

PRE-CONFERENCE INSTITUTE

## HOW CAN HUMAN RIGHTS FUNDERS MEASURE SYSTEMIC CHANGE?

A HANDS-ON EXPLORATION OF INNOVATIVE LEARNING,  
MONITORING, AND EVALUATION TECHNIQUES



MONDAY, JANUARY 27, 2014  
SAN FRANCISCO MARRIOTT UNION SQUARE

## DESCRIPTION

Given the diverse contexts in which human rights work takes place, how can grantmakers effectively assess their impact? A number of partners in the International Network of Women's Funds have developed and/or redefined an array of user-friendly tools for measuring social change. These Learning, Monitoring, and Evaluation (LM&E) methodologies prioritize grantees' voices, address funders' multiple roles in building movements, and track organizational and external impact.

## OBJECTIVES

In this dynamic, day-long institute, participants will:

- Build their understanding of learning, monitoring, and evaluation in human rights.
- Exchange experiences on the challenges and successes of human rights funders and practitioners in "measuring" social change.
- Learn practically, through case analyses and hands-on training, about three LM&E approaches: Change Matrix; Complexity and Systemic Change Method; and Making the Case.

## LEARNING, MONITORING AND EVALUATION METHODOLOGIES

**The Change Matrix** is an adaptation of a diagnostic framework developed by Gender at Work, an international collaborative that works with organizations to facilitate gender and organizational change processes. Funders and activists use the Change Matrix to plan strategies, to map data from across a portfolio of grants, and to measure progress against a theory of change. The Change Matrix enables mapping of both strategies and data in four quadrants associated with different areas of change: individual awareness; equal access to resources and services; the legal and policy environment; and social values, practices and norms. Some practitioners are currently developing a Change Matrix web-based application for digital data collection and analysis.

**The Complexity and Systemic Change Method** assesses a fund's philanthropic model, the work of its grantee-partners, and the grantee-partners' resource mobilization achievements and challenges. This method combines seven techniques to examine social change processes and analyze patterns of relationships between the funder, its grantee-partners, and social movements at large. It is based on the Central American Women's Fund's (CAWF) evaluation of its first 10 years of work. This method applies complexity theory (the study of a complex system) and feminist theory (applying principles of feminism to other fields of study, such as philosophy and politics, to understand the nature of gender inequality).

**Making the Case** is a measurement and evaluation framework for planning, evaluating, and aggregating social change impact. It captures changes according to five indicators: shifts in expectations, definitions, behavior, policy, and "maintaining past gains." While using components of linear logic frameworks, this method contains educational components that build the capacity of organizations to understand how social change results. The Making the Case tool was created by the Women's Funding Network and has been modified and re-adapted by several Global South women's and other funds to fit diverse contexts and needs.

## AGENDA

8:00-8:30 am

### BREAKFAST AND REGISTRATION

8:30-9:00 am

### WELCOME

- Emilienne de León Aulina, Executive Director, International Network of Women's Funds
- Azeen Salimi, Program Director, Education and Convening, International Human Rights Funders Group

### INTRODUCTIONS ORIENTATION

Institute Facilitators:

- Annie Hillar, Learning and Evaluation Specialist, Mama Cash
- Ana María Enríquez, Senior Consultant and Coordinator, Learning, Monitoring and Evaluation, International Network of Women's Funds

Institute Sponsors:

- Florence Tercier Holst-Roness, Director, Issues Affecting Women Program, Oak Foundation
- Maitri Moraji, Program Officer, Women's Rights Program, Wellspring Advisors

9:00-9:50 am

### FRAMING LM&E IN THE CONTEXT OF HUMAN RIGHTS GRANTMAKING

Participants will engage in an interactive discussion that will introduce the core concepts and issues related to LM&E and impact assessment for human rights funders.

*What does learning, monitoring and evaluation mean and what general LM&E approaches exist in the field? What are some of the key issues/trends/tensions that human rights funders and practitioners face in relation to monitoring and evaluation? How are human rights practitioners and funders – including women's funds – developing and adapting tools to “measure” social change?*

- With Alex Pittman, Founder, AVP Global Consulting

9:50-10:00 am

### BREAK

## AGENDA CONTINUED

### 10:00 am-12:00 pm INTRODUCTION TO THREE LM&E METHODS THROUGH CASE ANALYSES

Through a “Share and Shift” format, international human rights funders and practitioners will provide background on each of the three LM&E techniques – the Change Matrix, the Complexity and Systemic Change Method, and the Making the Case tool – and explain how they have adapted them to their human rights work.

Each of the three methods will be explored in greater depth during the training sessions in the afternoon. Participants will have the opportunity to explore each of the three methods before deciding which training session they would like to attend.

#### Savoy

##### The Change Matrix

- PeiYao Chen, Director, Learning, Evaluation, and Impact, Global Fund for Women
- Annie Hillar, Learning and Evaluation Specialist, Mama Cash

#### Russian Hill

##### Complexity and Systemic Change Method

- Carla Lopez, Executive Director, Central American Women’s Fund

#### Telegraph Hill

##### Making the Case

- Natalia Karbowska, Board Chair, Ukrainian Women’s Fund

### 12:00-1:00 pm LUNCH

## AGENDA CONTINUED

1:00-4:15 pm

### INTERACTIVE, IN-DEPTH TRAININGS ON THE THREE LM&E METHODS

Participants will choose to attend a training session on one of the three LM&E methods. Participants in all trainings will engage in web-based and hands-on demonstrations, create sample tools, and take part in concrete exercises.

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#### Savoy

##### **The Change Matrix**

Funders and activists use the Change matrix to plan strategies, map data from across a portfolio of grants, and measure progress against a theory of change.

Participants in this workshop will learn practical applications of the Change Matrix for grantmaking evaluation and organizational learning by creating a sample map. In addition, the group will preview a web-based application for digital data collection and analysis and have the opportunity to contribute feedback to its development.

Trainers:

- Alex Pittman, Founder, AVP Global Consulting
- Caitlin Stanton, Director, Learning and Partnerships, Urgent Action Fund

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#### Russian Hill

##### **The Complexity and Systemic Change Method**

This technique analyzes patterns of relationships between funders, their grantee partners, and women's (or other social) movements at large. It is based upon complexity and feminist theories.

Participants in this training will learn more about one of the method's seven tools, the Social Network Analysis tool, which maps the relationships between individuals and organizations, and can be used to measure social capital (the value that an individual gets from and provides to the social network).

Trainers:

- Ana Criquillion, Consultant and Founder, Central American Women's Fund
- Virginia Lacayo, Communication for Social Change and Leadership Consultant

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#### Telegraph Hill

##### **Making the Case**

Making the Case is a measurement and evaluation framework for planning, evaluating, and aggregating social change impact. It captures changes according to five shifts: in engagement, definitions, behavior, policy, and "maintaining past gains."

Participants in this training will learn, through a series of practical exercises, how to apply and analyze core concepts of this method – social change shifts; accelerators and inhibitors; and moving from outputs to outcomes – in their own philanthropic work in order to better communicate the long term impact they are making.

Trainer:

- Cynthia Schmae Nimmo, Philanthropic Advisor and Social Change Strategist

4:15-5:00 pm

### APPLYING THE KNOWLEDGE

Participants will reconvene to discuss challenges and opportunities they foresee when applying these methods in their work.

5:00 pm

### WRAP-UP AND EVALUATION

## ADVISORY COMMITTEE

Ana María Enríquez, Senior Consultant and Coordinator, LM&E, International Network of Women's Funds

Annie Hillar, Learning and Evaluation Specialist, Mama Cash

Alex Pittman, Founder, AVP Global Consulting

Emilienne de León Aulina, Executive Director, International Network of Women's Funds

Florence Tercier Holst-Roness, Director, Issues Affecting Women Program, Oak Foundation

Maitri Moraji, Program Officer, Women's Rights Program, Wellspring Advisors

## INSTITUTE SPONSORS



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