

REIMAGINING LEARNING & EVALUATION

A FIELD BRIEF FOR CRISIS AND TRANSFORMATION

How philanthropy can leverage equity-centered evaluation as an essential tool for social good during unprecedented times

Over the past decade, philanthropy has made significant strides in advancing culturally responsive and equitable learning and evaluation (L&E) practices. Foundations have increasingly embraced relationship-centered approaches, community-driven evaluation, and more responsive reporting practices that prioritize meaningful learning over compliance. These gains represent years of intentional work to shift power dynamics and center equity in philanthropic practice from noteworthy groups such as the Equitable Evaluation Initiative (EEI), the Trust-based Philanthropy Project (TBP) and Expanding the Bench (ETB).

As we continue deepening this transformation, we face new and challenging headwinds that, while not unexpected, have arrived sooner and with greater intensity than many anticipated. The current socio-political landscape has created urgent challenges for philanthropy's L&E field to evolve in ways that maintain its strategic value and build resilience.

To better understand how foundations are navigating this evolving landscape, Engage R+D and Informing Change partnered with the Robert Wood Johnson Foundation (RWJF) to interview national and regional funders about their experiences leveraging equity-centered L&E during these uncertain times. We explored what L&E teams and their foundations are grappling with, what they are hearing from grantees and key stakeholders, and what factors are driving their L&E decisions. We also explored what transformations are needed to remain responsive while holding a long-term vision for equity.

This field brief elevates some of the tensions in philanthropy and the implications for learning and evaluation. **It serves as an invitation to explore what's needed and what it will take** not just to preserve but to strengthen the gains we have collectively made in culturally responsive and equitable evaluation (CREE) practices in the years to come.

What we're hearing from the field

In May of 2025, we interviewed learning and evaluation leaders from 10 national and regional foundations about the current context. Three interconnected challenges emerged from those conversations.

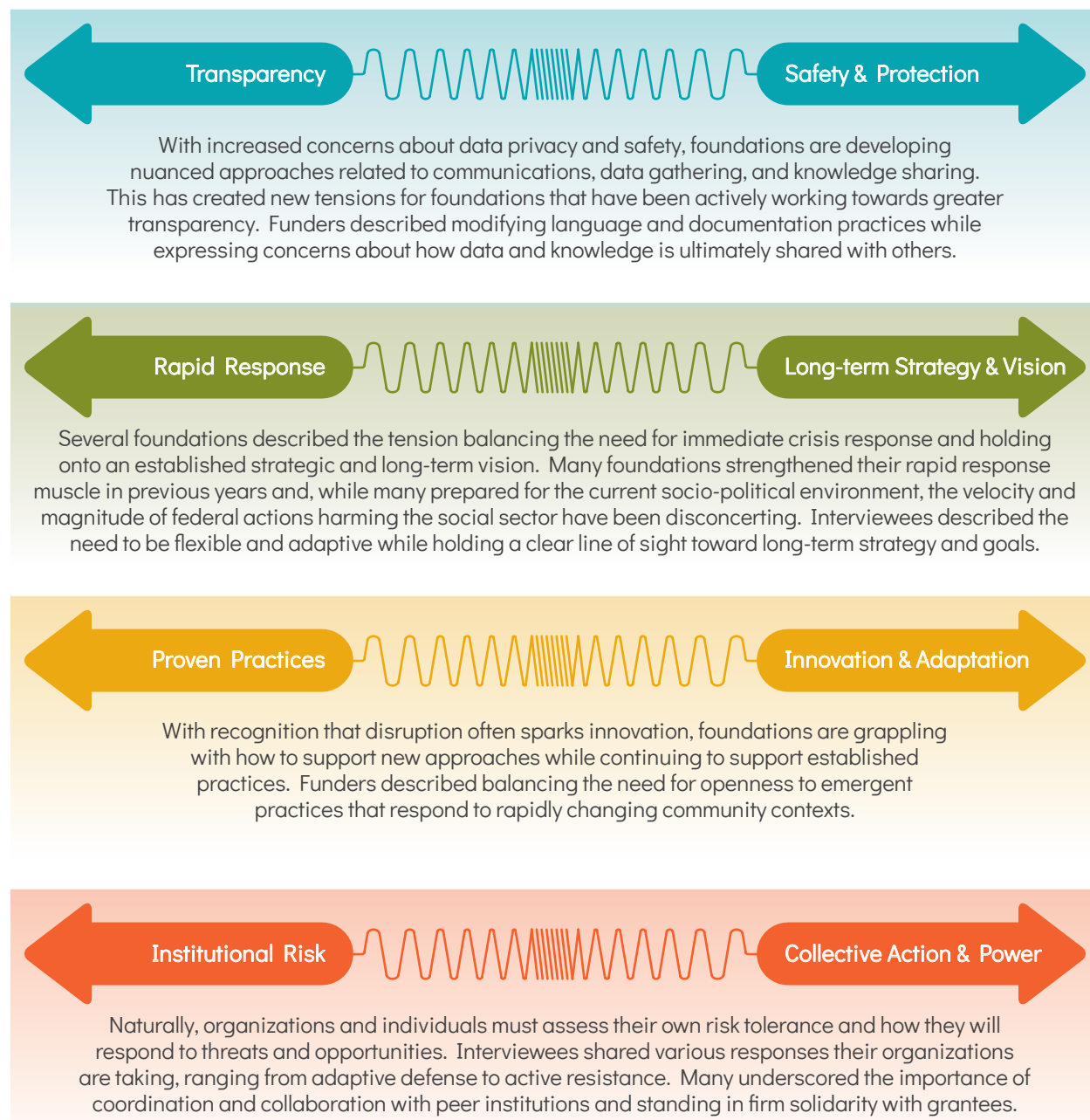
- **Social sector in distress:** Interview participants consistently reported that their nonprofit partners are experiencing serious financial distress and facing attacks on multiple fronts. One funder noted that grantees are asking the foundation to be more active on public platforms and create space not just for funding, but for strategic thinking and peer learning. Nonprofits are requesting support for safety measures, including legal and cybersecurity protections.
- **Foundation capacity challenges:** Interview participants described how efforts to rapidly respond to crises have intensified workloads, leaving grantmaking staff overwhelmed. Several interviewees noted that limited mental bandwidth has impacted their teams' ability to engage in structured learning, with evaluation efforts often sidelined for more immediate demands. Some interviews referenced the ongoing tension with foundation boards that want dashboards and quantifiable data when rapid, community-centered qualitative insights are actually better suited to navigate these uncertain times.
- **L&E infrastructure erosion:** Multiple interviewees expressed broader concerns about evaluation infrastructure, observing fewer commissioned evaluations, slashing of federal research grants, and evaluation firms downsizing or closing. Federal funding cuts have created both direct impacts on evaluation capacity and secondary effects, such as reduced access to publicly available data. Several interviewees expressed concern about the erosion and future of the field's learning and evaluation infrastructure which affects everyone's capacity for evidence building and effective decision-making.

Navigating complex tensions: What we're learning

The heart of our findings centers on how foundations are navigating multiple tensions that don't offer easy resolution. Rather than simple either/or choices, these emerging tensions often require foundations to navigate complexity by managing tensions simultaneously.

We've organized themes around a polarity framework as way to acknowledge and embrace both/and thinking while reflecting on core values and trade-offs. This nuanced approach to navigating tensions—which learning and evaluation practitioners can help to identify and support—reflects sophisticated organizational and field learning that goes beyond simplistic either/or thinking and supports effective strategy and decision-making.¹ Interviewees raised several tensions, outlined in Exhibit 1 below.

Exhibit 1. Key Tensions and Polarities Funders Are Navigating in Crisis



¹ For more on polarity thinking see Johnson, B (2014). Polarity Management: Identifying and Managing Unsolvably Problems. HRD Press. Amherst, MA.

Implications and future vision for learning and evaluation (L&E)

L&E practitioners are well positioned to help foundations navigate these tensions. Many of these practices are not new but rather build on well-established principles of culturally responsive and equity-centered evaluation. Interviewees noted the **strategic role L&E can play in the current environment**. Evaluators can serve as thought partners who can support scenario planning, forecasting, and rapid response strategies. Beyond efforts to prevent further dismantling of the current infrastructure, interviewees described a future focused on continuing to deepen relationship-centered and culturally responsive practices as well as opportunities to redesign our learning and evaluation systems.



1 Build on relationship-driven and equity-centered practices.

Culturally responsive and equity-centered evaluation has long emphasized the importance of relationships and participatory processes that shift power to individuals most impacted over extractive data collection. During times of uncertainty, reflective spaces that promote engagement and relationship building play a crucial role in breaking down silos and reducing fragmentation, as well as sharing information and support. For example, interview participants described the value of “strategic pause” sessions—both for grantees and internal foundation teams—to provide space for collective sense-making, strategizing, and scenario forecasting.



2 Preserve gains and protect L&E infrastructure through collaboration.

Funders and L&E practitioners can work together to preserve the learning and evaluation infrastructure that has been built over the years. This includes preserving knowledge management mechanisms for future learning even when public sharing isn’t immediately safe or feasible, funding strategic partnerships among L&E firms and supporting displaced L&E professionals, and supporting **peer networks and collaborative environments will promote shared strategies and solidarity**.



3 Rethink roles and design for the future.

Foundations must address hierarchical systems by moving from vertical to horizontal learning—leveraging community wisdom alongside institutional knowledge and replacing rigid reporting structures, such as mandatory dashboards, with meaningful, real-time learning exchanges. This includes shifting the often-transactional relationship with external L&E practitioners and models that hinder equity. The evolution of the L&E field requires adaptive muscle, the ability to name and navigate polarities, and work that connects evaluation to strategic goals.

Strategic opportunity: Strengthening what we’ve built

This is a pivotal moment for strategic and impactful philanthropy. Maintaining philanthropy’s capacity to learn, adapt, and improve is a critical investment in civil society and an effective social sector. The culturally responsive and equity-centered practices in our field aren’t just evaluation methodologies—they’re strategic assets that prove their value most clearly during times of uncertainty. Now is the time to deepen our equity-centered gains while building the resilience and strategic capacity needed to prosper in the decades ahead.

We welcome and invite your thoughts and reflections!

1. How can L&E practitioners support foundation staff and leadership during this period?
2. What additional support do grantees need that L&E approaches can provide or facilitate?
3. What do L&E practitioners need to sustain, deepen, and spread culturally responsive and equity-centered learning and evaluation practices and mindsets?
4. How can we collectively contribute to building more resilient, equity-centered L&E ecosystems?

With support from the Robert Wood Johnson Foundation, this brief is based on ten interviews with national and regional funders in May 2025. This field brief was developed by Sonia Taddy-Sandino and Pilar Mendoza of Engage R+D, and Michael Arnold and Omar Andres Alcover-Firpi of Informing Change.