



# Investments in Implicit and Explicit Dimensions of Place-Based Systems Change: A Tool for Funder Reflection and Action

This tool is one item in a suite of materials produced for the P-16 Community Investment initiative, a three-year learning engagement funded by the Bill & Melinda Gates Foundation across five communities (Buffalo, New York; Chattanooga, Tennessee; Dallas, Texas; the Rio Grande Valley, Texas; and Tacoma, Washington). The initiative seeks to understand and support the development of coherent, high-functioning, equity-centered, place-based systems that span all education sectors from cradle to career. Funders, practitioners, and other stakeholders interested in place-based systems change can use this tool in their work. It was developed by a team from Mathematica and Equal Measure, in collaboration with the foundation and its partners in the participating communities. Mathematica and Equal Measure serve as learning and evaluation partners in this effort.

## Key terms used in this tool



**Community:** the place that is the locus of a systems change effort and the population in that place, which a collective effort or initiative is seeking to serve



**Partnership:** a place-based, multi-stakeholder effort or initiative working to improve outcomes in a community



**Place-based:** geographically specific, as defined by the partnership; the unit may be a neighborhood, a city or town, or a state or region, depending on the partnership



**Systems change:** shifting the conditions—including structures, practices, policies, resource flows, power dynamics, and mindsets—that produce societal problems and hold them in place; typically involves cross-sector collaboration among stakeholders from public, nonprofit, philanthropic, or private institutions, as well as community constituents



**Co-design:** a collaborative process in which local stakeholders play a leading role in engaging and consulting with funders and other partners to design solutions to problems that local stakeholders have identified and prioritized

## Introduction

Given the complexity of social change efforts in an increasingly urgent social justice and geopolitical moment, the question is no longer *whether* funders should be investing in systems change, but rather *how*. This tool is intended to help funders<sup>1</sup> who have elected to invest in place-based systems change strategies assess the extent to which their strategic intent, culture, and capacity can support complementary dimensions of systems change. Our hope is that by using this tool, funders—and by extension the foundations within which they work—will further clarify how to focus their place-based systems change investments, leading to more coordinated, locally owned, and sustained impact.

Funders using this tool to co-design place-based systems change efforts that center community priorities, capacity, and context should note that this tool is grounded in a common set of principles:

1. **Co-design is essential for impact and sets the stage for funders to work effectively with community leaders, constituents, local organizations, and stakeholders.** Although internal conversation and planning within foundations are often necessary, the deliberate embrace of co-design, from ideation, to understanding community assets and needs, to implementation, to assessment, is an essential ingredient and disposition.
2. **Effective investments in place-based systems change require funders to be accountable, transparent, and vulnerable with the community they seek to support.** The power dynamic between funders and community members is real, and in some ways, unavoidable. When funders openly acknowledge this dynamic and model transparency and accountability among themselves—not just for those receiving funding—funders can create the conditions for true partnership, where investments can make an impact.
3. **Funders must have clarity about their own organizational willingness, capacity, and culture before they can invest effectively in place-based systems change.** We recognize that each foundation is unique in its approach to grantmaking and impact and that almost all philanthropic funding comes with some strings attached.

To invest effectively in communities, funders must know their own priorities and limitations well and work with communities to find areas of mutual interest so these “strings” do not overshadow real community needs.

4. **Effective place-based investment requires flexible and tailored approaches.** Finally, although it is common to acknowledge that all communities are different, the funder playbook is often limited or inflexible, whether in terms of eligibility criteria, preferences for certain types of organizations over others, or grantmaking processes including rigid grant terms, cycles, and reporting requirements. Effective investments work within and beyond standard grantmaking processes in ways that meet unique community needs.

## What are implicit and explicit dimensions of systems change? Why support them?

The evaluation of the P-16 Community Investments affirmed the critical importance of strategic investment in both implicit and explicit dimensions of systems change, which are “intertwined and interact with each other.”<sup>2</sup>

- **Implicit dimensions** are often less tangible and include the nature of relationships and power dynamics between organization and individuals, as well as shifting mindsets.
- **Explicit dimensions** of systems change are concrete and readily observable; they include policies, organizational programming, and resource flows.

In the case of the five communities in the P-16 Community Investments initiative, each of the community partnerships’ attention to “implicit” factors—such as building trusting relationships and interacting with humility among diverse stakeholders— was viewed as equally important to investment in “explicit” factors, such as adopting new assessment policies and tax levies. **Attention to both implicit and explicit dimensions of systems change is critical to advancing population-level outcomes over time.**

## How can this tool help me?

### Content of the tool

How you as a funder choose to support systems change in a particular community is driven by strategic intent and disposition, as well as the organizational culture and capacity of the foundation within which you operate. After determining that you are interested in funding systems change, you must then ensure that the investment approach is aligned with your foundation's organizational mission, culture, and ways of working with communities. Moreover, research suggests that a funder who focuses on effective systems change should also incorporate coordination and co-design with community leaders and stakeholders, as well as understand the extent and types of other, existing community investments. As a funder, understanding your disposition toward investing in implicit or explicit dimensions of system change, as well the context of other community investments, can help you to better coordinate your efforts in support of community leaders and stakeholders.

#### Exhibit 1.



**Implicit dimensions:** relational, conceptual, less immediately tangible

**Explicit dimensions:** programmatic, readily observable, concrete

This tool includes a worksheet and set of reflection questions. We intend for you to use these items for two key purposes: (1) to help you clarify your underlying orientation toward investing in systems change and (2) to consider ways that this orientation might relate to complementary or differing community-defined needs and perspectives.

The worksheet presents four domains of philanthropic practice that are relevant to place-based systems change:

1. **Strategic intent:** how a funder plans and executes change strategies
2. **Change and outcomes disposition:** how a funder thinks about impact and attribution
3. **Ways of working:** the internal culture and working norms of the foundation
4. **Grantmaking approach:** specific tactical approach for grantmaking

Each domain has three or four characteristics that help determine which direction you as a funder currently lean in your systems change approach—that is, the extent to which you are more likely to support implicit or explicit dimensions of systems change.

These four domains (and 13 characteristics) of philanthropic practice draw from our own and extant research on supports for philanthropic systems change efforts. Please see the appendix for additional resources and references.

### Guiding questions for individual reflection

As you complete the worksheet, we suggest asking yourself the following overarching questions to help you **reflect on your systems change orientation:**

- Which way do I (as a funder) lean on these dimensions?
- Am I more likely to support implicit dimensions of systems change, such as narratives to change mind-sets, community organizing to support power shifts, infrastructure to build new leadership, or developing community capacity?
- Am I more likely to support explicit dimensions of systems change, such as investing in programs, interventions, practices, or regulation change?

- In what ways does my orientation overlap with or differ from my larger team’s, department’s, or foundation’s preferences?
- Depending on where I lean, in what ways might I need to modify my investment approach to align with what the community prioritizes and needs and what other philanthropic and social investment partners are doing in the community?
- What specific adjustments to my funding practice might be necessary?

## Additional key points about the tool

Before you dive in, we offer some additional context and caveats:

- **Neither orientation—implicit nor explicit—is better than the other** in absolute terms. Investment in both dimensions is necessary for successful and sustained systems change and improvement in communities.
- **This tool is not intended to indicate a judgment about your orientation as a funder.** Rather, it is intended to prompt individual reflection that can lead to further conversations and informed action, ideally leading to investments that are suited to your circumstances as a funder and the community.
- For the purposes of the tool, we present the 13 characteristics as statements about funder **practice along a continuum**, recognizing that practice has many gradations.
- We leave it to you to **determine what level to apply when completing the worksheet.** It is designed to be completed by an individual, to spur further discussion and action with foundation peers and community leaders. However, you may wish to complete this worksheet as a group, focusing on a specific strategic approach, a grantmaking department, or your foundation as a whole.
- **By investing in systems change efforts, you as a funder inevitably become part of the very system you seek to impact.** This carries implications for how you “show up” and how you interact with other stakeholders in the systems change process. This tool may serve as a conversation starter with prospective grantees and co-investors, as well as other place-based systems change stakeholders.

- **This tool is a work in progress.** We offer it as a so-called 1.0 version. Our hope is that it will continue to evolve with additional insights and expertise from users.

## Funder reflection tool: In what ways do I lean “implicit” or “explicit” in my approach to place-based systems change?

### Directions

The following worksheet includes four primary domains and three or four associated characteristics per domain. For each characteristic, reflect and indicate where you fall on the continuum in supporting implicit or explicit dimensions of systems change. To do this:

1. **Determine what level or perspective you are taking as you complete the worksheet.** Are you representing your own disposition or adopting the perspective of your entire foundation, a program or strategy within your foundation, a specific initiative, or some other level within your organization? This is the “you” referenced in each of the statements. Whatever level you choose, make sure to keep it consistent throughout your responses.
2. **Within each domain, review and respond to each characteristic independently.** Read the two statements for each characteristic and place an X to indicate where you fall along the continuum. You might indicate an orientation, for instance, toward the left, the right, or somewhere near the center.
3. **After you respond to all characteristics in the domain, consider the reflection questions to examine your responses holistically.** For the domain as a whole, do you lean more toward investing in implicit dimensions, explicit dimensions, or a blend of both? What might this inclination mean for your systems change efforts? Use the comments space to record any reflections, reactions, or implications that come to mind.

## Domain I: Strategic Intent

Place an X along the continuum to indicate which way you (i.e., your foundation, department, etc.) lean

	Implicit Learning	← X →	Explicit Learning
<b>Prescriptiveness</b>	You are most comfortable with emergent strategies that are likely to evolve through implementation. You see social change processes as highly complex and nonlinear, and seek to use grantmaking to promote intended as well as unexpected opportunities to refine the strategy.	← →	You are most comfortable with proven, predictive models of change that identify key strategies and inputs that have been shown to lead to a desired set of specific outcomes. You see social change processes as highly complex, but seek to use grantmaking to identify and elevate essential elements or core processes that can be replicated and measured.
<b>Investment focus</b>	You prefer to focus on supporting infrastructure—such as building relationships and capacity for advocacy, collaboration, or narrative change—that intends to create the conditions for impact for your target population.	← →	You prefer to focus on specific programs, services, or interventions that intend to have an immediate, measurable impact on your target population.
<b>Equity orientation</b>	Your commitment to equity focuses on supporting and providing necessary resources for community leaders and organizations to define, articulate, and pursue activities focused on community agency, mobilization, power redistribution, organizing, and the like.	← →	Your commitment to equity focuses on identifying and providing necessary resources to support clearly defined equity-related programs, services, interventions, and measurable outcomes.

### Reflection Notes on Strategic Intent

Holistically, do you lean more “implicit” or “explicit” in this domain?	
To what degree do your current or future investments match your orientation in this domain?	
In what ways do you think your responses would be similar or different from your colleagues, or from the perspective of your foundation, overall?	
In what ways and to what degree do you think your funding orientation correlates with what the community wants or needs and with other existing philanthropic investments in the community?	
What adjustments might be possible or necessary to ensure balanced attention to implicit and explicit factors?	

## Domain 2: Change and Outcomes Disposition

Place an X along the continuum to indicate which way you (i.e., your foundation, department, etc.) lean

	Implicit Learning		Explicit Learning
<b>Progress measures</b>	You tend to articulate the types of change that you hope to see from the investment but are fluid in how these changes are to be measured. You prefer that progress metrics and measures of change are set by community partners.		You tend to articulate both the changes that you expect to see from the investment and the measures by which you expect to track progress. You prefer that selected measures are standardized across the investment portfolio to build key proof points.
<b>Attribution</b>	You are comfortable with not always knowing the ways in which your investment impacted the community and value generalized contribution over direct causality.		You are most comfortable knowing the specific ways your investment made impact and value specific evidence of causality from your investment.
<b>Timelines</b>	Your grant timelines are moveable to accommodate shifts in project timelines and timing of outcomes; you are able to modify your internal decision making and strategy timelines accordingly.		Your grant timelines are generally set and are rarely moveable to accommodate shifts in the timing of outcomes; grant timelines are linked to internal decision making and strategy timelines, which do not have as much flexibility.

### Reflection Notes on Change and Outcomes Disposition

Holistically, do you lean more “implicit” or “explicit” in this domain?	
To what degree do your current or future investments match your orientation in this domain?	
In what ways do you think your responses would be similar or different from your colleagues, or from the perspective of your foundation, overall?	
In what ways and to what degree do you think your funding orientation correlates with what the community wants or needs and with other existing philanthropic investments in the community?	
What adjustments might be possible or necessary to ensure balanced attention to implicit and explicit factors?	

## Domain 3: Ways of Working

Place an X along the continuum to indicate which way you (i.e., your foundation, department, etc.) lean

	Implicit Leaning	← X →	Explicit Leaning
<b>Disposition towards risk<sup>3</sup></b>	You are comfortable taking risks and expect occasional failure. Innovation is critically important to you, even if it means less predictable grantee or community progress, financial loss, or reputational risk.	← →	You prefer to design your grantmaking in ways that minimizes the risk of failure. You prefer to rely on proven methods or more established organizations as a means to achieve impact.
<b>Accountability</b>	You feel you are most accountable for being responsive to grantee and partner feedback and needs. <sup>4</sup>	← →	You feel you are most accountable to specific, concrete outcomes or results based on implementation progress and milestones set up in grantee workplans and agreements. <sup>5,6</sup>
<b>Centering expertise and decision making<sup>7</sup></b>	You practice “participatory grantmaking” with the belief that those who are closest to the issue are most likely to have the most effective solutions. You are most likely to cede decision-making power to the communities that you aim to serve.	← →	You practice “strategic philanthropy” focusing on expert-driven solutions and theory to solve societal problems. <sup>8</sup> You are most likely to engage external experts and professional consultants and rely on the content expertise of internal staff to develop strategy and make funding decisions.
<b>Learning disposition</b>	Learning is focused on root causes, testing assumptions and opportunities to make mid-course corrections.	← →	Learning is focused on understanding implementation progress and results vis-à-vis the expected theory of change or action.

### Reflection Notes on Ways of Working

Holistically, do you lean more “implicit” or “explicit” in this domain?	
To what degree do your current or future investments match your orientation in this domain?	
In what ways do you think your responses would be similar or different from your colleagues, or from the perspective of your foundation, overall?	
In what ways and to what degree do you think your funding orientation correlates with what the community wants or needs and with other existing philanthropic investments in the community?	
What adjustments might be possible or necessary to ensure balanced attention to implicit and explicit factors?	

## Domain 4: Grantmaking Approach

Place an X along the continuum to indicate which way you (i.e., your foundation, department, etc.) lean

	Implicit Learning	← X →	Explicit Learning
<b>Expertise</b>	You wish to be recognized by your grantees for your facilitation, relationship-building, and trust-building skills that you can bring to the community. Although you wish to be recognized for your content and technical skills, you view these as secondary areas of expertise.	← →	You wish to be recognized by your grantees for the depth of content and technical expertise that you can bring to the community. Although you wish to be recognized for relationship- and trust-building skills, you view these as secondary areas of expertise.
<b>Duration and scale of investment</b>	You prefer to support and seek out long-term investments and ongoing financial support for grantee organizations in the community.	← →	You prefer to support shorter time-bound investments and focus more on results of specific investments to determine future funding in the community.
<b>Allocation of funds</b>	You lean toward providing general operating support as a primary mechanism to achieve community impact.	← →	You lean toward funding specific programmatic initiatives as a primary mechanism to achieve community impact.

### Reflection Notes on Grantmaking Approach

Holistically, do you lean more “implicit” or “explicit” in this domain?	
To what degree do your current or future investments match your orientation in this domain?	
In what ways do you think your responses would be similar or different from your colleagues, or from the perspective of your foundation, overall?	
In what ways and to what degree do you think your funding orientation correlates with what the community wants or needs and with other existing philanthropic investments in the community?	
What adjustments might be possible or necessary to ensure balanced attention to implicit and explicit factors?	

## What comes next?

Looking at your responses within and across domains, you may find that you vary in the extent to which you lean toward investing in implicit or explicit dimensions of place-based systems change. Perhaps you tend to invest in discrete interventions to deliver specific results but also support leadership development and foster stakeholder relationships through convenings, showing a mixed orientation, supporting both implicit and explicit dimensions of systems change.

Ultimately, knowing your grantmaking orientation toward supporting implicit or explicit dimensions of systems change can help you to do the following:

- ✓ **Design, align, coordinate, and sequence** your investments.
- ✓ **Seek out partners** to complement your investment approach—for instance, if you are more likely to invest in explicit dimensions, then you will need funding and intermediary partners that can help address implicit efforts in order to fully support systems-level change in communities.
- ✓ **Be transparent** with grantees, community partners, and co-investors about your preferred systems change investment approach to best coordinating your efforts toward community improvement and lasting systems change. Aligning and coordinating within and beyond the foundation is a challenging but essential task that directly impacts the efficacy of systems-level investments, and adequate time and attention to change management will be important to consider.
- ✓ **Manage internal and external expectations** of change and impact so that you can sustain your investment and support for the long term.

We hope this tool has made clear that both implicit and explicit dimensions of systems change require investment. Ultimately, properly coordinated, co-owned, and co-designed investments will promote the success and sustainability of place-based systems change. The communities and residents you serve deserve no less.

## Acknowledgements

The Mathematica–Equal Measure team extends heartfelt thanks to the many individuals who contributed to the development of this suite of materials on place-based systems change. In particular, we are indebted to the P-16 Community Investment grantees and partners acting under the backbone leadership of Say Yes Buffalo (Buffalo, New York), the Public Education Foundation (Chattanooga, Tennessee), the Commit Partnership (Dallas, Texas), RGV FOCUS (Rio Grande Valley, Texas), and the Foundation for Tacoma Students (Tacoma, Washington). Backbone staff and partners in these communities generously shared their experiences and perspectives and are at the center of this work. At the Gates Foundation, we thank the P-16 Community Investment team—especially Fannie Tseng, Jean-Claude Brizard, Jill Hawley, Lindsay Hunsicker, Lu Jiang, and Christine Marson—for their support, guidance, and encouragement. We also thank the foundation’s P-16 Steering Committee members—Luzelma Canales, Aimee Guidera, Michael McAfee, Jennie Niles, and Ralph Smith—for their thought leadership in the development of this tool. At Education First, we thank Kelly Kovacic Duran, Bill Porter, Claire Takhar, and Anand Vaishnav, who provided ideas for and feedback on development and dissemination. At Mathematica, we recognize Ann Person for her thought leadership and guidance in the development of this tool; Liah Carvalho, who co-led our dissemination strategy; Jennifer Brown, for editorial support; Sarah Vienneau, for graphic design support; Sharon Clark, who led production; and staff who participated in crowdsourcing sessions on this tool. At Equal Measure, we recognize Seth Klukoff, who co-led the dissemination strategy, and staff who participated in crowdsourcing sessions. Finally, we thank the following individuals who served as reviewers for this tool: Clare Nolan, Engage R+D; Sami Berger, Curious Compass; and Blythe Butler, Atticus Insights.

### FIND & FOLLOW US:

To learn more or get in touch with the authors of this tool, email [Meg Long](mailto:Meg Long), [Wanda Casillas](mailto:Wanda Casillas), or [James Liou](mailto:James Liou).

We are actively crowd-sourcing feedback to this tool and would be happy to hear from users about their experiences and suggestions for further refinement. If you have comments, additions, or considerations for improvement, or are willing to share your experiences engaging with the tool, please contact us at [communications@equalmeasure.org](mailto:communications@equalmeasure.org).

## Appendix: Resources and Links for More Information

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## Endnotes

<sup>1</sup> We use the term *funder* to refer to individual foundation staff members. While this tool is intended for foundations and their staff, the content may be helpful for any organization that supports place-based systems change efforts, including intermediaries that provide technical support, capacity-building organizations, or those serving as backbones in communities.

<sup>2</sup> Kania, John, Mark Kramer, and Peter Senge. "The Water of Systems Change." FSG, 2018, p. 3. Available at [https://www.fsg.org/publications/water\\_of\\_systems\\_change](https://www.fsg.org/publications/water_of_systems_change). Note that the authors discuss relationships and connections as "semi-explicit," but we group these with implicit factors for simplicity.

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