Tanoto Foundation

Centre for Evidence and Implementation

# The Evidence Behind Better Philanthropy

## Insights on the Monitoring, Evaluation, and Learning Approaches of Leading Global Foundations

August 2025

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## About Tanoto Foundation

At Tanoto Foundation, we unlock human potential, help communities thrive, and create lasting impact. Founded in 1981 by Sukanto Tanoto and Tinah Bingei Tanoto, we are an independent family foundation that believes in providing every person with the opportunity to realize his or her full potential. To do so, we catalyze systems change in education and healthcare. Our approach is impact-first, collaborative, and evidence-based. We invest for the long term and strive to develop leaders who can drive sustained, positive outcomes.
More information is available at www.tanotofoundation.org/en/.

## About CEI

The Centre for Evidence and Implementation (CEI) envisions a world where people can improve their lives through support that is equitable and effective. We are a global research and advisory organization dedicated to using the best evidence in practice and policy to improve the lives of people facing adversity. Established in Australia in 2016, CEI is a multi-disciplinary team across five offices in London, Melbourne, Oslo, Singapore, and Sydney. We work with our partners, including policymakers, governments, practitioners, program providers, organization leaders, and funders in four key areas of work:

- Understanding and making sense of the evidence base.
- Generating evidence through trialing, testing, and evaluating policies and programs to drive more effective decisions and deliver better outcomes.
- Developing methods and processes to get high-quality evidence into policy and practice.
- Building cultures for evidence use.

## Acknowledgements

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Sweet & Perfect

# Foreword

How effectively is the philanthropic sector using evidence to evaluate and improve its impact? This critical question demands urgent attention as philanthropic organizations navigate a time of profound transformation. With increasing resources invested to tackle the world's most complex social challenges, the necessity to demonstrate real, sustainable results has never been greater. Foundations must move with purpose—not only to fund initiatives but also to embrace measurement and evidence as a compass for decision-making and contributing to meaningful social change.

The study you're about to read offers a timely contribution. We embarked on a journey to provide a comprehensive analysis of how leading global foundations practice monitoring, evaluation, and learning (MEL), a much-discussed but elusive cornerstone of effective philanthropy. Through in-depth interviews with representatives from 11 leading foundations and an extensive review of foundation literature, this study illuminates the diverse ways foundations are navigating the evolving landscape of evidence use in philanthropy.

One of the most compelling aspects of this study is its global perspective. While it draws insights from some of the largest and most established foundations, it also incorporates lessons from emerging philanthropic regions, particularly Southeast Asia. As philanthropy in this region rapidly matures and adopts evidence-based approaches, the experiences documented here offer critical lessons for foundations worldwide, especially those seeking to maximize their impact in diverse and complex contexts.

As such, this study is more than just an academic exercise; by sharing the lessons learned from real-world practice, it aims to inspire foundations with insights and key trends reshaping how foundations view and use evidence.

First, the study introduces the concept of "SMEL" — an integrated approach that combines strategy with traditional monitoring, evaluation, and learning functions. This marks a shift from viewing evidence as tool for accountability to seeing it as a driver of strategic decision-making. In this new paradigm, the emphasis is on using evidence that is not just rigorous but also "useful and used" — ensuring that it actively informs decisions and fosters adaptive learning throughout the life of a program.

A key revelation is that leading foundations are moving away from a narrow focus on impact toward a more holistic understanding of their contributions within complex systems, accompanied by increasing recognition that contribution matters as much or more than attribution. In a world where social change is rarely linear, and results often emerge over time through complex interactions, foundations are now focused on understanding how they contribute to broader outcomes rather than trying to pinpoint precisely where their influence begins and ends. This shift reflects an evolving understanding of how foundations can drive systemic change and contribute to larger, more interconnected efforts.

Equally important is the recognition of the critical role of organizational culture in enabling effective MEL. The study finds that the most successful foundations have embedded a culture of learning and adaptation. These foundations prioritize continuous learning, encourage open dialogue around what is working and what isn't, and are committed to using evidence to improve their work.

As the philanthropic sector continues to evolve, foundations have a unique chance to collaborate and share learnings more openly. The study advocates for greater cross-sector dialogue, urging foundations to create spaces for knowledge exchange that go beyond traditional silos. It also calls for continued methodological innovation, with a particular emphasis on finding ways to strengthen evidence use in emerging markets, where philanthropic infrastructure and practices are less developed but hold great potential for impact.

This report does not claim to have all the answers, but we hope it inspires reflection, discussion, and collaboration. By aligning on shared principles and learning from each other's experiences, we can build a more evidence-informed sector that is better equipped to tackle the world's most pressing challenges.

**Belinda Tanoto**
Member, Board of Trustees
Tanoto Foundation

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# Introduction

**The philanthropic sector is modest in scale compared to other industries. Individual philanthropic organizations tend to be small and relatively young in many regions. Furthermore, the concept of a philanthropic ecosystem is often nascent and still evolving. Traditional private charitable giving is gradually transforming into more public, strategic, and institutionalized models of philanthropy.**

Thus, it is unsurprising that the norms of philanthropic practice—how to "do" philanthropy well—are also not well-established compared to the norms of other sectors. Business and policy schools support professionals entering companies and government to learn how to run organizations in accordance with leading-edge theory and practice. By comparison, the philanthropic practice continues to evolve, with a limited "learning ecosystem" characterized by scant research evidence and fewer platforms or institutions to share insights on what works.

This study on global foundations' monitoring, evaluation, and learning (MEL) practices is part of broader efforts to codify and share practices in the philanthropic sector. The objective is to make this sector more effective in its ways of working and, in turn, enhance its impact.

## Philanthropic Practice in MEL

A 2016 report by Oak Foundation shows that foundations are spending more resources and staff time on evaluation than they did in the past, with growing recognition of the importance of purposeful learning.[1] As funders engage with pressing social, economic, and environmental challenges in an increasingly complex ecosystem, they recognize the need to set aside resources to make sense of their impact.

A key area of interest in philanthropic practice is how philanthropy can use evidence to be more effective. This insight should enable foundations to assess better how well they achieve their objectives and integrate these findings into their operations. There is strong sector interest in learning about MEL approaches. However, limited insights have been published in this area. Existing research in the philanthropic sector often focuses on "what" interventions achieve, with little emphasis on "how" to run effective philanthropic organizations that can best achieve their mission. The available evidence also disproportionately represents practice within US institutions, given the size and maturity of its philanthropic sector.

Available research indicates there is an opportunity to improve philanthropic MEL practice. A 2016 study by the Center for Effective Philanthropy and the Center for Evaluation Innovation on foundation evaluation practices found that more than 80% of 127 respondents representing foundation leaders said it was challenging to produce evaluations that provided useful lessons. Nearly two-thirds also believed their foundation did not invest enough in learning processes or events involving grantees or other external stakeholders.[2]

Foundations often use grantees' performance as proxies for their own performance while paying less attention to their internal processes, practices, and decisions and how these influence outcomes.[3] Beyond this, foundations are moving beyond minimum standards of accountability for reporting purposes toward assessing whether social investments create transformative value for society. Therefore, they require evaluation approaches that require more sophisticated methods than what simple, linear tools and reasoning typically provide.[4]

## Purpose of This Study

Tanoto Foundation, an independent philanthropic organization committed to improving lives through quality education and early child development, commissioned this study. The Centre for Evidence and Implementation (CEI) developed the work alongside the Tanoto Foundation's MEL leadership, co-developing research priorities and collaborating on data collection and analysis.

The study's objective is to contribute to the evidence base on MEL practice, capturing elements of how leading global foundations leverage evidence from MEL to advance their missions. The authors and commissioners are particularly interested in advancing practice within Southeast Asia, where Tanoto Foundation is committed to supporting the development of the philanthropic ecosystem. As such, this report is intended as a public good.

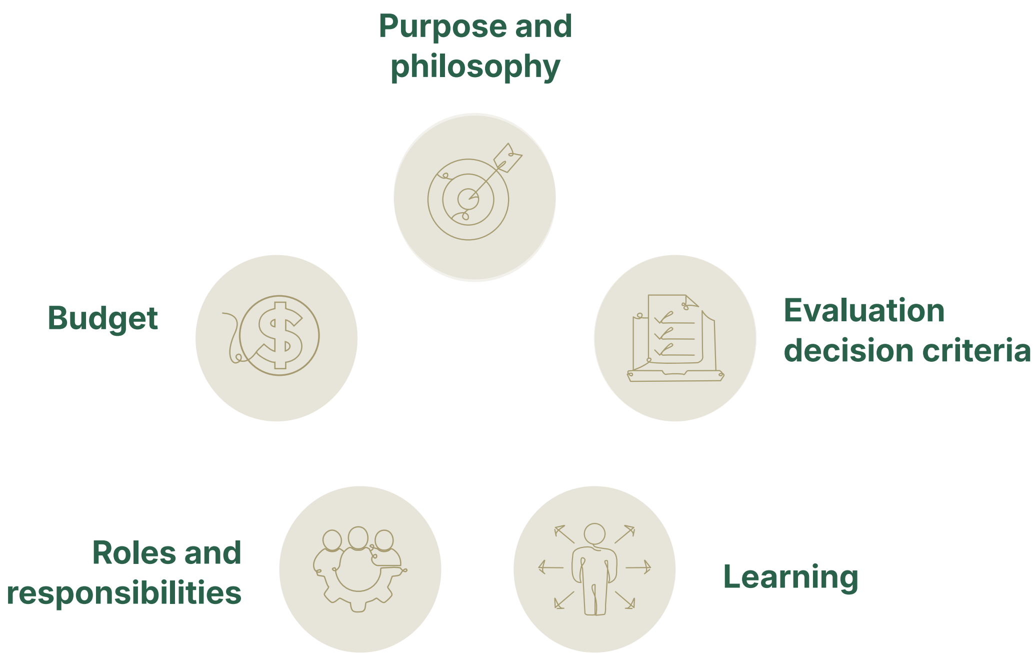
[1] Cascadia Consulting Group, Inc. for Oak Foundation (2016) Planning for monitoring, learning and evaluation at small- to medium-sized foundations: A review.
[2] Buteau, E., Coffman, J., et al. (2016). Benchmarking foundation evaluation practices. Center for Effective Philanthropy and Centre for Evaluation Innovation.
[3] Pole, N. (2022, July 5). Measuring and accounting for 'success' in the charitable and non-profit sector. The Philanthropist Journal.
[4] Bare, J. (2010). Philanthropy, Evaluation, Accountability, and Social Change. The Foundation Review, 1 (4), 84-104.
Hewlett Foundation, and W.K. Kellogg Foundation.

## The findings of this study are based on two data sources:

**Interviews with 11 global foundations**
selected by CEI and Tanoto Foundation (see table below). Selection criteria included their annual giving, portfolio priorities, geographic reach, and evidence orientation. The selected foundations have either a regional or global portfolio and a reputation for commitment to evidence use.

**A literature review of 44 documents on MEL,**
including academic publications, foundation publications, grey literature, and 16 publicly available MEL policies.[5]

The study prioritized five MEL domains to be investigated, seeking to understand how leading foundations defined, structured, and supported MEL. These included:




This report presents 10 thematic findings within and across the above domains. Appendix A describes the study methods, including the selection process for the shortlisted foundations, what the literature review involved, and how CEI and the Tanoto Foundation analyzed the findings.

[5] Foundations with published MEL policies reviewed for this report include the Adaptation Fund, Bill & Melinda Gates Foundation, California Wellness Foundation, David and Lucile Packard Foundation, Doris Duke Charitable Foundation, Duke Endowment, Ford Foundation, James Irvine Foundation, John D. and Catherine T. MacArthur Foundation, Kansas Health Foundation, Paul Ramsay Foundation, Rockefeller Foundation, Skillman Foundation, Wallace Foundation, William and Flora Hewlett Foundation, and W.K. Kellogg Foundation.

## Participating Foundations

| | Foundation | Foundation Description | Interviewees |
|---|---|---|---|
| 1. | Jacobs Foundation | A private foundation dedicated to quality child learning and education in Switzerland and internationally. | Donika Dimovska, Chief Knowledge Officer<br><br>Samuel Kembou (PhD), MEL Lead<br><br>Hallie Preskill (PhD), Evaluation and Learning Consultant |
| 2. | Central Square Foundation | A non-profit organization dedicated to enhancing the learning outcomes of all school-going children across India through system-led reforms. | Akashi Kaul (PhD), MEL Lead |
| 3. | LEGO Foundation | A philanthropic organization dedicated to promoting learning through play. | Joe Savage, Head of Strategic Portfolio Impact |
| 4. | Co-Impact | A global organization focused on building just and equitable systems. | Varja Lipovsek (PhD), Director- Learning, Measurement & Evaluation |
| 5. | Gates Foundation-India | A private philanthropic organization aiming to create measurable impact in the fight against poverty, disease, and inequity around the world. | Suneeta Krishnan (PhD), Deputy Director-Strategy Planning Management and Measurement Learning & Evaluation |
| 6. | Children's Investment Fund Foundation | An independent philanthropic organization focused on systemic change. | Corina Campian, Senior Manager-Evidence, Measurement & Evaluation |
| 7. | Lemann Foundation | A Brazilian non-profit family organization dedicated to improving education and fostering leadership in the country. | Daniel De Bonis (PhD), Director of Knowledge, Data & Research |
| 8. | Mulago | A private foundation focused on investing in charities and philanthropic opportunities that have the highest impact. | Dr. Kristin Gilliss Moyer, Chief Operating Officer & Head of Portfolio |
| 9. | Yayasan Hasanah | An independent grant-making foundation, the philanthropic arm of the Khazanah Nasional, the sovereign wealth fund of Malaysia. | Hwa En Ning, Senior Manager-Monitoring, Learning, Evaluation & Knowledge<br><br>Kuan Ming Foong, Officer-Monitoring, Learning, Evaluation & Knowledge |
| 10. | Van Leer Foundation | An independent Dutch foundation that funds and shares knowledge about work in early childhood development. | Darja Dobermann (PhD), Monitoring, Evaluation and Learning Expert |
| 11. | Porticus | A global foundation focused on creating a just and sustainable future where human dignity flourishes. | Dennis Arends, Senior Analyst (Strategy and Learning) |

# A Note on Terminology

This study uses the phrase "grantees" to refer to organizations receiving funding, technical assistance, or both from philanthropic institutions. Some participating foundations use the terms "partner" or "funded organization," but in the interest of simplicity, the report refers to them as "grantees."

This study uses "monitoring, evaluation, and learning" or "MEL." Other phrases, such as measurement, learning, and evaluation (MLE), monitoring and evaluation (M&E), and monitoring, evaluation, accountability, and learning (MEAL), are also common. The report does not differentiate between MEL and these other terms to avoid confusion. Drawing on the M&E definitions from the Gates Foundation,[6] and the L definition from the Global Schools Forum, the report defines MEL as follows:[7]

## Monitoring

A process of collecting, analyzing, and using data to ensure compliance and improve performance, comprised of both qualitative and quantitative data collection methods. Monitoring tells us whether milestones and basic targets are being met and whether critical activities are proceeding as planned.

## Evaluation

An investigation into whether, why, and how results are or are not achieved. Evaluation can help the foundation answer key questions about grants, initiatives, and strategies.

## Learning

Learning is the use of information from monitoring and evaluation to make better decisions now and in the future. These insights enable improvement to implementation and future initiatives.

[6] Bill & Melinda Gates Foundation. Glossary and Terminology. https://docs.gatesfoundation.org/documents/glossary_and_terminology.doc
[7] Global Schools Forum & Better Purpose. Monitoring, Evaluation and Learning (MEL) Framework–Scale Toolkit. https://globalschoolsforum.org/sites/default/files/2023-12/mel_framework_-_explanation_0.pdf


Legenda
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# 02 Key Finding

**This study identified 10 key finding about MEL practice.**

## 2.1. "It's not MEL, it's 'SMEL'."

In several of the participating foundations, learning from evidence is deeply integrated into strategic decision-making and embedded in learning cycles and strategy development. SMEL, a term first introduced to the research team by Dennis Arends at Porticus Foundation, stands for *strategy,* monitoring, evaluation, and learning, which integrates strategy into the regular MEL function. In short, SMEL leverages evidence to deeply inform strategy. Evidence is put to work to understand whether the intended impact is being achieved and to support course correction as institutions learn.

This shift to placing evidence at the heart of decision-making is crucial because it is not a well-established way of working in philanthropy. MEL teams and budgets are often supplementary to core programming budgets and siloed from daily decision-making. However, "SMEL" captures the essence of a strategic approach to philanthropy, focusing on examining the difference a foundation is making through leveraging evidence to understand outcomes. Many foundations we spoke to describe their MEL work as being deeply informed by the key strategic questions of their institutions and the sectors where they seek to have influence.

For example, at the Gates Foundation–India, the MEL team "holds the pen first" on organizational strategy development. Previously, the MEL team operated separately from the strategy and portfolio management functions, leading to high transaction costs. The MEL head was responsible for conveying evidence to the strategy team, helping them to understand what was necessary for strategy. Likewise, for the program team, the MEL head was responsible for conveying insights from external evaluators. This separation created multiple barriers to applying evidence to learning.

Changing this approach to merge MEL with strategy and portfolio management has meant more opportunities for making linkages between evidence, strategy, and portfolio management in the context of routine cluster meetings and retreats. It has also fostered a deeper understanding in the strategy team of how to interpret and use evidence in developing and refining strategies.

The MEL leaders at the foundations described their efforts to integrate learning and insight into decision-making at all levels, consistently stressing the theme of using learning to inform strategy. This affected the type of research questions they asked to ensure they aligned with the foundation's strategic questions and the methods, timing, and format they used to answer them.

> So how do we make sense of what we're getting from all these different studies or all of these different grants? How do we use it? How does that fit into decision-making? . . . How do we summarize or synthesize that at different levels of the organization, particularly at the portfolio level, et cetera?
>
> **—Joe Savage, LEGO Foundation**

## Below are examples of how evidence plays a critical role in influencing strategy within the foundations.

- Dr. Samuel Kembou of the Jacobs Foundation described the goal of MEL as "to design, execute, and refine their strategy in a sector of competing requests and several opportunities to digress from the initial strategy." MEL keeps them on target and is their "companion in learning and iteration." At times, learning insights have led to difficult decisions about program continuation.

> Learning is really elevated at the level of strategy . . . I think we really stand behind what we learn, and we act on it.
>
> **—Donika Dimovska, Jacobs Foundation**

- Dr. Kristin Gilliss Moyer at Mulago described insights from their MEL work that had significantly shaped the foundation's strategy. For example, after cumulative evidence demonstrated that their investments in smallholder agriculture have found it hard to move people out of poverty if farm sizes were too small, the group looked at other ways of improving rural livelihoods.

- Though not all the foundations have a centralized MEL function, Dr. Daniel De Bonis of the Lemann Foundation believes that one enables "collective intelligence" directly relevant to decision-making. At Lemann, a centralized MEL function reduces information loss and provides a more coherent approach with integrated policies.
- Several foundations employed a Theory of Change (ToC) approach to guide strategy and alignment. For example, Yayasan Hasanah refreshed their ToC at the organizational level, which served as the basis for tracking their results. The Van Leer Foundation refreshed their organizational strategy with a ToC approach and strategically cascaded down the eight outcomes in its ToC to individual theories for each program portfolio. It then tested each to determine whether changes had occurred as intended, adjusting along the way.

> We want to derive learnings to make strategic decisions, so we assess what we have done, what's working, what works where, or with who best, and what are the reasons for that. Along the way we can use those learnings to course-correct, and then of course at the end to evaluate how we did against the ToC. So that's the bigger picture.
>
> **—Kuan Ming Foong, Yayasan Hasanah**

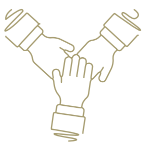
## 2.2. MEL Teams Play a "Critical Friend" Role

Multiple foundations (including the Gates Foundation–India, CIFF, and Porticus Foundation) used the term "critical friend" to describe how they worked with the program teams. Most interviewees described this dynamic in similar terms.

Across the foundations, MEL teams work closely and collaboratively with their board, program, and grantee counterparts. They recognize that MEL cannot function effectively or add value without extensive knowledge of what happens on the ground or the identification of key learning questions that determine whether a program delivered its intended outcomes. MEL teams bring diverse perspectives based on their role and technical capabilities. This sharpens programs, measurements, and insights.

> We are the program team's critical friend. So, we're friends, we work as partners, and we have empathy, and we want our program team to succeed. But at the same time, we bring a critical perspective. We pressure-test, we debate, we question.
>
> **—Dr. Suneeta Krishnan, Gates Foundation–India**

MEL teams were grappling with integrating this "critical friend" function and mindset into ways of working, undertaking diverse change processes to integrate MEL thinking and practices in programmatic work. Some foundations discovered that by merely working closely and continuously with the program teams, their program teams had begun "taking on a similar critical lens" in how they approached their work. Some foundations shifted to "joint ownership" of MEL, avoiding an "audit" model. Others have adopted a more collaborative approach to making programming decisions involving MEL and program teams, where MEL is a co-equal partner compared to the past, in which MEL played an advisory role. These experiences highlight the diverse ways the MEL teams have worked collaboratively as critical friends to contribute to institutional learning and practice.



> We have a principle of collaboration, not control, so we don't want the MEL to feel burdensome to our portfolios . . . we wanted [the process] to really feel like a co-creation, collaboration process that benefits them.
>
> **—Dr. Darja Doberman, Van Leer Foundation**

## 2.3. Methodological Flexibility Is Essential

There is sometimes a conception that the most rigorous methods (for example, an RCT) and quantitative data are "best." However, all the foundations agreed that the most rigorous methods are not always the most appropriate and emphasized that foundations should take a flexible approach in choosing evaluation methods. Without exception, they stress the importance of taking diverse approaches and operating with a "fit-for-purpose" mindset.

According to Dr. Samuel Kembou, the Jacobs Foundation is "driven by the question itself, not necessarily by the method . . . we are not married to any of the approaches." Dr. Suneeta Krishnan of the Gates Foundation–India similarly noted that it was important to "match the method with the purpose."

> The starting point is the research question . . . that's what would inform the choice of methods.
>
> **—Corina Campian, CIFF**

Each foundation advocated for a mixed-methods approach to evaluation, drawing on multiple data collection methods and sources. For example, formative and developmental evaluations are valuable research designs for new programs. They also reject any notion that quantitative data is inherently superior, emphasizing that qualitative data is highly useful or even preferred for multiple purposes, such as understanding the mechanisms of change in challenging domains (e.g., systems change or policy advocacy) or interpreting results within specific implementation and environmental contexts.

These findings mirror the literature review, which similarly emphasized the need for flexibility in matching the evaluation methodology to the evaluation's purpose, context, and audience and the need for multiple methods and sources. The literature review further highlighted that the decision criteria of what and how to evaluate varies from foundation to foundation and depends on context.

Not everything can be evaluated in the context of finite resources (e.g., time, human, funding). Within the 16 public MEL policies reviewed for this study, the most frequently mentioned criteria for deciding which programs to evaluate were:

- The program is a pilot or innovative program.
- The program is a high priority, central to the foundation's reputation, or poses a high strategic risk.
- The program size is large as measured by the monetary investment or operational scale.
- A significant learning gap exists that the evaluation can fill.
- The program has significant potential to be scaled or replicated.

Interviewees consistently stressed that it is more cost-effective to invest in evaluating promising interventions where the learning need is more significant or for which strong evidence is lacking. For interventions whose impact is supported by solid evidence, targeted evaluations investigating aspects of delivery, implementation, and adjustment of program content may be more appropriate.

The Van Leer Foundation, for example, asks itself, "Does it need to be evaluated?" and "Does it need to *continue* to be evaluated?" Mulago likewise chooses when and how to evaluate based on what evidence already exists. As stated by Dr. Kristin Gillis Moyer, "We're doing a rigorous assessment of every organization . . . What is the body of evidence in that sector that's already known that they don't need to prove? Where are the gaps they *do* need to prove? . . . [It's] how their solution fits in."

Joe Savage at the LEGO Foundation emphasizes proportionality and intentionality in deciding the amount, type, and value of evaluation effort, seeking to right-size resources to answer questions of strategic importance. It is considering structuring MEL using a strength-of-evidence model, whereby the evaluation funding and methodology are determined based on existing evidence from previous evaluations of the same or similar programs. Programs with strong evidence may not require significant investments in evaluation. Instead, resources are better invested in program monitoring or supporting smaller, targeted evaluations of specific innovations. Larger evaluation investments may be needed where the evidence is less certain and larger evidence gaps exist.

> Maybe we're seeing something that sounds promising, but the evidence isn't strong and that starts to give us a pointer in terms of where we might want to go next, in terms of where we make our evidence investment.
>
> **—Joe Savage, LEGO Foundation**

Certain foundations emphasized the usefulness of monitoring data instead of evaluations to gain learning insights (e.g., Mulago) and are, thus, working on strengthening their monitoring systems (e.g., Central Square Foundation). That said, the literature review revealed a significant gap in understanding foundation monitoring practices and their role in measuring program results; the literature overwhelmingly focuses on evaluation practices with comparatively little focus on monitoring practices. This lack of emphasis might be a missed opportunity for foundations to learn and adapt strategies over time.

The foundations' emphasis on "good enough" evidence also depends on context and limitations. In complex systems and depending on geography, there are certain domains, topic areas, intervention types, and population groups where access to evidence presents a significant challenge. For example, Dr. Akashi Kaul of Central Square Foundation reinforced the imperative to consider the context in deciding on the evaluation method, noting that representative sampling is a challenge when the state lacks the requisite demographic data and the capacity to collect it, such that "[g]ood evidence often turns out to be 'good enough' evidence given the context, limitations, and space that I'm operating out of."

> The context matters so much . . . we try and remind ourselves . . . what is the context . . . and how it is different so that we're not too reductionist about it [differences in outcomes between organizations].
>
> **—Dr. Kristin Gilliss Moyer, Mulago**

Although the participating foundations agree that diverse contexts require diverse methods, Mulago noted that the evidence bar that a program must hurdle increases incrementally over time to enable a rigorous demonstration of effectiveness. While less rigorous methods may be acceptable initially, Dr. Kristin Gilliss Moyer says that at Mulago, "Over time, [merely being] 'persuasive' is not enough . . . At some point, we do expect evidence to be rigorous."

Participating foundations agree that methodological rigor is multifaceted, encompassing the credibility and reliability of information and conclusions. Dr. Suneeta Krishnan of the Gates Foundation–India noted, "We recognize that in most of the cases, the kinds of contexts we work in, RCTs are not feasible, nor would they be actually the best form of evidence." Rigor involves asking appropriate questions, involving relevant stakeholders, using credible methods, examining diverse evidence sources, and carefully analyzing data.

Different methods also have different standards for rigor. Quantitative studies emphasize sample construction and size, while qualitative studies emphasize talking to the right people and using unbiased questioning techniques. Rigor in both cases requires attention to instrument design guided by clear research questions and effective quality control measures.

## 2.4. Evidence Must Be "Useful and Used"

Foundations highlighted that MEL's usefulness is tied to its ability to support decision-making and learning. The phrases "timely," "relevant," "actionable," and "useful" came up frequently in interviews. A common risk that needs managing is that evaluation findings are not available in a timely manner or that the insights generated are not relevant or useful to inform decisions.

> Something that's very important for us is really trying to provide information that's relevant for decision-making, that's really actionable.
>
> **—Dr. Daniel De Bonis, Lemann Foundation**

> If we have to prioritize [which studies to evaluate], the principle of timeliness and pathway to decision would be applied.
>
> **—Dr. Samuel Kembou, Jacobs Foundation**

The Gates Foundation–India cautions against prioritizing study rigor over the relevance and timeliness of findings. Dr. Suneeta Krishnan says, "You can do the most perfect, so-called 'rigorous' RCT and have completely missed out on your window of opportunity. [It might not be] related [or] relevant to the real-world implementation context. And then, you know, the rigor is . . . useless."

Ensuring the relevance of MEL starts as early as the study design phase. Corina Campian at CIFF noted that it is essential to "make sure that we design something that will be useful and used in the end." Investing time at the beginning of an evaluation to fully understand the program can significantly enhance the benefits of the evaluation, in part by helping to clarify the usefulness of the findings. Evaluations are expensive, and without careful planning, including their timing, the value of their learning may not justify their cost.

## 2.5. A "Learning Culture" Is Essential

In a September 2024 webinar, Dr. Suneeta Krishnan at the Gates Foundation–India described her primary lessons learned about the role of evidence professionals in philanthropy:

> What I've learned over the last eight years of doing evaluation at the foundation is to stay really humble and stay really curious.
> Earlier on, I came in as the evaluator and passed judgment . . . [but in complex systems work] the devil is in the details, the answer is almost always 'it depends', recognizing that I as the evaluator only have about 20% of the insight that my colleagues [working on the programs will have]. That is what animates me.
>
> **—Dr. Suneeta Krishnan, Gates Foundation–India**

Dr. Hallie Preskill, an Evaluation and Learning Consultant working alongside the Jacobs Foundation, echoed the importance of having humility and a learning orientation. In observing the foundation's efforts to be a learning organization, she described the success of her MEL colleagues as a function of both deep technical expertise and the way they interacted with others:

> I would add humbleness [as a critical success factor] because I think they have done such a great job of working with the program teams who are not all ready at the same time to engage in this process . . .
>
> [They] are listening—good listeners—and patient. And [they] try to provide support and bring them [their colleagues] along the way. So, I think that's super important: you can't bulldoze through this process.
>
> **—Dr. Hallie Preskill, Jacobs Foundation**

Traditional MEL mindsets may confine the purpose of monitoring and evaluation to ensuring "accountability" for funds distributed. While this remains an essential reason for doing MEL, the foundations refer to MEL for accountability as "table stakes"—necessary but insufficient for their objectives.

Several foundations described how their MEL approaches have evolved from a top-down approach to one that aims at informing learning and action involving diverse foundation members, including the board, programs, and grantees. Joe Savage at LEGO observed this change, stating: "I think the sector is moving in terms of how it conceives MEL from one which maybe 10, 15, 20 years ago was quite a controlling management tool, to one that is more . . . around supporting adaptation and supporting improvements."

Learning is a mindset, the *thinking* that informs the *doing.* This theme of a culture or mindset for MEL—not just within the MEL team itself but across the foundation—was significant across the interviews. At the Lemann Foundation, Dr. Daniel De Bonis used the term "evaluative culture" to describe this way of working (and the MEL team's role in cultivating it):

> Something we learned in this process is how important [it is] for our work really to help develop an evaluative culture and the data-driven culture. And not just doing the work and bringing the data . . . [but] there's a kind of mindset that really needs to be there for people to really make the best use of what we're doing.
>
> **—Dr. Daniel De Bonis, Lemann Foundation**

At Co-Impact, Dr. Varja Lipovsek echoed the importance of a learning mindset: "Any organization, no matter how big or how small, is better if they have a learning and a measurement mindset, and if they are comfortable with a varied set of tools that unpack different levels of questions . . .  I think there's so many ways of learning and asking questions that are appropriate to different contexts and different problems, and I think having a variety of approaches that help you learn, adapt and improve . . . [that's the] learning mindset."

Mulago does not have a dedicated MEL unit (it had approximately a dozen staff at the time of writing) but rather a set of program leads who co-own the MEL function, ensuring its integration into core business functions. Mulago's Chief Operating Officer described the foundation as actively recruiting staff candidates who demonstrate "investigative curiosity" that includes a facility with data and numbers, what she described as a journalistic curiosity about their grantees, and the ability to sense-make a variety of data.

Although the Jacobs Foundation values technical skillsets, it sees hiring based on technical expertise as insufficient to cultivate a learning culture. Instead, Chief Knowledge Officer Donika Dimovska stressed the need for a mix of skills: "When you hire for learning and evaluation teams, you're hiring for this kind of unique skillset, almost like a unicorn skillset of relationship building, mental agility, strategic thinking, analytic thinking. All of these things are not easy to find."

> This [learning] is painstaking work . . . it's continuous work and it's almost like investing in self-reflection, self-awareness, ability to think. It's a mindset thing, it's not a technical thing and that's the hardest part to this process.
>
> **—Donika Dimovska, Jacobs Foundation**

The foundations described how they were working to build this learning culture over time, describing their work as an ongoing process of intentional change, requiring perseverance by the MEL team to engage and facilitate discussions to build the foundation's capacity to use data to inform. Joe Savage spoke about how the LEGO Foundation aims to "get the right people at the right moments in time to discuss and reflect on what we're seeing and how do we use it . . . it's probably more about the quality of dialogue and facilitation that we have around us to make it [findings] more sticky in nature . . . to link it to action."

The literature review identified several cultural attributes that contribute to an effective learning culture, although it also emphasizes that changing a foundation culture is an incremental process.

**Foundations see failure as an opportunity for learning and create a supportive culture to encourage it.**

**Foundations have a high tolerance for risk, experimenting, and operating under conditions of uncertainty and ambiguity.**

**Foundations coordinate and communicate across functional areas, taking a flexible approach to MEL and being open to adaptation.**

**Foundations emphasize learning and establish processes to facilitate and embed learning into operations from early on.**

Making learning intentional by setting aside time—sometimes at regular intervals and integrated into their processes and systems—is essential to supporting a learning culture. Toward this end, several foundations hold "pause and reflect" sessions to reflect on their investments' progress, the outcomes being realized, what was working, and the trends and levers in the system.

The LEGO Foundation is increasingly aware of the importance of systematically building learning questions into the pipeline process—What do we know? What did we learn previously?—and starting to think about how learning can be made easier and more effective through incentives within the system.

The Jacobs Foundation organizes learning cycles in shorter timespans of two to four months to understand progressive change. These are targeted learning efforts that explicitly emphasize understanding grantees' perspectives.

> We compartment our work in such a way that we are able to understand everything that is happening progressively, which is why we have all of these learning cycles regularly . . .
>
> Even if we have short learning cycles, we are still able to make programmatic and actionable decisions on what we are doing.
>
> **—Dr. Samuel Kembou, Jacobs Foundation**

Workshops are another common method of engaging and facilitating learning. The Central Square Foundation organizes sense-making workshops where all stakeholders gather to interpret programming data jointly. Dr. Akashi Kaul noted, "The narrative, the story, how we're going to put it out there, all that has to be co-created with the implementation team."

The Gates Foundation–India also utilizes collaborative sense-making workshops. However, it acknowledges that while talking is essential, it should be designed to fit within the program team's operational work demands. As noted by Dr. Suneeta Krishnan, ". . . time we spend in workshops looking at data and talking is time we are not spending with our government partners and in the field. So right-sizing this kind of learning effort is also something that we're still sort of figuring out." Gates Foundation–India also has periodic reflection points aligned to the "rhythm of our business," where learnings from MEL are brought into strategic thinking and planning.

Dennis Arends at Porticus Foundation noted that planning for learning moments throughout a program's course and not only at mid-points, especially for programs that run for five years or more, is crucial. Different programs are at various points in their implementation cycle. Where they are in this cycle determines the kind of learning conversations possible: one should "let go of these fixed moments in the year to do sense-making . . . obligated-mandatory-annual-January kind of sense-making." In this view, learning moments should be flexible, appropriate, and synced to program operations.

## 2.6. MEL Needs a (Senior) Seat at the Table

The foundations emphasized the importance of positional leadership in driving MEL. Respect for, recognition of, and integration of MEL throughout the foundation requires MEL leaders with organizational authority. Having a MEL leader in a senior managerial position is essential for signaling and decision-making.

In terms of signaling, when a MEL leader holds a senior role (i.e., reports to the board or CEO or is part of the organizational leadership team) and is integrated into critical organizational processes, it sends a clear message that MEL is a top organizational priority, helping to ensure that evidence is incorporated into decision-making and planning.

The Jacobs Foundation, for example, intentionally placed MEL leads within its senior leadership to support its influence within the foundation:

> We wanted to have someone with a pretty high level of seniority on this, who has the credibility, the ability to influence and to really work very closely with our programmatic terms in order to position learning in MEL overall as a critical and absolutely one of the most important functions that we have in the organization.
>
> **—Donika Dimovska, Jacobs Foundation**

At Mulago, evidence-based and collaborative decision-making is a core principle that permeates all organizational levels, which are intentionally lean to focus on impact. Its senior leadership-level team understands what good evidence is and its importance. In addition to senior leadership, staff are expected to gather, question, and comprehensively understand evidence.

## 2.7. Building Grantee Evidence Literacy is Key to Advancing Impact

Co-ownership of MEL, including collaborating with grantees, was a strong theme across the interviews. Some of the foundations' way of working has shifted from a top-down approach to one emphasizing collaboration with grantees. Under this approach, co-creation and discourse are critical. This is also reflected in the literature, which documents a growing recognition that grantees value the investment of time and resources in cultivating deeper relationships of mutual support with funders combined with an increasing emphasis on collective problem-solving and strengthening their MEL capacity, either using the foundation's MEL staff or external service providers.[8] The foundations also increasingly see a role in enhancing grantees' capacity to participate in higher-quality or more rigorous measurement activities.

At Porticus Foundation, Senior Analyst (Strategy and Learning) Dennis Arends notes: "My team is involved in . . . thinking through what the program could look like, starting all the way from the co-creation of a ToC [and] a MEL framework . . . We do this together with our partners . . . we want to make sure that every program we develop is conducted in a co-creating fashion." Corina Campian at CIFF similarly noted, "We always involve the grantees from the very beginning. We really do emphasize this co-creation of evaluations."

Grantee evidence literacy is another critical area for successful MEL efforts and increased funding impact. According to the foundations, the ideal approach to MEL is rooted in a deep understanding of and commitment to an evidence-informed intervention with grantees who act as partners or even owners of investigative efforts in ways that lead to shared learning for the grantee and foundation. To set the agenda for MEL, grantees need to be empowered to use evidence well to design and modify programs, twinned with the capacity to identify key research questions and sense-make the findings.

The foundations recognize that the vision of grantees empowered to use evidence in diverse contexts is not yet a reality due to factors such as the scarcity of resources, lack of formal or informal opportunities, or a nascent culture of evidence use within funding organizations. To get closer to grantee (co)-ownership of MEL, several foundations are working with grantees to build their MEL capacity. They seek to do this in various ways, often conceptualizing this as a "journey" or "ladder" in evidence use.

The Lemann Foundation is developing a rubric to assess grantees' MEL capacity as part of a strategic approach to advance them on their "evidence journey." Dr. Daniel De Bonis describes this rubric as a "survey [to understand] what kind of monitoring [grantees] do, what kind of impact evaluation they have done in the past and what kind of methodology . . . was it peer reviewed or not? . . . And based on that, we're developing a strategy to really help them climb this ladder."

[8] Rodericks, A., Cock, C., & Gioel, G., et al. (2024) Understanding the re-granting ecosystem in the global south: Environment, gender, social justice & human rights in Asia, Latin America and the Caribbean. Funded by Oak Foundation. www.philanthropydialogues.org.

CIFF has found that one of the more successful ways to build and sustain grantees' MEL capacity is to fund in-house MEL staff. Corina Campian reflected that "where we have been most successful in building capacity for M&E has been where we have funded specific positions as part of our grantee partners' organizations, as opposed to hiring consultants or us offering support in an ad-hoc way. Because having staff members at grantee organizations, whose full-time role is to think about impact, evidence generation, and so on, is much more helpful and sustainable."

At Co-Impact, Dr. Varja Lipovsek described their support grantees as follows: "We believe that one of the best ways to contribute to tackling some of the really complex issues that exist in the countries where we fund is to get behind the civil society organizations that have the political capital, the longevity, and the trust, basically that are deep-rooted in the context and have demonstrated success in the areas of work that they're working on."

Co-Impact provides funding for a year of structured support as a "design grant" (or "Year 0") to allow grantees to develop their strategy and vision for systems change, including an aligned MEL plan, and to identify their MEL needs. This enables grantees to invest more seriously in considering their impact objectives and developing strategies to deliver these at scale. Additionally, Co-Impact curates a list of coaches that grantees can tap for their work and funds communities of practice to convene grantees for discussion and learning. The Co-Impact model hinges on devolving power and learning to grantees.

Yayasan Hasanah curates MEL resources on an online learning platform called the Hasanah Academy to build grantees' capacity. Additionally, in the past years, they have organized training for grantees to build MEL capacity and other skill sets. Hwa En Ning described how the foundation curates its offerings: "We look at the work our partners (grantees) are carrying out and the needs on the ground coming from our partners as they implement their programs. We then try to put together something that would be beneficial for them."

## 2.8. Contribution, Rather than Attribution, Takes Center Stage in Complex Systems

Many foundations fund systems change or collaborative efforts in addition to or rather than individual programs or interventions. As a result, the philanthropic sector is increasingly grappling with complex social and policy systems. At the same time, the funding ecosystem is growing complex, with multiple funders of public and private organizations putting resources into similar social interventions, often in collaborative grant-making efforts.

Against this backdrop, many foundations are shifting away from a focus on measuring attribution (or causality) to one of measuring contribution. This emphasis on contribution over attribution was a core theme in both the interviews and the literature review. (To be clear, most of the foundations interviewed did rigorous impact evaluations, including RCTs, although they did not prioritize them.)

Paul Brest, in his 2012 article for *Stanford Social Innovation Review*, aptly explains this finding: The large number of exogenous factors and actors in the policy space confound attempts to determine which organization or strategy made a difference: "It's like joining the group pushing the boulder up the glacier, but not knowing with much confidence whether the group would have succeeded without you.[9]

The complexity of the systems in which foundations are piloting innovations together with the rich landscape of other interventions makes measuring attribution difficult, if not impossible, a factor alluded to by Dr. Akashi Kaul from Central Square Foundation and Dennis Arends at Porticus Foundation:

[9] Brest, Paul. (2012). Risky Business: How the William and Flora Hewlett Foundation approaches high-risk philanthropic ventures. Stanford Social Innovation Review.

> Frankly if you were to ask a bunch of us in the leadership team at Central Square Foundation personally, do we [still] believe in attributional change . . . I think a large part of us would say not really . . . we've seen how complex systems work . . . Even in a well constituted RCT, which is run by one of the best universities in the country . . . we are [often] unable to control for other interventions.
>
> **—Dr. Akashi Kaul, Central Square Foundation**

> The obsession with attribution needs to disappear, needs to go. In most of the cases, if you have a very isolated grant, you can do that. But as soon as you go beyond that . . . they should be talking about contribution.
>
> **—Dennis Arends, Porticus Foundation**

However, none of the foundations believe this inability to attribute change to particular interventions or actions is a serious issue; complexity and messiness are inherent aspects of their operating circumstances.

The foundations favor theory-based methods to measure their contribution to systems change. These methods develop an explicit ToC or logic model to explain the causal logic underlying the intervention, followed by measurement methods to test whether the theory holds true.[10] When asked to elaborate on their specific approach, foundations typically referred to qualitative methods such as contribution analysis, process tracing, or outcome harvesting (see below).[11] While all of the foundations were clear that establishing approaches to evaluate contributions in systems change work was necessary, none were confident they had landed on the "right" method, and no "gold standard" approaches surfaced in the discussions.

### Contribution analysis

A methodology used to identify the contribution a development intervention has made to a change or set of changes. The aim is to build a credible, evidence-based narrative of contribution.

### Process tracing

A methodology to establish whether and how a potential cause or causes influenced a specified change or set of changes. This is done by applying formal tests to examine the strength of evidence linking potential causes to the changes.

### Outcomes harvesting

A methodology used to identify, verify, and analyze the changes brought about through a development intervention. It is designed to collect evidence of change and then work backward to assess the intervention's contribution to that change.

[10] Theory-based evaluation (2017). INTRAC.
[11] Definitions of methodologies can be found at https://embed.kumu.io/6aab003ac164bfea5f65d9a1582c676f#me-universe.

The foundations recognize that many civic and government actors jointly contribute to bring about and scale change, bringing their expertise, experience, and networks to bear. Thus, they perceive their role as contributing to, strengthening, or accelerating these other efforts to effect systems or policy change. Despite the Gates Foundation's size—Gates is one of the world's largest and most influential global foundations—the size of the Indian government dwarfs anything the foundation can bring to the table. Thus, the Gates Foundation–India sees their contribution as a catalyst, contributing to the momentum for change through strategic systems or policy interventions.

> We're just supporting the ecosystem. The government is who's doing it. They are the real people who are responsible for all of the work that needs to be done. We're just . . . a catalytic agent or support structure.
>
> **—Dr. Suneeta Krishnan, Gates Foundation–India**

Yayasan Hasanah is Malaysia's leading foundation, yet it, too, recognizes that its influence on broad-based systems change is incremental. Thus, it relies on collaboration with other systems or policy actors to contribute meaningfully to systems change.

> We don't think it's possible for one foundation, even if we may be the leading grant making foundation in Malaysia, to reach real impact alone.
>
> **—Hwa En Ning, Yayasan Hasanah**

## 2.9. External “Learning Partners” Play an Important Role

Several foundations are forging long-term, strategic relationships with external entities or individual advisors as “learning partners.” While these learning partners take on a number of tasks in collaboration with the program teams, such as setting up MEL systems, conducting evaluations, developing theories of change, supporting implementation, or building MEL capacity, their most important role is driving organizational learning.

This learning partnership involves the external party as a “critical friend,” whether in place or supporting the MEL team. Rather than being predicated on tightly defined contracts with key milestones and deliverables, the foundations describe it as a collaborative advisory relationship based on trust, open discussion, and a long-term partnership.

The Jacobs Foundation, which has no designated MEL unit, perhaps has the deepest relationship with its external learning partner. Dr. Hallie Preskill described the foundation’s relationship with its learning partner: “[This] was going to be a long-term, multi-factor, multi-layered relationship, and that partner was going to be a strategic MEL partner . . . That learning partner has been part of the journey for the last two and a half years.” The foundation’s relationship with this long-term strategic partner has been pivotal in transforming itself into a learning organization.

Co-Impact has engaged an independent learning partner to accompany a cohort of grantees for two years through a participatory analysis of their systems change strategies. The purpose is not to evaluate their grantees in the sense of judging their effectiveness but to enhance their own and collective understanding of what it takes to contribute to systems change and better outcomes for people.

Four of Van Leer’s country portfolios have external MEL partners, two full-time and two part-time, who provide MEL support to grantees across the portfolio. These external MEL partners measure portfolio performance and participate in high-level discussions with senior and executive management. Their expertise is trusted, and their decisions are respected. Program teams are also involved in the monthly check-in meetings with the MEL staff and the external evaluator assigned to their country portfolio, enabling close oversight of what is happening.

## 2.10. Communications Is an Important "Tool for Impact"

The foundations see external communications as a critical tool for ensuring the effectiveness of their MEL function. A clear, concise, and targeted communication strategy—how to share information, with whom, with what medium, and at what level of detail/research rigor—is vital to creating impact.

Central Square's Dr. Akashi Kaul's communications background (including as a journalist) makes her particularly attuned to the importance of considering audience, medium, message, and design in communications. Policymakers, for example, need short, tightly packaged documents that look "pretty." Meanwhile, evaluators struggle with making learning insights meaningful for non-experts, a point Dr. Akashi Kaul wryly noted, "You know, I was just looking at a bunch of K density graphs my team put together yesterday, and . . . nobody can read these." Engaging communications colleagues in thinking through knowledge translation and dissemination is an essential component of Central Square's work.

> Internally, it's easier to consume it [MEL insights] in various ways, and we know each other. But externally . . . unless we're able to package and present it in ways that are persuasive to the audiences that we want to be persuasive to, it doesn't really matter how great the insights are.
>
> **—Dr. Akashi Kaul, Central Square Foundation**

Jacobs Foundation's MEL staff are integrated within the Knowledge and Communications team, reflecting the foundation's belief that communications is a "tool for impact."

> We think of communications as a dissemination, communication channel to talk about the key things that we want to see in the world, about the impact that we believe evidence can have . . . we use it as a way to convey the importance of the things that we believe in and also to connect people to each other to showcase some great things that partners [grantees] are doing, and also to influence the field and the way that philanthropy should be thinking to about these issues.
>
> **—Donika Dimovska, Jacobs Foundation**


Aku si Penjaga Sawah
Aku Punya Banyak Teman

The Lemann Foundation stresses the importance of transparency in external communications. As noted by Dr. Daniel De Bonis, "We are one of the biggest foundations in Brazil, so I think we have this responsibility of showing people what we're doing, even exposing ourselves to criticism . . . but having this transparency, showing what we're doing, I think it's very important, and I think a lot of other organizations can learn from that."

**Critical success factors for leveraging communications as a tool for impact include:**

- Using the right modalities for the target audiences and creating appropriate communication products. The Lemann Foundation, for example, has found that one-page summaries are useful for policymakers with limited time or technical expertise.
- Prioritizing brevity. Evaluation reports should be no longer than necessary and accompanied by an Executive Summary or condensed version for decision-makers unlikely to read the full report. As Dr. Akashi Kaul at Central Square Foundation observed, "Most officials do not like reports more than 10 pages."
- Avoiding the overuse of jargon and technically dense language. Loading communication products with jargon or technical language makes them inaccessible to lay audiences. Using language they will understand is critical, even when explaining technical concepts. Dr. Darja Dobermann of the Van Leer Foundation described this as a process:

> I've really been focused on . . . rehabilitating the image of MEL in the last year, and a lot of that has been around making it more engaging, making it more interesting, making it more fun, making it more relaxed . . . a lot of that for me was also letting go of an attachment to language . . . Occasionally, if it's really wrong, I'll correct it. . . . If someone's going external, I'll be like . .. you might want to use this language instead.
>
> **—Dr. Darja Doberman, Van Leer Foundation**

Several foundations are taking steps to set up or work more closely with their communications teams to enhance their external communications. Mulago recently hired their first dedicated communications role. Co-Impact has a new dedicated communications team that creates knowledge products for external audiences and improves website content.

For Mulago and one other foundation, appealing, audience-friendly communications must be balanced with presenting accurate information, reflective learning, advancing impact, and, according to Dr. Kristin Gilliss Moyer at Mulago, channeling resources to effective organizations: "I think we're very cognizant that philanthropy is a dysfunctional market, and it's not necessarily the things with the most impact that get the money, right? It's often who has the glossiest, best comms is sometimes who gets the money. And so, we're interested in thinking about how we can play a role in trying to drive more resources to the organizations we think have impact."

A senior foundation representative noted the importance of communications going beyond positive narratives: "I think the vast majority of annual reports . . . impact reports do tend to be good news exercises rather than overall reflective pieces around where we're making progress, where we're seeing it [the program] having the effect and why." Hence, MEL-related communication must evolve into more honest reflections, drawing lessons from successes and failures to improve outcomes.

# 03 Conclusions and Opportunities

**Learning is a significant priority for philanthropy. Better collaboration will benefit the sector.**

Nearly all the foundations approached to participate in this research did so without hesitation. They were flexible, enthusiastic, and open. Their foundations' deep commitment to learning was evident in their participation in these interviews and their openness about challenges and opportunities both they and the sector face. A few general conclusions emerge from this study in the spirit of this learning orientation.

First, **individuals in the sector are eager to learn about leading MEL practices,** but there are too few platforms to do so, particularly outside the US. There is an appetite for showcasing insights and exploring mutual challenges. At least one barrier to doing so is that too few platforms (e.g., networks, media) are focused on philanthropy. Further, pulling together insights (such as those in this study) is not difficult or expensive. Yet, they can be a lasting public good that may support the advancement and acceleration of good practice.

Second, **there will likely be common or collaborative solutions and opportunities to some of the challenges raised in these interviews.** For example, most foundations described their interest in building institutional and grantee capabilities using evidence. Still, none appeared to collaborate with other institutions to tackle this shared challenge—which would likely result in greater efficiency and effectiveness for participating institutions.

Third, **there is a clear need for more focus on learning within philanthropic networks.** Currently, much of the shared information is centered on success stories. However, the foundations highlighted the value of learning from what didn't work in addition to what did. The openness and curiosity of the individuals interviewed demonstrate a strong commitment to learning and an understanding that catalytic work in philanthropy often involves trial and error. Therefore, a greater focus on learning from failures would be of interest and beneficial.

Fourth**, there is an opportunity for methodological innovation, mainly related to methods to assess systems change and policy impact or, more generally, evaluating programming results in complex environments where attribution is not an option.** While each of the foundations was working through the conceptual and methodological details of evaluating their results in complex environments, none had settled on an approach, and all were eager to learn how their peers were tackling this issue.

Finally, **we recommend ongoing study of this area to hone practice within this rapidly developing sector. If we "stay humble and stay curious,"** in the words of Dr. Suneeta Krishnan, we can accelerate our learning and ensure that philanthropic institutions are best set up to maximize their impact.

# 04
# Case Studies of Participating Foundations

**The following section consists of case studies of 10 foundations according to the outline below:**

- An overview of the foundation's work
- Purpose of MEL
- Structure of the MEL team
- Evaluation criteria regarding what to evaluate and how
- MEL in informing learning
- Key drivers of learning

# 1. | Jacobs Foundation

## Foundation Overview

Jacobs Foundation is a Switzerland-based philanthropic organization that is dedicated to quality child learning and education globally. The Foundation invests in global research to discover how children learn, promote the use of evidence by schools and EdTech, and support countries to shape and implement education policies based on evidence.

**Headquartered:**
Switzerland

**Geographic reach:**
Global

**Year established:**
1989

**Key areas of work:**
Child and youth development, education

**Estimated annual giving:**
USD 71.0 million (2023)

**Website link:**
https://jacobsfoundation.org/

**Mission statement:**
The Jacobs Foundation seeks to improve children's learning and education by promoting the generation and translation of evidence into policy and practice—connecting evidence to action and action to systems.

## What is the purpose of MEL within the Jacobs Foundation?

> Learning is really elevated at the level of strategy for us.
>
> **—Donika Dimovska, Jacobs Foundation**

Learning is at the core of the Jacobs Foundation's strategy, and MEL is the key driver in supporting its design, execution, and refinement. In the philanthropic world of competing requests and opportunities, MEL is a useful practice in retaining the foundation's focus on the areas of work and impact to which the organization is dedicated.

By emphasizing developmental approaches to its strategy, the Jacobs Foundation also uses MEL to articulate the pathways to achieving change through its investments and test its assumptions of how the desired outcomes are achieved. This has supported it in determining suitable investments and discontinuing investments for which the pathways to change were found invalid.

## Jacobs Foundation's MEL team

- **Size of MEL team:**
  The Jacobs Foundation has a Knowledge and Communications function, where two staff members drive MEL in the foundation and work closely with an external evaluation and learning consultant to support the foundation in its journey to becoming a learning organization.

- **Partnership with external evaluators:**
  The Jacobs Foundation forms long-term, strategic partnerships with external evaluators, or "learning partners," to support its MEL work. The foundation's collaboration with their learning partners does much more learning than just evaluation.

- **Ways of working with the program team:**
  Each year, the Jacobs Foundation and its grantees, referred to as funded partners, work closely with internal program teams to ensure the foundation's learning objectives align with program needs and agree on key learning activities. The foundation's learning partners then execute its MEL approach, including measuring progress indicators and capturing learning insights, and report it internally.

## What are the evaluation criteria used by the Jacobs Foundation?

The Jacobs Foundation invests in a small number of substantial programs, which allows it to evaluate across its entire portfolio of work. Programs for which a critical decision is required will be prioritized to facilitate timely and evidence-based decision-making.

**Evaluation methods:** The foundation utilizes various evaluation methods, recognizing that different methods are needed to examine programs at different stages. For example, they use developmental and formative methods to evaluate key programs instead of more rigorous methods unsuitable for the current developmental stage of their program.

The organization is keen to explore other methods, such as contribution analysis and other theory-based methods, to articulate their contribution towards their goals.

## How does MEL inform learning in the Jacobs Foundation?

Learning objectives are established at the start of funding a new program or initiative at the Jacobs Foundation. The team routinely monitors progressive change and captures insights from partners, including grantees. These findings inform the foundation's understanding of its programs and aid programmatic decision-making.

### Key learning drivers:

**Learning timed to decision-making cycles and connected to action:**
An intentional approach compartmentalizes the MEL work in short, targeted learning cycles of two to four months so that learning about what happens in the program occurs progressively, and timely insights enable actionable decisions.

**Engaged leadership:**
Involving leadership (e.g., board members) in the learning process and cultivating a deeper understanding of the work and change processes are essential drivers for effective internal learning. Having buy-in from leadership ensured that learning was prioritized within the foundation.

**Strong commitment to being a learning organization:**
Learning is a continuous process that requires constant organizational investment and may not always yield positive insights. The Knowledge and Learning team that drives learning enjoys considerable influence within the foundation and is firmly committed to the process. They are open, adaptable, humble, and willing to make difficult decisions because of what they learned.

**Facilitated conversations between stakeholders:**
A Knowledge and Learning team member typically attends meetings with leadership and program teams to facilitate conversations and make sense of M&E findings. This enables greater comprehension of the evidence and its complexities, provides opportunities to reflect, and promotes understanding of one another's perspectives.

**Deep understanding of the programs:**
Developing a deep understanding of programmatic work is a vital learning driver, as a surface-level knowledge of programs would not be sufficient to understand M&E findings.

# 2. Central Square Foundation

## Foundation Overview

Established in 2012, Central Square Foundation is a non-profit organization dedicated to enhancing the learning outcomes of all school-going children across India through system-led reforms. The foundation's initiatives span innovation and policy to practice and focus on learning. impact at scale.

**Headquartered:**
New Delhi, India

**Geographic reach:**
India

**Year established:**
2012

**Key areas of work:**
Education

**Estimated annual giving:**
USD 1.0 million (2023)

**Website link:**
https://www.centralsquarefoundation.org/

**Mission statement:**
Central Square Foundation aims to ensure quality school education for all children in India.

## What is the purpose of MEL within the Central Square Foundation?

Funder accountability and learning are the principal factors for practicing MEL at Central Square Foundation. As a maturing foundation, driving learning through MEL enables it to learn from its past work and contribute to existing knowledge about education. Educational assessments are widely used within the education sector, which aligns well with MEL efforts to capture educational outcomes.

Currently, a key focus of the foundation's MEL approach is to understand better its stakeholders in the education system (e.g., teachers, students, and workers in the education ecosystem). The foundation hopes to place its stakeholders in the center, allowing learning to be driven by the people it serves instead of the foundation itself.

> Accountability . . . should be linked to learning. So, these should not be two separate silos, so to speak. But our reasons for doing MEL are both.
>
> **—Dr. Akashi Kaul, Central Square Foundation**

## Central Square's MEL team

- **Size of MEL team:**
  11 staff members work across research, monitoring, evaluation, assessment, and learning.

- **Partnership with external evaluators:**
  The foundation works with external MEL partners where there are external reporting requirements. In the absence of external reporting requirements, the organization carries out its own MEL efforts.

- **Ways of working with the program team:**
  Monitoring is directly embedded within the programmatic functions, and program teams are responsible for collecting monitoring data. The MEL team works closely with the program teams to review the data periodically and determine whether any action needs to be taken regarding the programs.

## What are the evaluation criteria used by the Central Square Foundation?

Monitoring is a crucial function within Central Square Foundation, as it recognizes that evaluating every program is not feasible. Access to education data, for example, presents a significant challenge in certain Indian states due to the lack of data infrastructure. The foundation is thus moving towards strengthening its monitoring systems to track key program outputs, which can be useful indicators for understanding programmatic work.

**Evaluation methods:** Central Square Foundation believes in the primacy of assessments, as opposed to evaluations. It noted that there is a tendency to conflate the results of education assessments with evaluation within the sector and that evaluations should go beyond assessment results to understand other process outcomes. For evaluations, it utilizes various methods, including experimental designs. However, the specific evaluation method is driven by the evaluation objectives, which its funders may determine. The foundation is equally vested in experimental and quasi-experimental methods and is interested in exploring other methodologies, including contribution analysis and process tracing, to understand its contribution to the education ecosystem.

## How does MEL inform learning in the Central Square Foundation?

Learning is driven by the MEL and program teams working closely to sense-make and develop a shared understanding of MEL findings. The foundation also engages its funders to share learning insights, and the process may differ depending on the funder's preference for engagement.

### Key learning drivers:

**Engaged leadership:**

An engaged board and leadership team that understands that progress can only be viewed in an extended timeframe is a critical learning driver.

**Framing early learnings:**

Progress often requires an extended timeframe to measure. One way to facilitate learning is to understand how a promising result might present itself and collect data to drive early learning.

**Delving deeper into understanding what works to facilitate action:**

It is essential to delve deeper into understanding program findings by investigating precisely what works and its contributors. This may require additional targeted evaluation efforts. This allows the foundation to gain more nuanced insights to adapt programs in more beneficial ways.

**Frequent communication:**

Regular meetings with program teams enable learning. Especially within a large organization that works within a constantly changing landscape, frequent communication between MEL and program teams facilitates better implementation of organizational MEL functions. However, pragmatic considerations often limit program teams' ability to implement insights from MEL findings.

# 3. LEGO Foundation

## Foundation Overview

The LEGO Foundation is a Danish corporate foundation that focuses on children's learning and development. They aim to give all children opportunities to learn through play. To reinforce its support, the foundation collaborates with partners to develop play-based teacher training programs for early childhood education and invests in research that shows play-based learning works.

**Headquartered:**
Denmark

**Geographic reach:**
Denmark, Greenland, Mexico, Kenya, South Africa, Ukraine, Vietnam and USA.

**Year established:**
1986

**Key areas of work:**
Child development, education

**Estimated annual giving:**
USD 198.0 million (2023)

**Website link:**
https://learningthroughplay.com/

**Mission statement:**
Our aspiration is for children to become creative, engaged, lifelong learners who thrive in a constantly changing world.

## What is the purpose of MEL within the LEGO Foundation?

The LEGO Foundation takes a portfolio approach to MEL. This involves understanding the impact of different grants, how the foundation contributes to changes in the diverse contexts where it works, and the collective progress of its overall portfolio. Key MEL objectives include improving strategic decision-making and grant-making approaches. The organization also seeks to ensure MEL activities are relevant, proportionate, and useful for grantees. Learning and improvement are key MEL drivers at all levels. They also inform accountability and communication. LEGO Foundation's MEL practices are evolving to account for complexity rather than utilizing a linear, predictive approach.

> I think it's MEL for learning and improvement at all levels, I think [it] has to be the driver for us.
>
> **—Joe Savage, LEGO Foundation**

## LEGO Foundation's MEL team

- **Size of MEL team:**
  Two full-time MEL staff members are part of an overall Portfolio Impact team responsible for portfolio and data management.

- **Partnership with external evaluators:**
  The LEGO Foundation collaborates with external partners to support hands-on MEL work, including data collection and grantee capacity-building. External evaluators are used when a task's scale exceeds internal staff capacity and where support close to the ground is more beneficial for global projects.

- **Ways of working with the program team:**
  LEGO Foundation hopes to build MEL capacity within its program team to engage with MEL planning and design and use data more easily.

## What are the evaluation criteria used by the LEGO Foundation?

The LEGO Foundation aims to concentrate its MEL efforts on the strength of evidence model, emphasizing evaluation for promising areas of work where more rigorous evidence is needed. For areas of work where rigorous evidence exists, more monitoring and targeted evaluation activities may be required instead. In this manner, proportionality is optimized to right-size the amount and type of MEL in any given context. Intentionality is also seen as necessary for understanding where MEL should focus. The LEGO Foundation is rationalizing the various factors influencing data collection (e.g., financial threshold, risk threshold).

**Evaluation methods:** Different evaluation methods are used. The LEGO Foundation has a global portfolio spanning numerous settings, so the MEL team emphasizes respecting cultural contexts and systems in its evaluation work. To that end, the foundation prioritizes context-appropriate methodologies. As a result, the foundation recognizes that less rigorous methods may be most appropriate in some contexts. Understanding a method's limitations and the strength of conclusions based on that method provides clarity on what can be done with the findings.

## How does MEL inform learning in the LEGO Foundation?

The LEGO Foundation seeks to incorporate reflection and learning activities into its routine practices to inform planning and decision-making processes at both team and portfolio levels.

### Key learning drivers:

**Informed decision-making:**
MEL is more than accountability or communications; it also supports decision-making and adaptations that inform impactful grant-making.

**Access to the right information at the right time:**
Foundations need access to high-quality information at the right time when making decisions. More structural processes must be built to reflect learning and aid decision-making.

**Quality of dialogue and link to action:**
Getting the right people at the right time to facilitate dialogue, discussion, and reflection on what they are seeing and how to act on it produces more lasting learning and is more likely to lead to action.

# 4. Co-Impact

## Foundation Overview

Co-Impact brings together local changemakers and funders from around the world to make health, education and economic systems stronger and more inclusive—creating impact that lasts. The organization's commitment to advancing gender equality and women's leadership is central to this goal.

By focusing on systems, Co-Impact works at the scale of the problem—dismantling the root causes of inequality that disadvantage hundreds of millions of women, girls, and marginalized communities. Spanning five continents, their team identifies partners that will create lasting progress when supported with the resources to work at scale.

**Headquartered:**
Global

**Geographic reach:**
Africa, Asia, and Latin America

**Year established:**
2017

**Key areas of work:**
Education, health, economic opportunity, gender equality, and advancing women's leadership.

**Estimated annual giving:**
USD 75 million

**Website link:**
https://co-impact.org/

**Mission statement:**
Co-Impact envisions a world where all people can live fulfilling lives, where systems and societies are just and inclusive. Co-impact stands for gender equality, where all women have the opportunity to exercise power, agency, and leadership at all levels.

## What is the purpose of MEL within Co-Impact

MEL is deeply rooted in Co-Impact. Learnings from MEL provide a roadmap for the organization and other stakeholders (e.g., program partners, the program's ecosystem, etc.) to move towards the organization's goals of contributing to significant and lasting improvements in education and health systems and economic opportunity. There is a strong focus on using evidence at Co-Impact and learning from what the evidence says.

Co-Impact's core hypothesis is that stronger civil society organizations will be more effective system actors, enabling systems to serve people better. Therefore, MEL has three distinct and complementary purposes at Co-Impact. At the forefront, the organization works to strengthen their grantees' capacity to develop and apply robust and relevant MEL practices aligned to their strategies to achieve impact at three levels: for people, for the systems meant to serve people, and for the organization itself. The second purpose of MEL is to synthesize evidence and lessons across the varied portfolios. The third is to learn about effective funding practices. The organization does not prescribe indicators and methods to its grantees and does not independently evaluate them. Instead, it actively supports its grantees in measuring, evaluating, and learning in a way aligned with their own strategy and brings relevant and useful connections in the region to strengthen the partner-grantees' capacity and impact.

Building the capacity of grantees is imperative to Co-Impact, and the organization does this in various ways. First, it has in place a funded design grant (or "Year 0") for most new partners, where the leadership team of new partner-grantees gathers for a four-day workshop, which is the start of a 9-12 month-long process of designing a systems change strategy for the partner organization, including the identification of relevant outcomes at the three levels (which form the initiative's dashboard). The funded Year 0 is structured with learning modules, enabling the team to think through the project design phase thoroughly. Second, Co-Impact encourages partners to identify the most critical organizational capabilities they want to strengthen, which often includes MEL. Such organizational strengthening is built into the overall budget for the initiative. Third, Co-Impact curates a list of organizations and coaches for grantees to connect with and support them in developing strategies and MEL practices. Lastly, Co-Impact has funded entities to set up and facilitate communities of practice where partner grantees can share and learn from each other.

Additionally, the organization strives to contribute to regional and global evidence of what works in supporting systems change and advancing intersectional gender equality by exploring novel ways of synthesizing systems change across a varied portfolio. It supports grantees in integrating learnings from their work and building the evidence base.

> It is our job to support our program partners to be as strong as possible in doing measurement and evaluation and learning that is consistent and relevant to their own strategy.
>
> **—Dr. Varja Lipovsek, Co-Impact**

## Co-Impact's MEL team

- **Size of MEL team:**
  Co-Impact has a dedicated MEL team with a staff strength of two full-time members and an analyst at 0.6, working horizontally across the three regional teams.

- **Partnership with external evaluators:**
  Co-Impact resources and supports program partners in engaging external evaluators according to their needs and choices. In addition, it has recently engaged an independent learning partner to accompany a cohort of partner grantees in a participatory two-year exercise to tell their stories of specific systems change efforts and synthesize lessons about working with systems across the cohort.

- **Ways of working with the program team:**
  The MEL team works closely with the program teams across the regions to ensure their confidence in doing MEL work. It also provides deeper support to a selected number of partners in coordination with the regional teams.

## What are the evaluation criteria used in Co-Impact?

Co-Impact does not independently evaluate programs or mandate grantees to conduct evaluations. Instead, it encourages grantees to think about evaluation approaches that are relevant and useful for their strategy and supports them with funding and other resources.

**Evaluation methods:** Co-Impact does not prescribe specific evaluation methods but believes in fit-for-purpose methods that match the research questions. It expects grantees to adopt appropriate methods for their context and use established measures where possible. It encourages program partners to explore diverse approaches well-suited to evaluating complex initiatives, including contribution analysis, outcome mapping, process tracing, and developmental evaluation.

## How does MEL inform learning in Co-Impact?

All program partners develop and share dashboards (capturing the primary outcomes of the initiative) and narrative reports on an annual basis. These are complemented by other sources of learning, such as insights generated through communities of practice and internal reflections by the program team. Co-Impact also organizes quarterly "pause and reflect" sessions, during which programs' progress and outcomes are shared, and lessons are discussed.

### Key learning drivers:

#### An engaged board:

The organization's board has consistently been involved in MEL conversations, which has evolved its MEL mindset and expectations to embrace the nuances and complexity of measuring systems change (rather than expecting a one-size-fits-all approach to measurement).

#### A dashboard to facilitate learning insights:

The organization utilizes a shared dashboard with grantees, with strategy outcomes entered at three levels—people, system, and organizational. This dashboard is primarily for the use of the grantee partners to track the evolution of their systems change approach and make adjustments as needed. In addition, using these dashboards has enabled capturing outcome data in a way that allows Co-Impact to visualize and understand the progress of different projects and draw learning insights along the way for internal reflection.

# 5. Gates Foundation-India

## Foundation Overview

The Gates Foundation is a private philanthropic organization that aims to create measurable impact in the fight against poverty, disease and inequity around the world. It also funds entrepreneurs, companies, and other organizations to harness the power of private enterprise to create change for those who need it the most.

**Headquartered:**
United States

**Geographic reach:**
Global

**Year established:**
1994

**Key areas of work:**
Health, sustainable economic growth, policy & advocacy, gender inequality.

**Estimated annual giving:**
USD 7.7 billion (2023)

**Website link:**
https://www.gatesfoundation.org/

**Mission statement:**
The Gates Foundation seeks to create a world where every person has the opportunity to live a healthy, productive life.

## What is the purpose of MEL within the Gates Foundation-India?

MEL serves two functions at the Gates Foundation–India: learning and accountability.

Many of the health and development issues the foundation's India office works on are in partnership with the government and the states of India. The systems are complex; hence, MEL data enables insights for program teams to learn and navigate their work within complex systems.

MEL also plays a vital accountability function by supporting reporting at the country level. The India office provides an annual report at the portfolio level regarding the amount of funds it gives, the programming it implements, and the outcomes resulting from its work.

A strong commitment to advancing impact is fundamental to the foundation's MEL work. The Gates Foundation does not view MEL as an academic exercise to contribute to the global knowledge base; instead, it is animated by producing evidence responsive to the needs of the people working to advance impact on the ground. The Foundation's MEL work focuses on equity and paying attention to who is left behind and the unintended consequences of its work.

In late 2020, the India country office reorganized, merging the strategy and portfolio management functions with the MEL function. This created one unified business team to oversee the entire lifecycle of investments, from strategy formulation to implementation portfolio. This enabled MEL to be closely used in developing and refining strategy.

> Merging MEL with strategy and portfolio management enables me to build the capacity of my strategy team to understand the evidence and how to use evidence in the development and refinement of strategy.
>
> **—Dr. Suneeta Krishnan, Gates Foundation–India**

## Gates Foundation–India's MEL team

- **Size of MEL team:**
  The MEL team has four members and one part-time deputy director overseeing the work.

- **Partnership with external evaluators:**
  The Gates Foundation–India hires external evaluators for more mature portfolios.

- **Ways of working with the program team:**
  The MEL team is embedded within the program team instead of being external to them and operating as a centralized function. Each MEL staff member supports a set of portfolios and spends substantial time with grantees on the ground. In this way, the MEL team has built strong relationships based on trust with the program teams. The MEL team sees itself as the program team's "critical friend," bringing a critical lens to sharpen the program work. The MEL team developed a decision tool to guide the program team on what and how to draw down on the MEL services related to (a) seeking technical advice and consultation from the MEL team, (b) tapping the MEL team to co-own an investment, or (c) inviting the MEL team to run a MEL investment parallel to the program.

## What are the evaluation criteria used by the Gates Foundation-India?

With around 400 active investments, the Gates Foundation–India recognizes that not everything can be evaluated. The MEL team evaluates what is important to strategy and what is responsive to the program team's and grantees' needs and matches the method with the purpose. A fit-for-purpose method involves "selecting the right tool for the right question for the right stakeholder." Rigor is achieved through the method's being fit for purpose and timely.

While more "rigorous" evaluation methods such as RCTs are not feasible for most contexts where the foundation works, it does employ them when there is a strong government demand for evidence, typically when the intervention is relatively new, there is a need to establish a knowledge base, or they are feasible and acceptable to key stakeholders.

**Evaluation methods:** The foundation uses diverse evaluation methods, often with a mixed-methodology approach. Developmental, formative, and process evaluation approaches are valued for early-stage interventions. For evaluation of their role in systems change, they are less concerned about attribution and more interested in telling a story of contribution. The Gates Foundation is open to qualitative approaches, such as outcome harvesting or a rubric approach for measuring complex systems change.

## How Does MEL Inform Learning at the Gates Foundation-India?

Each mid-year, the Gates Foundation–India reviews its portfolios and MEL data to understand what has gone well, what has not, and what the key challenges were. It then rates portfolios formally based on substantiated evidence. The learnings are consolidated to feed into the foundation's strategy review during the third quarter.

The foundation also supports the learning of its grantees. It holds pause and reflect workshops and created a learning platform for its health systems work. To manage the platform, it hired an external MEL partner who works with grantees to map and understand the questions, risks, and assumptions concerning them. The foundation holds learning sessions to bring multiple grantees to look at the learning platform's data and discuss how a particular risk or assumption may play out. These learning efforts to support grantees can be intensive; hence, right-sizing the efforts is also essential to the foundation.

## Key learning drivers:

### Learning synced to the rhythm of business:

The portfolio review and reflection are intentionally timed before the foundation conducts a strategy review, which enables learning to be more effectively fed into strategy.

### Discipline and structure for intentional learning:

As people tend to be less disciplined about sitting, reading, and reflecting on learning, a structured time for the MEL team to look, interpret, and discuss data together drives greater learning.

### Dialogue and debate are critical for learning:

Spending time with grantees to review and discuss how programs are going and their challenges is crucial for promoting deeper learning.

# 6. Children's Investment Fund Foundation

## Foundation Overview

Children's Investment Fund Foundation (CIFF) is an independent philanthropic organization focused on systemic change. The organization works with a wide range of partners to transform the lives of children and adolescents.

**Headquartered:**
United Kingdom

**Geographic reach:**
Africa, India, East and Southeast Asia, Europe

**Year established:**
2002

**Key areas of work:**
Climate, health & nutrition, sexual and reproductive health and rights

**Estimated annual giving:**
USD 578 million (2023)

**Website link:**
https://ciff.org/

**Mission statement:**
The foundation strives to create a better, more equal world for children in which every child can flourish in a healthy, fair, and safe environment.

## What is the purpose of MEL within the Children's Investment Fund Foundation?

The purpose of MEL at the Children's Investment Fund Foundation is to increase the impact of its programs. Evidence has been core to grantmaking since CIFF's beginning. Evaluation data is used to identify critical factors that drive successful program implementation and scale up programs that are shown to work. Additionally, MEL enables insights into how the organization can contribute to policy and practice change.

The usability of the evaluation results is a significant consideration in all projects, significantly shaping how the MEL team designs new programs. The usability of results at program completion is also highly valued.

It is also noteworthy that CIFF has a strong evidence orientation among all staff and is committed to investing in sectoral evidence generation, especially in areas where evidence gaps exist.

> Our approach to evidence is evolving to match our entrepreneurial spirit. We are committed to using and generating, but we are also always looking to increase our emphasis on monitoring and operational research in order to generate actionable information faster. We're not in the business of carrying out evaluations just to have reports put out there. That is not the goal. The goal is to identify what works in terms of implementation of programs, how we can scale up impactful programs, and how we can contribute to improved policy and practice for the field . . .
>
> **—Corina Campian, CIFF**

## Children's Investment Fund Foundation's MEL team

- **Size of MEL team:**
  A dedicated MEL team is spread across different geographies.

- **Partnership with external evaluators:**
  CIFF works with external evaluators on larger investments where an externally commissioned evaluation is seen to add value. Additionally, evaluations may be commissioned when there is a strategic need to build up evidence on an intervention's effectiveness, coupled with leadership's interest.

- **Ways of working with the program team:**
  The MEL team closely supports the program team and is likened to a "critical friend" to the program team, providing feedback and support to the program team in developing investment proposals. The MEL staff reviews the proposed interventions' evidence, cost-effectiveness, and impact potential and identifies relevant outcomes and measurements. There is also a close partnership with grantees to deliberate and co-create evaluations.

## What are the evaluation criteria used in the Children's Investment Fund Foundation?

Larger evaluations are conducted with external evaluators. For other investments, the MEL team works closely with the grantees to measure and evaluate. There is a strong emphasis on co-creating the evaluation with grantees, although the evaluation scale differs based on their MEL capacity.

**Evaluation methods:** CIFF always tries to fit the methods with the research question; hence, it is not tied to any method. For some projects, an RCT would work well, but for others (e.g., strategic engagement or communications), this design is not feasible, and what may be more useful is to examine the most influential actors within a policy change area or to use qualitative methods to build an overall story of how change happens within the system. An evaluation often benefits from a variety of data sources.

## How does MEL inform learning in the Children's Investment Fund Foundation?

Internally, the MEL team prepares quarterly overviews of how investments are doing to inform CIFF's leadership in its review of existing and new investments. Additionally, the Organization encourages the program team to set up formal touchpoints (i.e., minimally once a year) with grantee partners to review progress, consider course corrections, and initiate changes that might be needed in project implementation.

CIFF is also invested in building grantees' MEL capacity as part of its commitment to ecosystem development. For example, supporting grantee partners with onboarding MEL positions in their respective organizations can yield more significant benefits and a more sustainable approach to evidence generation than other models (e.g., working with external consultants on a short-term basis). Another capacity-building approach has been the Evaluation and Leadership Training Program rollout in 2023, which focused on strengthening grantee partners' evaluation and organizational capabilities. The program focused on a range of thematic areas to provide growth for grantees beyond the lifetime of any specific program.

### Key learning drivers:

**An evaluative culture:**
There must be a culture where learnings from evaluation findings and other data sources are regularly shared (e.g., frequent meetings between program managers and grantees to discuss). It is beneficial to have intentional pauses within the foundation to take stock of learning and plan the way forward.

**Timely learning insights:**
Midline learning points in an evaluation or a program grant are useful for providing insights and timely changes instead of consolidating learnings only at the end of a program.

# 7. Lemann Foundation

## Foundation Overview

Lemann Foundation is a non-profit family organization in Brazil that is focused on improving public education and fostering leadership for social development in Brazil. Working with multiple co-investment and collaborative philanthropy partners locally and abroad, the Foundation funds innovative and scalable initiatives that can serve as a global model for equitable development.

**Headquartered:**
Brazil

**Geographic reach:**
Brazil

**Year established:**
2002

**Key areas of work:**
Education and leadership

**Estimated annual giving:**
Not known publicly

**Website link:**
https://fundacaolemann.org.br/en

**Mission statement:**
To make Brazil a more just and equitable place by guaranteeing access to high-quality public education for Brazilians of all backgrounds while supporting the development of leaders who are committed to the social transformation of Brazil.

## What is the purpose of MEL within the Lemann Foundation?

The primary purpose of MEL in the Lemann Foundation is to improve results and decisions through actionable insights from data feeding into what and how the foundation manages its investments and portfolios. Monitoring and evaluation are necessary to ensure that the investments are aligned with the foundation's goals, with revisions to strategies made based on data and research. Having originated from a results-driven business culture, the foundation emphasizes measurement to examine the direction and magnitude of change based on their work.

With a centralized MEL function, the foundation can more intentionally generate collective intelligence, harness the different processes, and develop more coherent policies towards MEL, such as the team's recent effort in structuring and validating the corporate policy for monitoring and evaluation in the organization. Compared to the past, where learnings from studies were scattered and possibly lost over time, investing in a centralized function enables an integrated approach to optimize and utilize learnings in decision-making.

> Something that's very important for us is really, trying to provide information that's relevant for decision-making, that's really actionable so it's not purely academic.
>
> **—Dr. Daniel De Bonis, Lemann Foundation**

### Lemann Foundation's MEL team

- **Size of MEL team:**
  The MEL team has seven multidisciplinary staff with quantitative and qualitative backgrounds
- **Partnership with external evaluators:**
  The Foundation partners with universities in their impact evaluations.
- **Ways of working with the program team:**
  The MEL team works closely with program teams in two ways: (1) direct support on a set pipeline of programs and (2) the setup of a "squad," which is a multidisciplinary team made up of staff from different departments working together to solve specific problems or achieve specific goals within a specific timeframe using the Objective and Key Result (OKR) framework. The latter way of working is new in the foundation and is designed to integrate different skills focused on a singular challenge.

## What are the evaluation criteria used in the Lemann Foundation?

The Lemann Foundation evaluates programs based on their strategic relevance to the foundation in areas such as portfolio management and alignment with the organization's goals.

**Evaluation methods:** While rigor in methodologies is highly valued, the foundation is open to different methods. However, it tries to incorporate various approaches that provide evidence of causality. The methods utilize highly rigorous designs, including RCT, quasi-experimental, and difference-in-differences (DID) designs. In addition, the foundation values qualitative approaches, especially for themes that are more challenging to evaluate quantitatively (e.g., advocacy efforts, systems change) and to gather information on what worked within the program that led to the outcomes (i.e., implementation evaluations). Qualitative approaches are useful for understanding change mechanisms.

## How does MEL inform learning in the Lemann Foundation?

The Lemann Foundation has established structures to facilitate internal and external learning with grantees.

Building the MEL capacity of grantees intentionally is imperative to the Lemann Foundation. The MEL team developed a rubric to measure the maturity of their grantees in monitoring and evaluation, and based on that, they are developing a strategy for how grantees can progress in their evaluation journey. The rubric is designed to understand the monitoring partner-grantees do, the use of ToCs, the types of impact evaluation conducted in the past, the types of methods used, and the use of peer review. In the foundation's baseline measurement of grantees' MEL capacities, the majority of grantees were found only to conduct monitoring and did not have a ToC. This enabled the foundation to understand how and where they need to build up the capacities of their partner-grantees.

Additionally, the Lemann Foundation is cultivating a learning community with grantees. Through this space, they are encouraged to share their challenges and doubts with the MEL team and highlight any concepts where they want to deepen their understanding. This space is also available for grantees to share and for the MEL team to bring experts to upskill knowledge.

The foundation holds half-yearly touch points, during which staff members working on an OKR project pause to examine their findings and consider what lessons could be derived from them. Additionally, the foundation has investment committees for all portfolios it works with, which meet two to four times a year. These committees use evaluation findings in their decision-making for fund allocation or strategies to help partners/grantees improve.

## Key learning drivers:

### Structuring learning cycles:

There is value in setting aside intentionally structured time in the organizational calendar to discuss and learn from data and findings in a timely manner to optimize and apply learnings to future work. As different portfolios work differently with varying time frames and data available, identifying when and how learning cycles could take place can be challenging.

### Creating an evaluative culture:

A data-driven mindset and continuous learning are critical for the foundation to make the best use of the insights it generates. This culture is developed over time, and the foundation sees the importance of building it in the way it works.

# 8. Mulago

## Foundation Overview

Mulago is a private foundation that focuses on solutions that meet the basic needs of the poorest families. Mulago finds and funds high-impact organizations that tackle the basic needs of the very poor, have scalable solutions and a demonstrated ability to deliver.

**Headquartered:**
USA

**Geographic reach:**
Global

**Year established:**
1993

**Key areas of work:**
Education, livelihoods (mainly smallholder farming), health, environment, energy, water and sanitation.

**Estimated annual giving:**
Not known publicly

**Website link:**
https://www.mulagofoundation.org/

**Mission statement:**
Mulago aims to improve the lives of the very poor by finding scalable solutions that meet their basic needs. Their job is to serve those who create change in the world.

## What is the purpose of MEL within Mulago?

Mulago performs a rigorous assessment of every organization they fund, examining the evidence in that sector, the gaps, and where the solution fits. Despite a big mandate, Mulago intentionally keeps a lean staff size, and every staff member is a generalist with a strong capability to interrogate data and evidence when examining the impact of a funded solution. Mulago also believes in challenging the organizations it funds to assess and improve what is meaningful impact and to improve over time.

A key focus of MEL is to inform an organization's scale strategy. Mulago believes that solutions must have a payer and doer at scale to have the likelihood of getting to an exponential scale. The findings are used to understand the scalability of the solution, as defined by four criteria:

- Is it good enough to have a lasting and consequential impact?
- Is it big enough? The overlap between the size of the need and where an organization's model would work roughly defines the potential. What constitutes "big enough" is variable (they like to think of it as "making a big dent in a big problem").
- Is it cheap enough? Solutions that are too expensive are not able to scale.
- Is it simple enough? A complicated model is hard to scale.

Mulago takes a straightforward approach to choosing metrics for impact measurement. They start by asking a simple but powerful question: What's the one best indicator that would prove the mission is accomplished?

Examples include:

Increase in farm income

Reduction in HIV infection rates

If they can measure that one thing, great. If not, they opt for a few well-chosen metrics instead. When a specific behavior is closely tied to impact, they'll use that as a proxy for impact. Mulago considers investment decisions too vague if an organization can't identify a measurable behavior.

Mulago focuses on measuring the change that results from behavior, not just abstract concepts. For them, it's not about capturing every possible impact—it's about answering the most critical question: Did the organization achieve its mission? For example, if the mission is to "get farmers out of poverty," a percentage increase in income for a farmer who makes a hundred dollars is not the same as for a farmer who makes thousands of dollars. The profile and starting point matter. It is, thus, essential to examine findings within the context and not be reductionistic.

> We really push people on . . . what is meaningful impact, and . . . we believe organizations that measure impact perform better and iterate faster.
>
> **—Dr. Kristin Gilliss Moyer, Mulago**

## Mulago's MEL team

- **Size of MEL team:**
  No dedicated MEL team.
- **Partnership with external evaluators:**
  Mulago encourages grantees to use external evaluators when they lack strong in-house research expertise. Additionally, Mulago highly encourages using external evaluators for rigorous evaluation design.
- **Ways of working with the program team:**
  This is not applicable without a MEL team.

## What are the evaluation criteria used by Mulago?

Many of Mulago's grantees conduct rigorous studies. However, Mulago notes that not every grantee is suitable for an RCT, or even should, as it often depends on the grantee's stage. If a grantee is in the early stages, it might not be worth the resources and energy to invest in an RCT. Instead, Mulago finds that valuable information can come from other forms of persuasive quantitative and qualitative data. Mulago does not dictate what data grantees must collect or how. Still, it emphasizes the need to measure impact and works with organizations to identify what "good enough" evidence would be for their stage.

What is needed in terms of evaluation depends on the evidence already known. For what is proven (e.g., bed nets reduce malaria), Mulago sees no need for further evaluations but instead focuses on program delivery. For areas without evidence of effectiveness, grantees must collect the data to make their case.

Mulago views the bar of evidence as going up over time. An innovation that started with research and development and less rigorous data would be accepted, but persuasive data is not enough over time. There needs to be a point of increased evaluation rigor.

**Evaluation methods:** Though rigorous designs such as RCTs are valued, Mulago recognizes that they are unsuitable for every program. Instead, it believes that ongoing monitoring and evaluation provide a more complete picture of the progressive learnings obtained from program implementation.

## How does MEL inform learning in Mulago?

Mulago's senior leadership team cares deeply about impact and learning and encourages staff to be inquisitive and ask the right questions to understand and learn. Mulago is strongly collaborative and supports staff by developing clear frameworks and tools for impact measurement and scaling. When portfolio teams submit recommendations or write-ups of organizations, the leadership expects the integration of different staff perspectives to represent what Mulago would think of the organization, encouraging frequent exchanges and deep reflection within the staff.

Through its fellowships program, Mulago encourages learning for fellows through facilitated peer learning and invited speakers with deep expertise. Past fellows are also invited back to share their scaling journey with the present fellows.

Mulago is interested in further understanding how their grantees can connect iteration and learning, especially with a rapid iteration process within complex social systems.

### Key learning drivers:

#### A leadership invested in impact:

While Mulago does not have a structured MEL team, senior leadership is highly invested in impact and learning. They are meticulous and critical in seeking to understand the studies behind the impact of all the organizations in their portfolio and their fellowships. These behaviors are modeled to the staff to cultivate a culture invested in impact.

# 9. Yayasan Hasanah

## Foundation Overview

Established in 2015, Yayasan Hasanah is the impact-based foundation of Khazanah Nasional Berhad, the sovereign wealth fund of Malaysia. An independent grant-making foundation, Yayasan Hasanah focuses on pressing local community, social and environmental issues through partnerships with stakeholders across the public and private spheres, enabling collective action to catalyze social impact at scale.

**Headquartered:**
Malaysia

**Geographic reach:**
Malaysia, but provides disaster relief support outside of Malaysia.

**Year established:**
2015

**Key areas of work:**
Education, community development, arts and public spaces, environment, knowledge.

**Estimated annual giving:**
USD 26 million

**Website link:**
https://yayasanhasanah.org/

## What is the purpose of MEL within Yayasan Hasanah?

MEL serves two functions in Yayasan Hasanah: accountability and learning. The findings inform and track their progress in creating impact to ensure that their funding efforts are focused and aligned with the foundation's mission. The foundation uses a results-based management approach for its MEL, starting with a ToC. In 2023, Yayasan Hasanah refreshed, sharpened, and extended its organizational ToC to 2030. Each impact area has a ToC to track its progress. MEL results are used by internal management to learn, inform decision-making, and report to external stakeholders on results achieved.

> . . .when we make decisions, approve grants, or decide to venture into a new area, . . . it must contribute to the ToC, which contributes to impact areas, which contribute to Yayasan Hasanah's strategy. So, it's important in terms of strategic alignment.
>
> **—Kuan Ming Foong, Yayasan Hasanah**

## Yayasan Hasanah's MEL team

- **Size of MEL team:**
  The organization's MEL team is part of a department with two roles: (i) Monitoring, Learning, and Evaluation (MLE), and (ii) Knowledge. There are seven members within the department.
- **Partnership with external evaluators:**
  Yayasan Hasanah conducts monitoring internally, while external evaluations are commissioned for more objective and independent evaluations.
- **Ways of working with the program team:**
  The MEL team works closely with the program teams to review grant applications. It usually does not interface directly with grantees. It views its role as more objective in critically appraising grant applications and reporting.

## What are the evaluation criteria used in Yayasan Hasanah?

Yayasan Hasanah's MEL team does not conduct evaluations but commissions evaluations when there is a need or strategic relevance for learning. For example, the foundation's community-based approach started about seven years ago and has been evolving over time. Yayasan Hasanah commissioned an evaluation to understand what had been done, what had evolved, what worked, and what did not. As many programs funded by Yayasan Hasanah are not long-term, it believes that not all projects will benefit from an evaluation. At the same time, there is no mandated requirement to include an evaluation as a component of program designs.

**Evaluation methods:** The foundation does not have a prescribed set of evaluation methods. Both quantitative and qualitative methods are valued. The methods differ by evaluation. They may include cost-benefit analysis, most significant change, and outcome harvesting, among others.

## How does MEL inform learning in Yayasan Hasanah?

The Knowledge Impact Area within the MEL department holds knowledge sessions internally and externally to facilitate learning for internal teams and grantees. These platforms include:

### Brown bag sessions (Internal):

These are casual knowledge-sharing sessions held by teams from different impact areas and departments over lunchtime. These sessions touch on the learnings obtained by the teams through their work (e.g., partnership and project journeys) and how they might be contextualized to local settings.

### Ilmu sessions (External):

Ilmu means “knowledge” in Malay. These are held every few months and are open to the public. They usually feature a panel of speakers who discuss issues related to the five Impact Areas.

### Capacity-building via Training:

In the past, the Foundation organized training for its grantees on monitoring and evaluation, community 9.5 leadership, participatory development, behavioral science, and media advocacy. The grantees' needs shaped the training as they implemented their projects.

### Participation in platforms and roundtables with other stakeholders (External).

### Hasanah Academy (External):

Hasanah Academy (External):
The MEL department has been developing an online learning platform for partners and grantees to access and build MEL capacity through online courses and videos. The initial main course will be on monitoring & evaluation.

Yayasan Hasanah is moving towards a greater emphasis on learning through more open discussions of what worked well and what did not, internally and externally. The foundation provides feedback on project monitoring data to grantees. It also incorporates learnings from past and ongoing program implementation to shape the next phase of new grant proposals.

## Key learning drivers:

### Explaining the rationale of MEL in simple terms:

Internally, explaining the rationale of MEL in simple, easy-to-understand terms (e.g., for learning, to improve project design, for more efficient monitoring, deeper impact) and avoiding technical jargon enhances staff understanding and buy-in. Helping the different departments understand how they can use findings from the MEL process to inform decision-making and how these findings can be shared externally to encourage greater use of MEL.

### Enhancing MEL knowledge and capacity with partners:

Grantees have varying understandings, skills, and expertise in monitoring and evaluation, affecting the conduct and use of relevant frameworks and tools. Yayasan Hasanah views strengthening grantees' monitoring and evaluation capabilities as essential. Through this process, Yayasan Hasanah hopes to contribute to enabling high-quality programs that are effective and sustainable, with a culture of constant learning.

# 10. Van Leer Foundation

## Foundation Overview

Founded in 1949, the Van Leer Foundation is an independent Dutch foundation that works globally to foster inclusive societies where all children and communities can flourish. They bring together people with different perspectives and support them to achieve large-scale impact. Van Leer's support includes a unique combination of funding, networks, executive education, technical assistance, and knowledge.

**Headquartered:**
The Netherlands

**Geographic reach:**
Global

**Year established:**
1949

**Key areas of work:**
Early childhood development

**Estimated annual giving:**
USD 15.2 million (2023)

**Website link:**
https://vanleerfoundation.org/

**Mission statement:**
The Van Leer Foundation is working worldwide to ensure that babies and toddlers have a good start in life.

## What is the purpose of MEL within the Van Leer Foundation?

MEL at the Van Leer Foundation is intended to examine whether funds spent in programs are being used in the most impactful ways and to continually improve their programming.

In 2024, the foundation crafted a new organizational strategy with eight outcomes. This strategy was cascaded down to the portfolios to align and sharpen activities according to the overall outcomes. Each portfolio has two to four clusters, each with a strategic goal and a ToC. The portfolio strategy is reviewed annually based on monitoring and evaluation data, enabling adjustment and sense-making sessions that reflect on the portfolio's ToCs.

Across the portfolios, the foundation has four mandated measurement dimensions—reach, leverage (i.e., financial leverage, in-kind leverage, which is split into infrastructure, human resources and materials, and influence leverage), caregiver well-being, and caregiver voices. The Van Leer Foundation allows for some flexibility to assess what is most meaningful to the program within these dimensions to accommodate the different stages of program implementation and data collection. For example, within caregiver wellbeing, the foundation is flexible to let the partner select from a wider array of specific indicators and tools to measure results, with the support of a guidance note and technical support from the foundation.

> We are constantly trying to improve. And we are constantly trying to make sure that we're working in the best way possible, and that we're adapting as we go.
>
> **—Dr. Darja Doberman, Van Leer Foundation**

## Van Leer Foundation's MEL team

- **Size of MEL team:**
  One staff member, the MEL technical expert. The technical expert provides technical assistance on selected strategic programs and reports across the foundation's global work.

- **Partnership with external evaluators:**
  In the last year, the foundation has increased the number of external evaluators engaged as dedicated MEL partners for their portfolios of work. The MEL staff works closely with these external evaluators to understand what is working within the programs, communicating at least monthly.

- **Ways of working with the program team:**
  The Van Leer Foundation increasingly values collaboration with the program teams. It seeks to increase MEL engagement with them to ensure that organizational MEL decisions at the strategic management level are not decided solely by the headquarters but have the active involvement of the program teams. Program teams are also involved in the monthly check-in meetings with the technical expert and the external evaluator assigned to portfolios, enabling close oversight of what is happening.

## What are the evaluation criteria used by the Van Leer Foundation?

The Van Leer Foundation tends to conduct more rigorous evaluations on larger projects over $100,000. Additionally, projects with the potential to scale accompanied by strong government interest are considered for evaluation. The foundation further considers evaluating programs that can strategically foster government interest.

The foundation does not view evaluation as always necessary, preferring to do mindful evaluation. Mindful evaluation is to consistently consider the questions: (a) "Does the intervention need to be evaluated?" and (b) "Does the intervention need to continue to be evaluated?" If sufficient evidence exists for the intervention in the wider field, an evaluation might be less beneficial, and monitoring data might suffice.

**Evaluation methods:** The foundation is open to various evaluation methods, such as outcomes harvesting, contribution analysis, and most significant change, to better understand its contribution to observed outcomes. Evaluation studies are outsourced to external evaluators.

## How does MEL inform learning in the Van Leer Foundation?

One way the Van Leer Foundation observed learning was through the learning facilitated by an evaluation partner in one of its portfolios. The evaluation partner successfully created an iterative learning and reflection process by discussing the evaluation findings and the next steps with the portfolio team. This process proved crucial in helping shift the program to create a more reflective culture. However, as external evaluators for the rest of the portfolios are newly hired, this learning process is not yet present for other program teams.

At the higher programmatic level, the foundation is becoming more intentional about revisiting the ToC in each portfolio at the end of every year to collectively assess how they did over that year. Itad conducted a global evaluation of the Van Leer Foundation's strategy last year, and the organization greatly benefitted from the learning to inform and drive decisions. Moving forward for the strategic period of 2024–2028, the Van Leer Foundation can plan for a midpoint and endpoint review for more timely insights compared to a retroactive evaluation.

Lastly, the foundation has built three questions into its reporting system for partners to provide input on what is working and what is not. At the portfolio level, the portfolio teams also report on key actions, innovations, achievements, and reflections on progress towards reaching their goals. This data will be useful for the foundation to continually learn and inform decisions.

## Key learning drivers:

### Create reflective spaces:

Program staff are often busy, and pausing for reflection can be challenging. Having formal moments to reflect facilitates deeper learning. An iterative learning process is vital to enable continual learning.

### Simplify MEL terms and make MEL engaging:

Explaining MEL using easy-to-understand terms and seeking to make it fun, engaging, and accessible through engagement with staff reduces staff hesitancy and reluctance to engage with it, resulting in greater buy-in.

### Early staff involvement:

Staff valued being asked early for their views on how MEL results and output can be structured (e.g., frameworks). The early involvement ensures that different members are heard and contributes to greater buy-in for the final MEL products.

### Bringing MEL to the decision-making spaces:

MEL is not regularly included in the decision-making or management spaces. Bringing MEL to the decision-making space can enable higher-quality conversations over evaluation and monitoring findings to drive decisions.

# Appendix A

## Methodology

**The research for this work was completed between May and September 2024 and consisted of four phases.**

### Phase 1:
### Literature Review and Identifying Priority Areas for Assessment

Tanoto Foundation and CEI reviewed 44 documents that included published MEL policies for 16 foundations. The review identified several areas foundations considered the highest priority in monitoring, evaluation, and learning. From a list of 15 priority areas, we selected five domains of interest to focus on in this study: (a) purpose/philosophy, (b) evaluation decision criteria (what and how), (c) learning, (d) roles and responsibilities, and (e) budget.

### Phase 2:
### Identifying and Assessing Participant Foundations

Based on Tanoto Foundation's and CEI's network and expertise, 45 potential foundations were longlisted based on the aims of this study. A desktop review was conducted to gather information on each organization. We prioritized each organization based on five criteria to obtain a list of relevant foundations working in similar areas to Tanoto Foundation.

Foundations selected for the study had a strong evidence orientation; had one or more of an education, early childhood development focus, or policy focus; operated globally, in East Asia, or in countries where Tanoto Foundation is most active; and represented a range of annual giving, from small to large. This generated 19 shortlisted foundations, with 11 on a priority list and eight on a secondary list. The Tanoto Foundation's senior leadership reviewed the list and identified foundations of particular interest. Based on this, a sample of 8-11 foundations was then targeted for this study.

## Phase 3:
## Recruiting and Conducting Interviews

We used a rolling invitation process. The foundations in the priority list were first invited to participate via email, with invitations extended through personal or institutional networks of the Tanoto Foundation or CEI leadership. Several institutions were contacted via LinkedIn or email where an existing connection was unavailable. For those who accepted, the team began scheduling interviews. A single foundation declined the invitation. In this case, we determined which organization on the secondary list constituted the best alternative and invited it to participate, which it accepted.

In total, 11 foundations accepted the invitation to participate. One foundation, Porticus, was in the midst of a review of MEL policies at the time of interview and therefore a case study was not developed, but the interviewee is cited. The interviews were conducted in July 2024. Participating individuals consented to having interviews recorded. Interviews were recorded and transcribed using AI software and then edited by a research team member.

## Phase 4:
## Analysis and Reporting

All interview transcripts were analyzed using framework analysis. Framework analysis is characterized by a systematic and organized structure that allows researchers to analyze qualitative data through a predefined framework. This framework was also applied to the findings of the literature review. The findings were integrated into a final report, developed around themes deemed the most relevant to MEL practitioners and leaders making decisions about using evidence within philanthropy. All quotes and case studies were verified by the participating foundations to secure consent for the use of direct quotes.

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