characteristics. Everyone was involved in people-led development. They shared a commitment to shift the power **to the community level**, and the belief that the only way interventions in local communities will actually work is by ensuring that they are owned and shaped by the people they are meant to reach. And on the first day of their South Africa meeting, the group identified ten common principles of community philanthropy, which shape their work:

1   Community philanthropy is context specific, but has three universal principles:

- Builds assets (which are owned and controlled by people and communities, rather than external institutions);

- Builds trust (in the relationships between people, communities and institutions); and

- Develops capacity (building the agency of people who are marginalized in our societies to develop their own solutions).

2   Community philanthropy values the inner strengths of communities that are both manifest (on the surface and visible) and latent (below the surface and potential).

3   Community philanthropy supports what people want to do; it does not confine them into a project way of thinking.

4   Community philanthropy takes 'the road less travelled' (after Scott Peck). It pursues an alternative development paradigm which is people-centred, as opposed to institution-centred or money-centred. The underlying impetus is to develop a society based on the energy of economic and social forces that tend towards a more democratic, convivial and egalitarian spirit.

5   Community philanthropy has many ways of operating, though acts primarily as an enabler not a producer. In this it plays essentially an 'interstitial role' – producing energy between institutions rather than delivering specific outputs. Organizations lay the conditions for a successful community rather than producing these conditions directly – local people do that.

6   For community philanthropy, money is important but not central. Energy is the primary force, and money supports the process rather than leading it.

7   Community philanthropy organizations typically find measurement to be a struggle. They commonly deal with 'intangibles' – trust, dignity, hope, etc. – factors that enhance our 'quality of life', but which do not figure in the economist's toolbox. However, organizations are often doing better than they think and their measurement

systems usually capture important stuff. There is much scope to develop such measurement systems, starting from the strengths that organizations have.

8   To measure community philanthropy, we need to get beyond the simple log frame and away from a linear change model that relates inputs and processes to outputs and outcomes. We need to build something different that better reflects the complexity of what happens in community processes. This is likely to be a hybrid of various methods (outcome harvesting, surveys social network analysis, stories, pictures and visual images). Quantitative and qualitative analysis both matter. There needs to be a deeper understanding of the four types of data (nominal, ordinal, interval and ratio) and when and how to use these.

9   Communication and measurement are related. Communication is often a way of deriving simple messages from complex data.

10 The system must meet four criteria with the acronym 'ours' – (a) owned, (b) useful, (c) robust and (d) simple ('as simple as possible but no simpler' to paraphrase Einstein).

The conclusion from their first cohort meeting was that there needs to be a universal system of measurement with flexibility to adapt to specific contexts. It follows that we must build context into the process so that a universal system accounts for local variations. This means that local variation is anticipated and encouraged rather than seen as anomalous cases or exceptions to the core. In this way, the group sought to promote solidarity across the field and ensure that evaluation works for everyone. As one participant put it: "We need to stand together on this as a global common front."

Measuring thick concepts: a knotty problem

As discussions went deeper, it became clear that practitioners are preoccupied with big ideas like participation, hope, resilience, and dignity. Such ideas are important for our world. At the same time, these concepts are difficult to pin down for two main reasons. First, they are what philosophers like to call '*thick concepts',* meaning they contain both descriptive content and evaluative content. Taking democracy as an example, the word denotes 'real' and 'visible' concepts such as parliaments and elections, but it also connotes 'ideal' and 'latent' concepts such as freedom and equality.

The second difficulty is that these concepts are 'cluster concepts', which are made up of many different components. Taking our example of democracy once again, there are many checks and balances required if a society is to be considered democratic, and there is no single measure that will guarantee it. All this means that ideas such as participation, hope, resilience, and dignity are complex, value-laden ideas made up of many different components and therefore subject to a variety of interpretations. This matters because it means that practitioners are working with concepts that are difficult to define, implement, and measure. And this makes it almost impossible to apply simple, linear models of measurement that trace inputs to outputs in a way that claims a scientific approach

to validating programme design. Workshop participants sometimes described this situation as 'measuring the unmeasurable.'

Measurement principles

Overall, practitioners were motivated to co-create a standardized method to measure their progress, in a way that lifts up the field and increases its recognition by others. That said, participants were careful to establish guidelines that would need to be met to achieve the type of measurement system that is needed. One contributor to a webinar suggested that any measurement system should 'treasure, not measure.' This idea struck a positive chord among other participants. Applying such a principle was viewed as increasing the prospects of creating systems and processes that lead to positive outcomes for the society we want.

People also felt that a measurement system needs to be tight enough to bind us together but loose enough to allow for diversity and adaptation. Any model should be 'enabling', meaning that there are options. Options to measure different things. The system should not be compulsory or have restrictive elements. Moreover, participants sought a measurement process that could be implemented and understood by the people actually doing the work to build it.

At a Candid meeting, there was much discussion about finding a way for knowledge to emerge in a more organic, bottom-up way. Most participants in this roundtable were leaders of infrastructure organizations, and so at the core of their work was collecting and sharing what organizations in their regions are doing and learning; nevertheless, they all shared a desire to find a way for knowledge to emerge in a more organic bottom-up way. A suggestion was made to document the experience of 'bottom-up' created organizations:

> *"Documenting case studies like Tewa, organizations that grow organically, are much less well known than the top-down created technocratic organizations, about which there have been tons of case studies. We just did a project to document 12 cases of these types of organizations. What are the leadership building models of these organizations? What is their definition of scale, impact, leadership, sustainability? It's not defined in a technocratic way."*

There was also keen interest to capture issues of power in philanthropy and development. For example, in the Brazil roundtable, there was a desire to get beyond standard measurement practice. One small breakout group elaborated on this issue:

> *"In the group we had key discussions saying the measurements we have today are not enough. We need to go beyond the 'cold' indicators and see how we can measure a transformation in the entire dimension. How do we measure engagement and participation? How do we measure the idea of shifting the power? How do we identify things that are not common for everyone? It's hard to keep the measurements accurate and close to the*

reality. We need stewardship so people feel ownership. It is important to consider this more so than basic indicators.”

A contributor at the Candid meeting in Serbia also sought to get beyond standard approaches:

“What is long-term? Measurement must capture non-linear processes – i.e. different aspects moving in different directions within the same initiative. To be able to adapt strategies to changing environments, we need to capture the process and the structure. It’s not about indicators but layers of what needs to be captured and then making sure to have context-specific indicators to capture those layers.”

Another factor that helps is peer support. This is best done in a face-to-face way, through informal networks. As one person put it: “Information, databases, and more are useful, but you need personal contact. That’s why we try to organize and convene, so we can also build trust and work together and collaborate.” Another person described their peer network in Eastern Europe:

“Our informal network works perfectly well. It is based on existing, long-term relationships, and is easier because community foundations don’t fight for resources. We can share tips and tricks because we are not competitive. There is no need for this to be institutionalized.”

People also mentioned that they value learning from peers in other countries. “We mainly learn from the experiences of colleagues abroad.”

There was one further observation worth mentioning in relation to measurement principles. People felt that the most important goal of measurement is learning. During the Nepal retreat, people suggested reorganizing the acronym MEL, which stands for Monitoring, Evaluation and Learning, to read LME, which starts with Learning, and is followed by Monitoring and Evaluation.

Can technology help?

In the Candid consultation, we asked about the role of technology in measurement and found that it is a mixed blessing. In some cases, technology presented untapped opportunities. Technology was untapped either due to knowledge or capacity. In other cases, the use of technology was seen as distancing or unproductive.

In terms of helping people to develop measurement systems, personal spaces were regarded as vastly superior to online spaces in building relationships and fostering learning. Many participants shared frustrations about the difficulty of getting people to participate in dialogue and discussion or share information through online channels. Online forums, intranets, Facebook groups, and WhatsApp groups were some of the various platforms specifically mentioned.

Following are a range of illustrative comments on technology:

> *"In our context people won't go online but we raise most of our money from multiple individual donors."*

> *"We have a Facebook group. Sometimes someone poses a question and there are 70 people on there, but nobody answers. We need a more personal space to build relationships and then follow up online."*

> *"We found it hard to understand where the different resources and knowledge was. We started a process of implementing Salesforce but met a lot of resistance within the organization."*

> *"One of the main things members ask is how to manage knowledge better. Much time is spent reinventing wheels. One good communal online space where people can chat. Already, we see the same questions come up again and again in this space. We also have an intranet to share that is internal but not used well."*

> *"People are working on a new platform to democratize application development. When we talk to people who are using the platform to create apps, they all say, 'don't invent it until you know what people want.'"*

> *"Regular in-person meetings for peer-learning adds so much more value than online spaces."*

Many people shared that technology becomes useful after relationships are built. For example, there is a desire for investing in learning and relationship building, which is centred around specific topics over several days as opposed to one short meeting. Once relationships are established, and there has been some deeper learning in-person, then there is greater potential for continuing the learning online. WhatsApp groups were mentioned as successful models:

> *"Our WhatsApp groups are each about 80 to 100 people. They are doing what they are doing, for us the data of it is most interesting because we can look at the patterns and behaviour of people to understand people's interests and the network. Often it's just to promote or send invites. We have tried a similar online space to do the same, but people don't engage with it."*

However, a concern was also shared that WhatsApp and other mobile applications can blur when working across multiple time zones. The overall challenge is, as one person put it, is: "How to link people, not information?" At the same time, information is important. For online knowledge resources to be useful and help organizations to learn and work more efficiently, several participants emphasized the importance of specialized and highly curated content. The tagging on the WINGS knowledge centre was mentioned as an example. One person explained that the tagging is too generic for the WINGS library to be useful. Another person suggested that there is a role for online information. Two comments by different individuals are offered below:

> *"I'd like to see resources on thematic issues like governance, grantmaking, social justice. An online library where I can add to it and I can find what others have added . . . that way, there's onus on me to add content as much as accessing other people's content."*

> *"I'd like to see next level curation. I want to know why that resource is particularly interesting. That's why Twitter is a good tool for both learning and relationship building. On Twitter you are not just seeing a knowledge resource, you see what your peers are thinking about that knowledge resource."*

These comments were made amidst general agreement that online spaces for knowledge sharing and interaction usually end up having very low participation.

Measurement tools

At various points in this paper, we have referred to various tools used to measure community philanthropy. In this section, we aim to bring various strands of our consultations together to see where we stand on the question of tools. For example, in a discussion about different tools, one funder at the November 2019 Symposium in London said:

> *"How do we move things forward? In the traditional aid sector, we swing back and forth with our methodology. 30 years ago, it was participatory research, now there is a trend around adaptive M&E and participatory research, etc. There are interesting practices and ideas out there, so are we talking about harvesting these existing methods?"*

Rather than following the fashion for a particular tool, people participating in the various meetings and online sessions generally saw the value of using many different tools. They wished to expand the tool set used rather than simply using one technique. For example, in the Brazil meeting, although everyone was focused on the human part of the work, one person noted that:

> *". . . sometimes we feel measurement leaves out the human part of what we do. Everyone agrees we need to convince donors that there are many other ways of measuring what we do. How can we communicate this to our funders and sponsors?"*

Stories were a staple item but people mentioned other tools, including: Outcome Mapping[67], Outcome Harvesting, Vital Signs, Social Return on Investment[68], PANDO, and collective sensemaking.[69] While the majority of these tools are known and have books or guides to explain how they work, less is known about PANDO, which has recently been adopted by the GFCF and its partner organizations.

Pando LLS (PANDO), developed by Root Change, is an example of an online platform that helps to generate network maps that visualize relationships. Data filters and analysis tools help to uncover key actors, areas of collaboration, and dynamics of a network. The platform also gives administrators the ability to collect and analyze data relating to trust and relationship quality among map participants. The combined power of network maps and feedback surveys offers a holistic understanding of a network, it facilitates dialogue, and it allows organizations to track changes in the network over time.

In 2016, the GFCF introduced PANDO to participants at their Global Summit on Community Philanthropy in Johannesburg. Over 400 participants at the Global Summit were invited to contribute towards building a network map and viewing the result, together, in real time. The map that was developed is rooted in four measures, each assessing key dimensions of local ownership. The four measures include: leadership, connectivity, mutuality, and financing.

Leadership measures the degree to which local actors are able to: set priorities, influence direction, lead decision making, define success, and receive recognition as experts by outside donors, institutions, and organizations. This dimension measures the emergence of local knowledge resource hubs and intermediaries (as opposed to international sources).

Connectivity assesses the diversity and density of relationships and collaboration between local actors. It examines the degree to which networks of local development actors have the motivation, opportunities, and incentives to work together to solve problems. It asks to what extent local actors are connected to local resources, knowledge, and expertise.

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67 Outcome Mapping is an approach to planning, monitoring and evaluation designed by the grantmaking organization International Development Research Centre (IDRC). Outcome mapping puts people at the centre and helps measure contributions to complex change processes. It defines outcomes as changes in behaviour and provides a set of tools to design and gather information on these changes. (For more information on outcome mapping visit https://www.outcomemapping.ca.)

68 Social Return On Investment (SROI) is a framework for measuring and accounting for social, economic and environmental value resulting from the activities of various social change agents. Developed by Jed Emerson and others in the US and further adapted by Social Value UK, it uses monetary values to represent this value. This enables a ratio of benefits to costs to be calculated. For example, a ratio of 3:1 indicates that an investment of £1 delivers £3 of social value. SROI is about value, rather than money. It was developed from social accounting and cost-benefit analysis and is based on seven principles: (1) Involve stakeholders; (2) Understand what changes; (3) Value the things that matter; (4) Only include what is material; (5) Do not over-claim; (6) Be transparent. (7) Verify the result. (For a guide on SROI see: https://social-change.co.uk/sroi?utm_source=googleads&utm_medium=responsive&utm_campaign=sroi&gclid=CjOKCQiA4sjyBRC5ARIsAEHsELFy1rvdlQiFxv6wwKgO7CUHLJfmuuq41INk1vFCn3Tkp2fDii1NC4gaAipxEALw_wcB)

69 Collective Sensemaking stresses the importance of building diverse alliances and of strengthening local capacity to think and work politically, by engaging local actors in making sense of data and patterns related to both programming and context. Defining how things are changing with local stakeholders and partners both helps programming to be more alert to changes in context and shifts ownership, enabling greater local leadership of the effort. Before you can engage in collective sense-making, you need something to make sense of. Investing to gather data that is useful to a variety of stakeholders makes a huge difference to the quality of the analysis. (For more information, see: https://usaidlearninglab.org/library/tips-collective-sensemaking)

Mutuality assesses the degree of trust, respect, openness, voice, and responsiveness across a local development system. This measurement includes strength of ties between actors and the extent to which parties feel comfortable expressing disagreements, responding to concerns, or working together equally.

Financing measures the degree to which local system actors are dependent on international financial resources and whether connections to local funding opportunities are improving. Financing is measured through a systematic assessment of the dominance of a few key actors, the evaluation of local funding sources, and connectedness to local resources.

Using the network map and feedback surveys, the PANDO platform generates a score for each measure, which can be used to assess areas of improvement, change over time, and facilitate learning and adaptation.

While there are a number of tools out there, using them – or not – depends on whether or not they add anything to the understanding of community philanthropy. There is no single magic approach. And it was generally believed that using a variety of different tools is more likely to offer useful insights than applying a single approach.

Moving forward

The events, webinars, and consultations organized over the past three years were well-attended and sometimes oversubscribed. People participated keenly and expressed a desire to keep working together to find a measurement system that works. Many are eager to work on this because current measurement arrangements frustrate their progress and limit their ability to tell their stories to the world. It is a burning issue.

As a result of the various consultations, two different but related work streams emerged that contain the potential to develop a measurement system. One is local experimentation, and the second, which follows the first, is dialogue with funders. Also beginning to emerge was criteria for success in these next steps.

Local experimentation

The first proposed work stream is a programme to enable local community philanthropy organizations to tell their story through two lenses: (a) a people-led lens, and (b) a traditional monitoring and evaluation approach. This dual approach would enable the differences to appear between an approach based on judgements of what matters to local people and an approach based on what matters to external agencies and funders.

A series of case studies would build a system of learning developed by a group of peers working from the bottom-up. This would involve co-production activity between local people from the community and staff of community philanthropy organizations. People agreed that 'deep listening' to local people was important to ensure that what was measured was in accord with their wants and needs.

Although the system would have guidelines and allow for the common features of community philanthropy to be included, it would be an 'enabling framework' with optional items, rather than a system with prescriptive 'must do' rules. This leaves room for and encourages uniqueness for different approaches and contexts. It was important to distinguish between measures that work in a specific local context from measures that work across a field, either at a country level or for global application.

There was much support in the consultation for developing case studies that compare a classic logic model evaluation approach used by aid agencies with a locally developed approach that captures nuances that matter to practitioners (using narratives, outcome

harvesting, appreciative inquiry, and other tools). This would be an experiment to compare two different approaches to collecting 'evidence' of social change using existing data as well as collecting new data in diverse situations. Comparing the two models could prove enlightening given the common struggle between what is deemed objective data (i.e. the desired output and outcome indicators, often identified or approved by donors) versus what is deemed subjective data (i.e. the beliefs and experiences of people living and working in a locality). We can explore the strengths of each approach in relationship to questions such as:

- How do communities define success? Are success indicators designed for organizations or for people?

- How do measures inspire experiences that lift people up?

- How do we assess process?

- How do we assess outcomes?

- What are the sources of bias in our measures?

- What can and can't we measure?

This kind of technique could help to reveal distinctions when applying community philanthropy concepts as a standard in measurement of social advance.

By pooling ideas emerging from practical experience at the local level, this work would result in a framework to capture the essential added-value of community philanthropy and community-led development that could be applicable in different contexts. This could result in a menu of tools and techniques arising from case studies, together with examples of successful approaches. We might even be able address difficult notions such as how to measure 'trust.'

Over time, the process would strive to develop 'industry examples', being explicit that we do not suggest a 'one size fits all' approach. Any system must allow for the fact that cultures and contexts vary dramatically from place to place. The results of individual work in different localities would offer a field-based perspective. Scientific validity would be justified on the basis that our method of abductive reasoning is a legitimate method of enquiry.

Dialogue

The second approach, dependent on progress with the first, would be to share the emerging system to negotiate with funders and development agencies as a basis for negotiating about the need to include currently 'invisible' concepts (e.g. dignity and power) into the evaluation mix. Opening up such conversations may lead to an informed synthesis of top-down and bottom-up approaches to measurement. Of particular importance, is the relationship between frequently used output indicators of progress

(e.g. number of bed nets) and what we believe to be more meaningful indicators of progress (e.g. trust in the community).

The approach shows the necessity of seeing measurement from a number of different points of view. We should beware the trap of seeing one model as 'right' and another 'wrong.' We need to see this as a functional question in which different methods suit different purposes. We need to frame the question of measurement as a 'both/and' as opposed to an 'either/or.' Opening different kinds of conversations may lead to a process of negotiation between community philanthropy practitioners and people working in development aid agencies and institutional philanthropy.

The process of dialogue should raise awareness of the importance of humility in approaching measurement. Funders generally don't and often can't understand the culture and context in the places where they are funding. They need to learn to listen and give more weight to assessments and priorities of people working on the ground. Funders often have an unconscious belief that their systems are inherently superior to those of local people. As studies have shown, however, this is rarely the case. For community philanthropy organizations, there is a need to be more systematic about their learning and to stop putting it in the 'too difficult' box. No one has a monopoly of insight and there needs to be a process of joint dialogue that results in changed attitudes and behaviour all around.

Success criteria

At the last meeting, which took place during the November 2019 Pathways to Power Symposium, participants suggested four broad categories of criteria to determine the success of this endeavour:

1   It will be useful, and it will be used:

■   What we come up with will actually be used by organizations.

■   We have to make sure it's embedded in our work and we are not creating new things that are not useful to our work.

■   We are measuring to prove or to justify various approaches, but there is also an element of educating people about the work.

■   The approach needs to be inspiring and motivating, not just technical.

2   It will be easily adaptable to different contexts and interests:

■   We have to build diversity into our system. We need a framework to make sure that people measure some common things, but other levels need to be tailored.

■   There would be flexibility to choose what to measure within a parameter of broadly shared interests.

■   It would help us to connect our work to the SDGs.

3   It would provide inspiration rather than standardization:

■ It would inspire rather than standardize us.

■ Choose your favourite indicators and add a story that gives an idea of what matters for people and a richer picture of what the work is about. (You can only learn so much from quantitative indicators!)

4   It will be accountable and empowering to the people/community:

■ What we come up with has to be useful for the people who are providing the data as opposed to the other audiences. Community organizations are the most direct connection to the people who are sharing their experience.

■ We have to make sure we get to the people. Community organizations are not necessarily involving or being accountable to the people. There needs to be a process to ensure the voices of people are captured.

■ It should follow the principles (manifesto) of #ShiftThePower.

■ A key unit of impact is a person, their knowledge, skills, and behaviour. All other things need to build on this unit of analysis

■ It is not extractive: 'treasure not measure'.

Annex A:
Contributors to the process

The process has been undertaken by three organizations: Candid, GFCF and PSJP.

The staff leading the process in those organizations are Lauren Bradford and Inga Ingulfsen (Candid), Jenny Hodgson and Wendy Richardson (GFCF) and Chandrika Sahai (PSJP). Barry Knight has led the process of facilitation for all three organizations.

Barry Knight and Dana Doan have written the report on the basis of contributions from:

Adriana Guimaraes	Dajana Berisha	Hilary Gilbert
Aisha Mansour	David Crook	Hope Lyons
Aleksandar Krzalovski	David Jacobstein	Iara Rolnik
Alex Kirkwood	Dawn Shackles	Inese Danga
Alina Ionova	Delphine Valette	Inga Ingulfsen
Alina Porumb	Diane Sousa	Ingrid Srinath
Amalia Fischer	Dragan Srekovic	Irina Novikova
Amalia Souza	Eddy Buranakul	James Magowan
Ambika Satkunanathan	Ela Bălan	Janet Mawiyoo
Ana Valeria Araujo	Elena Malitskaya	Jannelle Wilkins
Anastasiia Iurkina	Elida Miranda	Jasna Jašarević
Andrew Kingman	Ese Swona Emerhi	Jennifer Pobi-Browne
Anja Bollhof	Eva Rehse	Jenny Hodgson
Artemisa Castro Felix	Evan Bllom	João Paulo Vergueiro
Avila Kilmurray	Fabio Almeida	Jon Edwards
Basak Ersen	Fernanda Lopes	José Marcelo Zacchi
Benjamin Bellegy	Fernando Rosseti	Justyna Frydrych
Beulah Fredericks	Franca Smarrelli	Kim Soliman
Carlos Garrido	Gabriella Benedek	Kseniia Obukhova
Carmen Genis Gómez	Galina Maksimovic	Larry McGill
Chalwe Nyirenda	George Hamusunga	Laura Ross-Gakava
Ciprian-Mihai Paius	Gerry Salole	Lauren Bradford
Claudia Liebler	Gill Hughes	Leanne Kelly
Colton Strawser	Graciela Hopstein	Lovemore Mupaza
Cristina Orphêo	Gustavo Bernardino	Lucy Gilbert
Dawn Shackells	Henrique Silveira	Madalina Ene

Maira Gabriel

Marcia Kalvon Woods

Mariane Maier Nunes

Marija Jakovljevic

Marina Konovalenkova

Marina Mikhailova

Marjia Mitrovic

Mathamsanqa Moyo

Maurice Nyambe

Mihaela Giurgiu

Mihai Florin Rosca

Nadya Hernandez

Natalia Zavialova

Natalie Ross

Nathan Koeshall

Nina Samarina

Oksana Petrova

Olga Nikolska

Olga Panchihina

Olga Simon

Oznur Akkaya

Patrik Vesan

Paula Fabiani

Quyen Ngoc Tran

Raquel Altemani

Rasha Sansur

Rebekah Goddard

Regina Cabral

Renato Araujo

Rita Thapa

Ritupon Gogoi

Roberto Vilela

Ryan Borcherding

Selma Moreira

Semyon Nikonov

Shubha Chacko

Snehlata Nath

Stella Chege

Tamás Scsaurszki

Tarisai Jangara

Tatiana Burieva

Taulant Hoxha

Thao Lam

Tongting Xiao

Urmila Shrestha

Vanessa Reksodipoetro

Vera Barova

Vera Titova

Vesna B. Agic

Viviane Hermida

Wendy Richardson

Yasmin Monteiro

The GFCF works to strengthen, harness and demonstrate the value of community philanthropy as an essential element of community-led development and as a strategy for shifting power. Through small grants, technical support, peer exchange and evidence-based learning, the GFCF helps to strengthen community philanthropy institutions around the world, so that they can fulfill their potential as vehicles for locally-led development, and as part of the larger global infrastructure for progressive social change.

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About the authors

Dana R.H. Doan has worked in community development and international relations for over 20 years. She founded the LIN Center for Community Development in Vietnam, is an advisor to nonprofits in the U.S. and Southeast Asia, and is currently a doctoral student at the Lilly Family School of Philanthropy.

Barry Knight is Adviser to the GFCF, and the author of 'Rethinking Poverty.'