Across-the-Board Contradictions: Re-aligning foundation trustees to incentivize learning

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Social change as dynamic, emergent, negotiated, relational

Learning requires ongoing way-finding through uncertainty and ambiguity, observing not only outcomes but also how others are responding to our actions, and adapting accordingly.
Board room interactions and artifacts incentivize and reward the projection of certainty and control, leaving little space to grapple with unknowns.
Using pre-set, fixed indicators of as the principle “mechanisms” for accountability
Frame **new accountability questions** to focus on how staff are responding to the insights, feedback, and data that help them navigate complexity and move closer to the goals and values.

- **Resistance from counter-interests**
- **Different goal is negotiated with other actors**
- **Partners re-shape pathway**
- **Interim Outcome**
- **Turns out we guessed wrong!**
Plan for— and invite—outcomes to EVOLVE as actors debate what matters, interpret signals, negotiate how to move forward, and learn what works.

- What signals are we seeing and what do we think they mean?
- Do these outcomes still reflect what our communities/grantees/partners are aiming for?
- Given what we’ve learned, are these still the right outcomes to focus on?
- How should outcomes shift?
The Tyranny of the “BHAG”  
(Big Hairy Audacious Goal)

Making promises about outcomes that far outpace the resources the foundation and grantees have at their disposal and the time frame of the investment or reporting period.

PROBLEMATIC HABIT 2

- Over-claiming, hiding challenges and disappointments
- Drawing conclusions too prematurely or erroneously (accelerated by our inherent biases)
- Focusing on data that doesn’t reveal anything about your effectiveness – and thus doesn’t help you become more effective

Incentivizes...
Set “north star” goals...

but right-size expectations for outcomes to those that are within the sphere of control and influence of you and partners in the nearer term.

Spheres adapted from The Seven Habits of Highly Effective People by Stephen R. Covey, Simon & Schuster 1992.
Track and reflect on changes in aspirational outcomes:

• As “vital signs” about the system you’re working in
• And to hold line of sight to the orienting goal.

Focus on what are you directly responsible for that determines organizational effectiveness given the current work and state of the system?
Foundations often exhaust their evaluative and reporting energy on quantitative indicators --and grantees count what’s countable-- to describe change.

PROBLEMATIC HABIT 3

Too little focus on how or why change happens.

Incorrectly and inequitably generalizing conclusions without context

Leaving rich learning inputs on the table.

Ending the conversation without exploration of implications and adaptation.
Re-focus data and conversation on understanding 2-3 critical questions deeply and from multiple perspectives rather than measuring everything countable.

Focus systematic methods or more robust evaluation where there is uncertainty or opacity.

Re-situate the data as the starting point for the conversation rather than the ending point.
ALTERNATIVE

Re-distribute board meeting time and the content of write-ups more evenly across the what / so what / now what cycle

**What?**
What did we observe about what happened and why?

**So What?**
What insights can we draw from what we observed?

**Now What?**
What implications do these insights have for future work?

From *Introduction to Adaptive Action*, by Glenda Eoyang
Human Systems Dynamics Institute
How will staff rigorously observe what happens next as a result of these adaptations?

Can we see how these insights have informed adaptations?

Do the insights staff draw from the data make sense?

What did we observe about what happened and why?

What insights can we draw from what we observed?

What implications do these insights have for future work?

So What?

Now What?
You don’t plan a strategy, you learn a strategy.

Henry Mintzberg