

***Methods for Human Rights Grantmakers to “Measure” Systemic Change:
A Focus on Complexity & Feminist-Based Approaches***

*By Ana María Enríquez, Senior Consultant, International Network of Women’s Funds
February 19, 2014*

On January 27, 2014, sixty human rights grantmakers took part in a hands-on training institute on learning, monitoring and evaluation (LM&E) methods for ‘measuring’ systemic change. The institute prompted discussions on ‘what’, ‘if’, and ‘how’ systemic change may occur, and what philanthropic work may be more conducive to it, given that such work is about changing the systems that perpetuate injustices, is non-linear, and is contextual.

Convened by the [International Human Rights Funders Group](#) (IHRFG) and the [International Network of Women’s Funds](#) (INWF), the institute was based on interviews and research¹ by the INWF on its 46 member funds’ experience supporting women’s rights movements worldwide². It looked at their work in reframing mainstream philanthropy, including evaluation practices, and at their roles as human rights grantmakers, resource mobilizers, advocates, and capacity builders.

The institute prompted human rights grantmakers to ask themselves questions like:

- If my foundation’s main funding strategy focuses on human rights laws and policies to support systemic change, how is this helping change the systems that perpetuate injustices? (Or is it?) How can the latter be ‘measured’ and analyzed? Is our strategy achieving the intended mission? Is it enough?
- If we aim to support marginalized people to change systems of power, can we achieve our goals if we focus on organizations without representatives from marginalized populations in decision-making positions?
- Are marginalized populations meaningfully involved in our work, including program design and evaluation?
- Are our grants and strategies contributing to ‘movement-building’? If so, how does this relate to systems change?

To help address these and other questions, funders joined interactive trainings on the following three approaches that have been created and/or redefined by Global South and international women’s rights funds:

1. **The Change Matrix**, based on Ken Wilbur’s Integral Philosophy, is a gender-diagnostic framework originally developed by Aruna Rao and David Keller from Gender @ Work, and more recently adapted by Srilatla Batliwala and Alex Pittman (AWID).³ Some women’s funds and activists have further adapted the Matrix as a method to plan strategies, map data from across a portfolio of grants, and measure progress against a theory of change. Mapping can be depicted in four quadrants associated with different areas of change: (I) individual awareness, (II) equitable access to resources and

¹ [Building New Approaches to Monitoring and Evaluation from the Perspective of Women’s Funds](#) by Kimberly Keith Brown, Angeles Cabria and Seema Shah, INWF Phase 1 Report, January 2012 to February 2013. See: http://www.inwf.org/wp-content/uploads/2013/08/INWF_ME-phase-1-report-2013.pdf

² INWF Research constitutes phase I of its Learning, Monitoring and Evaluation Program supported by the Oak Foundation and Fidelity Investments Charitable Gift Program.

³ [Capturing Change in Women’s Realities](#). Srilatla Batliwala and Alex Pitman. AWID, 2010. See: <http://www.awid.org/About-AWID/AWID-News/Capturing-Change-in-Women-s-Realities>

services, (III) the legal and policy environment, and (IV) social values, practices and norms. Practitioners are currently developing a Matrix web-based application to enable digital data collection and analysis using this tool.

PeiYao Chen of the Global Fund for Women and Annie Hillar of Mama Cash, who head their foundations' LM&E programs, showcased the [application of the method](#) at the institute. Alex Pittman, founder of AVP Global Consulting, and Caitlin Stanton, Director of Partnerships and Learning at the Urgent Action Fund, provided an in-depth training. See a [video of the training here](#).

2. **Making the Case™** is a measurement and evaluation framework for planning, evaluating and aggregating social change impact, where social change results are categorized by five key shifts: in definition, behavior, critical mass, policy, and “maintaining past gains.” It is available on paper or via a [secured website](#) and includes a data analysis tool, enabling funders to compare results across organizations, issues, population served, and shifts achieved. Since the Women’s Funding Network created Making the Case™ ten years ago, the tool has been used and re-adapted by U.S. and Global South organizations, including Global South women’s funds, to fit a diversity of contexts and needs.

Cynthia Schmae Nimmo, a social change consultant for the Women’s Funding Network, shared the [Ukrainian Women’s Fund adaptation](#) of this method and led a training. See a [video of the training here](#).

3. **The Complexity & Feminist-Based Approach** is based on the ten-year evaluation of the Central American Women’s Fund (*Fondo Centroamericano para Mujeres/FCAM*). The method uses complexity and feminist concepts to assess the Fund’s philanthropic model, its resource mobilization role, and the work of its grantee-partners. It combines seven techniques (including Outcome Harvesting and Social Network Analysis) to examine systemic change processes. It analyzes patterns of relationships between the funder, its grantee-partners, and social movements at large.

Carla Lopez, Executive Director of FCAM, presented [the Fund’s application of this approach](#). The corresponding training was designed by Virginia Lacayo, Communications for Social Change and Systems-Based Expert, and conducted by Ana Criquillion, Founder and Advisor to FCAM. See a [video of the training here](#).

What these three approaches have in common is that they are values-based, participatory, non-causal, “hybrid” approaches that track long-term internal and external contributions to change. Most focus their analysis on intersectionalities, power relations, and context. And all use gender and diversity as key lenses to assess equality and multiple-identities.

No single approach, however, as Batliwala⁴ notes, can capture the total change, impact or results of a program, and as a result, many women’s rights funds use a combination of these approaches and more.

Furthermore –as Lacayo notes— if as human rights practitioners we know that systemic change is “complex, non-linear, contradictory, emergent and self-organizing,” why is it that even some human rights grantmakers end up imposing linear models for evaluation?

A Closer Look at the Complexity & Feminist-Based Approaches

⁴ [Strengthening, Monitoring and Evaluation for Women’s Rights: Twelve Insight for Donors](#). Srilatta Batliwala, AWID, 2011.

According to Lacayo, in order to better understand complex social phenomena “that involve multiple interactions between various agents and actors over time, with less than predictable outcomes,” funders need to turn to conceptual frameworks, such as **Feminism** and **Complexity Science**.

Feminism is a dynamic philosophical and political movement that has evolved across history, borders, generations, and waves of thinking, to broaden its mantra for equality to address, as Angeles Cabria notes, “a multiplicity of identities (such as gender and/or sexual identity, ethnicity, social and economic class, history, or religion, among others).”⁵ Feminist analysis can deconstruct ideologies that give different and unequal rights to men and women. A feminist approach to evaluation can help funders to gain deeper insight into their partners and grantees’ multiple identities and complex realities, and to scrutinize and question power relations and inequalities.

Complexity Science is the study of Complex Adaptive Systems. For Lacayo, ‘**Complex**’ implies diversity, multiplicity and connections. ‘**Adaptive**’ implies the capacity to change and learn. And a ‘**System**’ is a set of connected or interdependent elements. Principles of complexity science include:

- The whole is greater than the sum of its parts
- Order is emergent and self-organizing
- The system changes when it chooses to be disturbed
- Free flow of diverse information is essential for the system to evolve
- Planning the unpredictable
- Complex adaptive systems are history and context dependent⁶

Complexity science concepts are also compatible with Feminist concepts. Organizations such as the women’s rights groups and the communities and networks that the Central America Women’s Fund supports are Complex Adaptive [Feminist] Systems.

Lopez notes that they tried many LM&E methods in order to conduct FCAM’s ten-year evaluation, including linear methods imposed by donor agencies. But they found that these methods were incompatible with FCAM’s understanding of women’s movements in Central America. In contrast, the Complexity and Feminist-based approach was a breakthrough and allowed the Fund to measure and understand the interconnections of movements. In the process, it also helped FCAM learn, inform future planning, and build local Nicaraguan and Latin American capacity on complexity and feminist-based LM&E.

In a system, Criquillion explains, “each element is important, but more important [is] the connection between the elements of the system in order for the system to change.” For Criquillion, the work of grantees involves political negotiations, the need to react to unpredictable events, and an evolving society. It is the connections among groups and the strength of the networks they create that can actually change power relations and “move” political systems. If not, there is no movement, no social pressure, no social advocacy, and no systemic change.

If, like FCAM, human rights grantmakers are committed to supporting movements, complexity and feminist-based approaches offer analyses of the various agents, institutions, and their interconnections, in all their diversity and contexts. It is the interconnections of the institutions that result in the whole

⁵ Feminist approach is understood as being more value-driven, while gender is viewed as the tool and the lens for assessing equality. See Feminist Evaluation and Women’s Funds. Angeles Cabria. In INWF, June 2013. See: http://www.inwf.org/wp-content/uploads/2014/02/Feminist-Evaluation-and-Womens-Funds_Final.pdf.

⁶ What Complexity Science Teaches us About Social Change. Virginia Lacayo. In Communications Social Change Consortium, Mazi Articles. See: <http://www.communicationforsocialchange.org/mazi-articles.php?id=333>.

being greater than the sum of its individual parts. This analysis can also help identify and support groups on the margins, often overlooked by mainstream philanthropy, but who are powerful agents of creative change and leadership from the bottom up.

Finally, this analysis can put forward a radical condition, best explained by Brazilian feminist Maria Betania. She notes that feminism, as a political social movement, can help us think about democracy “not just as a political system, but as a form of organizing social life.” This allows for the possibility to imagine another world where the systems and arrangements (social, political, economic) embedded in social life –private and public— can be re-organized and radically changed.