BENCHMARKING FOUNDATION LEARNING AND EVALUATION PRACTICES 2023
About the Center for Evaluation Innovation

We are a nonprofit with a mission to partner with philanthropy to provide changemakers the space and resources needed to advance racial justice and create an equitable future. We partner with philanthropy on strategy, learning, and evaluation efforts that are intended to advance racial equity and justice. We lead evaluation projects; consult with foundations on strategy and learning; and support field building through convening, organizing, and research. Benchmarking Foundation Learning and Evaluation Practices 2023 is part of the Evaluation Roundtable, a platform for peer learning about learning and evaluation in philanthropy that we host and coordinate.

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Gratitude & Acknowledgements
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GRAPHEK designed this report. GRAPHEK.com

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About the Research

The Center for Evaluation Innovation (CEI) administered the Evaluation Roundtable benchmarking survey in spring 2023. This research has been tracking trends in how foundations structure, staff, resource, and prioritize the work of their learning and evaluation function (previous efforts were in 2009, 2012, 2015, and 2019).

Research Approach

The survey data contained in this report is part of a mixed-methods research design focused on exploring:

1. The current landscape of foundation learning and evaluation practices and how they have evolved over time.
2. Identifying signals that show whether and how foundation learning and evaluation practices contribute to racial equity and social justice.
3. Documenting ways in which foundations are experimenting with fostering learning and evaluation work that advances racial equity and social justice.

Upon releasing this report, CEI will conduct an in-depth examination of select survey data points using qualitative methods. Our goal is to engage the sector in collaborative discussions to derive shared insights from the findings.

Sample

CEI sent the survey to 565 independent and community foundations with an annual grantmaking budget of at least $10 million annually in the previously reported fiscal year, or that engage with the Evaluation Roundtable, or both. Foundation information was purchased from Candid, a nonprofit that tracks data about nonprofits and foundations. A total of 106 foundations completed the survey, a 19 percent response rate.

Our benchmarking research is the most comprehensive review of learning and evaluation practices in philanthropy. The survey results presented in this report provide a snapshot of the practices prevalent in 2023 and do not necessarily define the standard of what is considered “good.” However, the data have the potential to ignite meaningful conversations and foster valuable connections. They prompt questions such as how evaluation activities can be prioritized and how foundations can effectively structure and staff their learning and evaluation functions.

We hope this report assists foundations in shaping their learning and evaluation efforts, bringing us closer to a more equitable future.

As each section opens, we offer questions to support your own interpretation of the data and reflection on your foundation’s positioning and practice.
Respondent Characteristics
In 2023, nearly **2 out of 3** respondents had **Learning** in their job title, and over half of respondents had **Evaluation** in their job title. Both represented increases compared to 2015 and 2019.

**TOP KEY WORDS IN RESPONDENT JOB TITLES**

- Learning: 19% (2015), 37% (2019), 65% (2023)
- Evaluation: 34% (2015), 40% (2019), 55% (2023)
- Strategy: 13% (2015), 17% (2019), 18% (2023)
- Impact: 5% (2015), 11% (2019), 18% (2023)
- Research: 11% (2015), 16% (2019), 13% (2023)
- Measurement: 1% (2015), 15% (2019), 7% (2023)

n(2015) = 127, n(2019) = 103, n(2023) = 161
Respondent Characteristics

About half of respondents had up to 7 years of experience working in philanthropy.

1 in 2 respondents have held learning and evaluation responsibilities at their foundation for between 1 and 5 years.

Most respondents were white, women, and between the ages of 35 and 49.

No respondent selected a non-binary gender, although offered. Respondents could select more than one racial category, so the sum totals to more than 100%.
Reflection Questions

Foundation Context
1. What one to two core values does your organization hold as priority?
2. What does your foundation want to accomplish over the next 1-3 years?
3. How does your organization use or share power with communities it intends to serve?

Learning and Evaluation Alignment
4. What is the purpose of the foundation’s learning and evaluation function?
5. To what extent does this purpose align with the foundation’s values and direction?
Nearly 2 in 3 respondents worked in independent foundations, and about 2 in 5 foundations gave up to $50 million annually.
# Foundation Characteristics

## Foundation Changes in the Past 3 Years

<table>
<thead>
<tr>
<th>Change in the Foundation</th>
<th>2019</th>
<th>2023</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organization-wide Diversity, Equity, and Inclusion (DEI) efforts</td>
<td>56%</td>
<td>78%</td>
</tr>
<tr>
<td>Organizational/staff restructuring</td>
<td>61%</td>
<td>63%</td>
</tr>
<tr>
<td>Organization-wide strategic planning or strategy refresh</td>
<td>61%</td>
<td>58%</td>
</tr>
<tr>
<td>Shift in priority issues in program areas</td>
<td>47%</td>
<td>59%</td>
</tr>
<tr>
<td>Change in the grants management system</td>
<td>39%</td>
<td>47%</td>
</tr>
<tr>
<td>CEO transition</td>
<td>30%</td>
<td>33%</td>
</tr>
<tr>
<td>Change in mission</td>
<td>11%</td>
<td>13%</td>
</tr>
</tbody>
</table>

*Survey participation included 154 foundations in 2019 and 101 foundations in 2023.*

Nearly two thirds of foundations gathered input from grantees and communities about the foundation’s programmatic focus.

1% of foundations reported coming to consensus with grantees and communities about the foundation’s programmatic focus.

## Extent of Programmatic Decision-Making Power Shared with Grantees and Communities

<table>
<thead>
<tr>
<th>Grantees and/or communities</th>
<th>are not included</th>
<th>are informed</th>
<th>provide input</th>
<th>move to consensus with the foundation</th>
<th>have full control</th>
</tr>
</thead>
<tbody>
<tr>
<td>10%</td>
<td>27%</td>
<td>61%</td>
<td>1%</td>
<td>0%</td>
<td></td>
</tr>
</tbody>
</table>

*Survey participation included 98 foundations in 2023.*
Structuring & Leading

Reflection Questions

1. To what extent do those managing the learning and evaluation work have the positional power to shape its direction and implementation?

2. What are the advantages and disadvantages of placing learning and evaluation leaders at various levels within the organizational hierarchy?

3. What power do senior managers and board members wield in furthering the purpose of learning and evaluation?
Learning and evaluation staff who report to the CEO has continued to decrease since 2015, while those who report to non-program executive staff are on the rise.

In 2023, fewer staff members (15%) are responsible for learning as a separate function from evaluation compared to 2019 (21%).

Learning and evaluation staff reported being more likely to be housed in a unit separate from the program unit or department, a shift from previous years.
Unit names are seeing less change with 69% in 2023 reporting no change during the past three years. Of those who have seen unit name changes, “learning” and “evaluation” continue to have a strong presence.

n(2015) = 42; n(2019) = 66; n(2023) = 94

Unit names with Learning surpassed those with Evaluation for the first time.

Program and Impact saw increases, Research saw a decline, and Strategy is holding steady.
64% of respondents reported an appropriate amount of senior management engagement in communicating to staff that they value the use of evaluation or evaluative information.

45% report too little or no investment in the learning and evaluation capacity of each foundation staff and grantees.

<table>
<thead>
<tr>
<th>Level of Engagement</th>
<th>None</th>
<th>Too little</th>
<th>Appropriate amount</th>
<th>Too much</th>
</tr>
</thead>
<tbody>
<tr>
<td>Communicating to staff that it values the use of evaluation and evaluative information</td>
<td>1%</td>
<td>33%</td>
<td>64%</td>
<td>1%</td>
</tr>
<tr>
<td>Considering the results of evaluation work as an important criterion when assessing strategy</td>
<td>1%</td>
<td>44%</td>
<td>55%</td>
<td>2%</td>
</tr>
<tr>
<td>Supporting adequate investment in the learning and evaluation capacity of foundation staff</td>
<td>2%</td>
<td>42%</td>
<td>51%</td>
<td>2%</td>
</tr>
<tr>
<td>Supporting learning and evaluation work so that it helps to advance equity</td>
<td>7%</td>
<td>40%</td>
<td>51%</td>
<td>2%</td>
</tr>
<tr>
<td>Modeling the use of information resulting from evaluation work in decision-making</td>
<td>9%</td>
<td>36%</td>
<td>49%</td>
<td>2%</td>
</tr>
<tr>
<td>Supporting adequate investment in the learning and evaluation capacity of grantees</td>
<td>1%</td>
<td>5%</td>
<td>9%</td>
<td>2%</td>
</tr>
</tbody>
</table>

n(2023) = 96

Item totals may not add up to 100% because they exclude “don’t know” responses.
LEVEL OF BOARD SUPPORT

<table>
<thead>
<tr>
<th>Measure</th>
<th>None</th>
<th>Little</th>
<th>Moderate</th>
<th>High</th>
</tr>
</thead>
<tbody>
<tr>
<td>The role of learning and evaluation staff at the foundation</td>
<td>2%</td>
<td>8%</td>
<td>27%</td>
<td>61%</td>
</tr>
<tr>
<td>Use of evaluation or evaluative data in decision-making by staff at the foundation</td>
<td>1%</td>
<td>12%</td>
<td>22%</td>
<td>65%</td>
</tr>
<tr>
<td>Foundation spending on learning and evaluation</td>
<td>2%</td>
<td>11%</td>
<td>33%</td>
<td>53%</td>
</tr>
<tr>
<td>Use of evaluation or evaluative data in developing strategy</td>
<td>1%</td>
<td>17%</td>
<td>26%</td>
<td>56%</td>
</tr>
<tr>
<td>Use of evaluation or evaluative data in board-level decision-making</td>
<td>4%</td>
<td>14%</td>
<td>29%</td>
<td>52%</td>
</tr>
<tr>
<td>Use of evaluation or evaluative data so that it helps to advance equity</td>
<td>8%</td>
<td>19%</td>
<td>34%</td>
<td>38%</td>
</tr>
</tbody>
</table>

n(2023) = 87

HIGH LEVELS OF BOARD SUPPORT

- **65%** Use of evaluation- or evaluative data in decision making by staff at the foundation
- **61%** The role of learning and evaluation staff at the foundation
- **56%** Use of evaluation- or evaluative data in developing strategy
- **53%** Foundation spending on learning and evaluation
- **52%** Use of evaluation- or evaluative data in board-level decision making
- **38%** Use of evaluation- or evaluative data so that it helps to advance equity

Reports of high support from foundation boards for learning and evaluation rose in 2023 compared to 2015 and 2019, with the largest jumps including **foundation spending** on learning and evaluation and using evaluation in **board-level decision-making**.
Staffing

Reflection Questions

1. Who is seen as responsible for learning and evaluation, and what roles do learning and evaluation staff play versus program staff?

2. What knowledge, skills, and lived experience are needed to achieve the purpose of learning and evaluation in your organization?

3. To what extent does your learning and evaluation staffing align with your needs and organizational values?
Staffing

Foundations had 11 full-time program staff to every learning and evaluation staff, a narrower ratio compared to 2019 when it was almost 16 to 1.

The median number of program staff has increased over time whereas the median number of learning and evaluation staff has remained relatively constant.

### LEARNING AND EVALUATION STAFF TO PROGRAM STAFF

<table>
<thead>
<tr>
<th>Year</th>
<th>Learning and evaluation staff</th>
<th>Program staff</th>
</tr>
</thead>
<tbody>
<tr>
<td>2023</td>
<td><img src="image1.png" alt="Diagram" /> 11.0</td>
<td></td>
</tr>
<tr>
<td>2019</td>
<td><img src="image2.png" alt="Diagram" /> 15.8</td>
<td></td>
</tr>
<tr>
<td>2015</td>
<td><img src="image3.png" alt="Diagram" /> 9.7</td>
<td></td>
</tr>
</tbody>
</table>

Program staff: n(2015) = 118; n(2019) = 156; n(2023) = 102
Learning and evaluation staff: n(2015) = 127; n(2019) = 161; n(2023) = 103

### MEDIAN PROGRAM AND LEARNING AND EVALUATION STAFF

<table>
<thead>
<tr>
<th>Year</th>
<th>Program staff</th>
<th>Learning and evaluation staff</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>14.5</td>
<td>1.5</td>
</tr>
<tr>
<td>2019</td>
<td>15.8</td>
<td>1.0</td>
</tr>
<tr>
<td>2023</td>
<td>22.0</td>
<td>2.0</td>
</tr>
</tbody>
</table>

Program staff: n(2015) = 118; n(2019) = 156; n(2023) = 102
Learning and evaluation staff: n(2015) = 127; n(2019) = 161; n(2023) = 103
Foundations with annual giving up to $50 million and over $200 million are trending closer to their 2015 staffing sizes, with smaller foundations reporting 8 program staff for every 1 learning and evaluation staff and larger foundations reporting 16 to 1.

Foundations with $50 to $200 million in annual giving, however, are showing more program staff to every learning and evaluation staff compared to 2015 and 2019.

Program staff: n(2015) = 113; n(2019) = 67; n(2023) = 77
Learning and evaluation staff: n(2015) = 120; n(2019) = 68; n(2023) = 77

These data only include information from respondents who had associated annual giving data.
About half of all learning and evaluation staff are people of color, a **10% increase** from 2019. **Black** and **Latine** people saw the biggest increases compared to 2019.

In 2023, learning and evaluation staff were 50% people of color versus 40% in 2019.

More than half of **senior staff** are **people of color**.

**RACE OF SENIOR AND OTHER LEARNING AND EVALUATION STAFF**

<table>
<thead>
<tr>
<th>People of color</th>
<th>White</th>
</tr>
</thead>
<tbody>
<tr>
<td>Most senior staff person</td>
<td>55%</td>
</tr>
<tr>
<td>Staff</td>
<td>43%</td>
</tr>
</tbody>
</table>

n(2023) = 98

*Prefer to describe was offered as an open text response option.*
Reflection Questions

1. What activities do learning and evaluation staff prioritize and why?

2. What aspects of their roles demand the most time and attention? Does this line up with their priorities? What aspects of their roles need more or less attention?

3. What is most rewarding and most challenging about the foundation’s learning and evaluation work? How can the foundation experiment with ways of addressing the challenges?
More learning and evaluation staff are directing and managing all or most work related to learning and evaluation, versus advising other staff who manage it or using third parties.

Most participants who selected “a different way” described a balanced mix among these options, with some mentioning that their foundations are in the process of defining this arrangement.
Responsibilities & Challenges

Learning and evaluation staff spent the most time designing and facilitating learning processes and events within their organization in 2023. Time spent on that responsibility showed the largest increase in rank from 2015.

The top prioritized responsibilities that respondents selected spending time on have remained relatively unchanged over time.

Evaluating foundation initiatives or strategies has remained the top priority across all three time periods.

**TOP 5 RESPONSIBILITIES THAT FOUNDATIONS SPEND TIME ON IN 2023**

1. Designing and/or facilitating learning processes or events within the foundation
2. Evaluating foundation initiatives or strategies
3. Providing research or data to inform grantmaking strategy
4. Orienting learning and evaluation work so that it helps to advance equity
5. Compiling and/or monitoring metrics to measure foundation performance

n(2015) = 123; n(2019) = 145; n(2023) = 101

Many respondents who selected “another activity” described building their foundation’s learning and evaluation culture. Others reported data development and knowledge management as additional activities. These top responsibilities were selected from a list of 13 options.

**TOP 5 RESPONSIBILITIES THAT LEARNING AND EVALUATION STAFF PRIORITIZE IN 2023**

1. Evaluating foundation initiatives or strategies
2. Designing and/or facilitating learning processes or events within the foundation
3. Compiling and/or monitoring metrics to measure foundation performance
4. Providing research or data to inform grantmaking strategy
5. Orienting learning and evaluation work so that it helps to advance equity

n(2015) = 123; n(2019) = 145; n(2023) = 99
Responsibilities & Challenges

The top 5 responsibilities prioritized by learning and evaluation staff in 2023 were also the top 5 they spent the most time on.

Responsibilities that were not in the top 5 had bigger discrepancies between prioritization and what they spent time on.

### Responsibilities That Learning and Evaluation Staff Prioritize and Spend Time On

<table>
<thead>
<tr>
<th>% that prioritize as top 4</th>
<th>% that spend time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Designing and/or facilitating learning processes or events within the foundation</td>
<td>90%</td>
</tr>
<tr>
<td>Evaluating foundation initiatives or strategies</td>
<td>83%</td>
</tr>
<tr>
<td>Providing research or data to inform grantmaking strategy</td>
<td>82%</td>
</tr>
<tr>
<td>Orienting learning and evaluation work so that it helps to advance equity</td>
<td>78%</td>
</tr>
<tr>
<td>Compiling and/or monitoring metrics to measure foundation performance</td>
<td>74%</td>
</tr>
<tr>
<td>Conducting/commissioning satisfaction/perception surveys (of grantees or other stakeholders)</td>
<td>64%</td>
</tr>
<tr>
<td>Developing grantmaking strategy</td>
<td>60%</td>
</tr>
<tr>
<td>Improving grantee capacity for data collection or evaluation</td>
<td>57%</td>
</tr>
<tr>
<td>Disseminating evaluation findings externally</td>
<td>57%</td>
</tr>
<tr>
<td>Refining grantmaking strategy during implementation</td>
<td>55%</td>
</tr>
<tr>
<td>Designing and/or facilitating learning processes or events with grantees or other external stakeholders</td>
<td>55%</td>
</tr>
<tr>
<td>Evaluating individual grants</td>
<td>44%</td>
</tr>
<tr>
<td>Another activity</td>
<td>16%</td>
</tr>
</tbody>
</table>

**Priority rank for developing grantmaking strategy** has increased the most from 2015 (from 10th to 6th) and **improving grantee capacity for data collection or evaluation** has decreased the most from 2015 (from 6th to 10.5).

**Time spent on designing/facilitating learning processes and events within the foundation** has increased the most from 2015 (from 10th to 6th) and **refining grantmaking strategy** has decreased the most from 2015 (from 3rd to 10.5).

n(2023) = 99, 101
LEARNING AND EVALUATION STAFF WITH PROGRAMMATIC GRANTMAKING RESPONSIBILITIES

Far fewer learning and evaluation staff reported having programmatic grantmaking responsibilities in 2023 compared to 2019 and 2015.

When supporting other foundation staff on learning activities, learning and evaluation staff spend most of their time developing learning plans or agendas, and the least amount of time attending to cognitive biases.

LEARNING ACTIVITIES THAT LEARNING AND EVALUATION STAFF SUPPORT OTHERS ON

<table>
<thead>
<tr>
<th>Activity</th>
<th>Never</th>
<th>Sometimes</th>
<th>About half the time</th>
<th>Most of the time</th>
<th>Always</th>
</tr>
</thead>
<tbody>
<tr>
<td>Developing learning plans or agendas [e.g., shaping questions and describing how/when those will get answered]</td>
<td>6%</td>
<td>17%</td>
<td>19%</td>
<td>34%</td>
<td>24%</td>
</tr>
<tr>
<td>Identifying the hypotheses and assumptions being made about the work</td>
<td>4%</td>
<td>26%</td>
<td>18%</td>
<td>33%</td>
<td>18%</td>
</tr>
<tr>
<td>Examining the cause and effect relationships between actions and outcomes</td>
<td>7%</td>
<td>38%</td>
<td>15%</td>
<td>25%</td>
<td>14%</td>
</tr>
<tr>
<td>Attending to cognitive biases that affect how to interpret data [e.g., confirmation bias]</td>
<td>15%</td>
<td>44%</td>
<td>11%</td>
<td>15%</td>
<td>11%</td>
</tr>
</tbody>
</table>

n(2023) = 96

Sums do not total to 100% because the percentage associated with “not applicable” are not shown.

Center for Evaluation Innovation

Benchmarking Foundation Learning and Evaluation Practices 2023
Responsibilities & Challenges

Respondents reported that the most challenging evaluation effort was developing measures that capture complexity.

7 in 10 foundations reported being moderately or very challenged by identifying third-party evaluators who practice equity- or justice-oriented evaluation.

LEVEL OF CHALLENGE FOR EVALUATION EFFORTS

- Developing measures that capture complexity
  - Not at all: 2%
  - Slightly: 14%
  - Moderately: 20%
  - Very: 64%

- Having evaluations result in useful lessons for grantees
  - Not at all: 8%
  - Slightly: 22%
  - Moderately: 40%
  - Very: 30%

- Having evaluations result in meaningful insights for the foundation
  - Not at all: 10%
  - Slightly: 21%
  - Moderately: 33%
  - Very: 36%

- Identifying third-party evaluators who practice equity- or justice-oriented evaluation
  - Not at all: 11%
  - Slightly: 27%
  - Moderately: 36%
  - Very: 26%

- Incorporating evaluation results into the way the foundation will approach its work in the future
  - Not at all: 11%
  - Slightly: 29%
  - Moderately: 35%
  - Very: 25%

- Having evaluations result in useful lessons for the field
  - Not at all: 17%
  - Slightly: 25%
  - Moderately: 45%
  - Very: 13%

- Identifying third-party evaluators that produce high-quality work
  - Not at all: 28%
  - Slightly: 31%
  - Moderately: 24%
  - Very: 17%

- Allocating sufficient monetary resources for evaluation efforts
  - Not at all: 13%
  - Slightly: 49%
  - Moderately: 30%
  - Very: 8%

- Having foundation staff and grantees agree on the goals of the evaluation
  - Not at all: 26%
  - Slightly: 40%
  - Moderately: 29%
  - Very: 5%

- Having programmatic staff and third-party evaluators agree on the evaluation goals

n(2023) = 94

Respondents who selected “another effort” (not displayed) had wide-ranging responses including challenges with synthesizing cross-program evaluative work, resources for engaging with grantees, assessing foundation attribution and contribution, finding evaluators of color or ones who work with spend-down foundations, clarifying and accessing useful evidence and data, and viewing evaluation as central to equity work.
Responsibilities & Challenges

Foundations continue to be challenged having evaluations result in **useful lessons for grantees** and **meaningful insights for the foundation**.

**TOP VERY AND MODERATELY CHALLENGING EVALUATION EFFORTS**

1. Developing measures that capture **complexity**
2. Having evaluations result in **useful lessons for grantees**
3. Having evaluations result in **meaningful insights for the foundation**
4. Identifying **third-party evaluators** who practice **equity** or **justice**-oriented evaluation
5. Incorporating evaluation results into the way the foundation will approach its work in the **future**
6. Having evaluations result in **useful lessons for the field**
7. Identifying **third-party evaluators** who produce **high-quality work**
8. Allocating **sufficient monetary resources** for evaluation efforts

\( n(2015) = 122; n(2019) = 140; n(2023) = 94 \)

These top evaluation efforts were selected from a list of 11 options (see top graph on this page for the full list).
Conducting & Communicating Evaluation

Reflection Questions

1. How does your organization plan, implement, and use evaluation? For whom is learning and evaluation?

2. Who makes key learning and evaluation decisions, such as how success is defined or which questions should be answered?

3. What is the nature of your foundation’s relationship with its grantees throughout the evaluation process?
Conducting and Communicating Evaluation

In 2023, foundations regularly focused on team member diversity and alignment with equity values; they less frequently focused on equity-related evaluation design considerations.

Mostly, foundations gather input from grantees and communities on evaluative decisions.

About 1 in 4 respondents reported that their foundation moves to consensus with grantees or communities in deciding what programmatic success looks like.

The frequency of regularly considering the diversity of teams when conducting or commissioning evaluations rose from 52% in 2019 to 76% in 2023.

EVALUATION DECISION-MAKING POWER SHARED WITH GRANTEES AND COMMUNITIES

<table>
<thead>
<tr>
<th>GRANTEES OR COMMUNITIES...</th>
<th>are not included</th>
<th>are informed</th>
<th>provide input</th>
<th>move to consensus with the foundation</th>
<th>have full control</th>
</tr>
</thead>
<tbody>
<tr>
<td>what programmatic success looks like</td>
<td>8%</td>
<td>15%</td>
<td>48%</td>
<td>23%</td>
<td>5%</td>
</tr>
<tr>
<td>what the data mean</td>
<td>5%</td>
<td>22%</td>
<td>42%</td>
<td>23%</td>
<td>8%</td>
</tr>
<tr>
<td>the evaluation questions</td>
<td>13%</td>
<td>17%</td>
<td>39%</td>
<td>28%</td>
<td>2%</td>
</tr>
<tr>
<td>how to act on findings</td>
<td>13%</td>
<td>22%</td>
<td>43%</td>
<td>14%</td>
<td>8%</td>
</tr>
<tr>
<td>from whom to collect data</td>
<td>15%</td>
<td>20%</td>
<td>36%</td>
<td>18%</td>
<td>11%</td>
</tr>
<tr>
<td>how to communicate findings</td>
<td>18%</td>
<td>31%</td>
<td>31%</td>
<td>15%</td>
<td>5%</td>
</tr>
</tbody>
</table>

n(2023) = 95

Foundations that prioritize equity in learning and evaluation work are more likely to give grantees more decision-making power. (F[1, 88], p<0.001)
Mostly, foundations occasionally conduct or commission developmental, formative, and summative evaluations. Similar to previous years, about 1 in 4 foundations regularly conducts or commissions summative evaluation.
Foundations tended to share evaluation findings slightly more often in 2023 compared to 2019. Respondents continued to be more likely to share findings internally than externally.

n(2019) = 138; n(2023) = 96

*In 2019, this item was “the general public.”
Financing

Reflection Questions

1. What are the funding levels allocated for learning and evaluation, and how do they compare to programmatic levels?

2. What is the budget for learning and evaluation contracts and grants? Why are contract and grantmaking learning and evaluation budgets allocated in that way?

3. To what extent does funding for learning and evaluation align with and support the overall purpose of learning and evaluation within your organization?
Financing

Most respondents in 2023 reported that their learning and evaluation funding levels had stayed about the same or increased over the past two years relative to the size of the program budget.

A higher percentage of respondents reported a decrease in learning and evaluation funding levels compared to 2019 and 2015.

The response options “decreased dramatically” and “decreased somewhat” were collapsed in this visualization to “decreased” as were “increased dramatically” and “increased somewhat” into “increased.”

LEARNING AND EVALUATION UNITS OR DEPARTMENTS WITH THEIR OWN GRANTMAKING OR CONTRACTING BUDGET

Compared to 2019, there was a slight increase in the percentage of respondents who report that their learning and evaluation units or departments have either their own grantmaking or contracting budgets, rising from 68% to 76%, a value closer to that reported in 2015, which was 79%.
Financing

**Foundations that gave more than $200 million annually more often reported having a contract or grant budget for learning and evaluation compared to smaller and mid-sized foundations.**

Respondents at foundations that gave more than $50 million annually more often reported spending less on contracts or grants for external learning and evaluation services in 2023 compared to 2019.

The learning and evaluation budgets for foundations with up to $50 million in annual giving remained relatively stable.

---

**LEARNING AND EVALUATION UNITS WHO HAVE THEIR OWN GRANTMAKING OR CONTRACTING BUDGETS BY ANNUAL GIVING**

<table>
<thead>
<tr>
<th>Budget</th>
<th>Has a grant and/or contract budget</th>
<th>Doesn’t</th>
</tr>
</thead>
<tbody>
<tr>
<td>Over $200M</td>
<td>88%</td>
<td>13%</td>
</tr>
<tr>
<td>$50M to $200M</td>
<td>79%</td>
<td>21%</td>
</tr>
<tr>
<td>Up to $50M</td>
<td>77%</td>
<td>23%</td>
</tr>
</tbody>
</table>

n(2023) = 75

These data only include information from respondents who reported having a learning and evaluation budget and who had associated annual giving data.

---

**LEARNING AND EVALUATION UNIT OR DEPARTMENT GRANTMAKING AND/OR CONTRACTING BUDGETS BY ANNUAL GIVING**

<table>
<thead>
<tr>
<th>Budget</th>
<th>Annual Giving</th>
</tr>
</thead>
<tbody>
<tr>
<td>$2.0M</td>
<td>$1.9M</td>
</tr>
<tr>
<td>$1.5M</td>
<td>$1.2M</td>
</tr>
<tr>
<td>$1.0M</td>
<td>$0.5M</td>
</tr>
<tr>
<td>$50M to $200M</td>
<td>$550K</td>
</tr>
<tr>
<td>Over $200M</td>
<td>$490K</td>
</tr>
</tbody>
</table>

n(2019) = 22; n(2023) = 54

These data only include information from respondents who reported having a learning and evaluation budget and who had associated annual giving data.
Financing

29% of foundations spent **more than $1 million** on external learning and evaluation grants or contracts in 2023.

**SPENDING ON LEARNING AND EVALUATION GRANTS OR CONTRACTS**

<table>
<thead>
<tr>
<th>Range</th>
<th>2019</th>
<th>2023</th>
</tr>
</thead>
<tbody>
<tr>
<td>Over $10M</td>
<td>3%</td>
<td>4%</td>
</tr>
<tr>
<td>$1M to $10M</td>
<td>22%</td>
<td>25%</td>
</tr>
<tr>
<td>$200K to $1M</td>
<td>18%</td>
<td>34%</td>
</tr>
<tr>
<td>$100K to $200K</td>
<td>11%</td>
<td>7%</td>
</tr>
<tr>
<td>$50K to $100K</td>
<td>17%</td>
<td>8%</td>
</tr>
<tr>
<td>$1 to $50K</td>
<td>18%</td>
<td>14%</td>
</tr>
<tr>
<td>None</td>
<td>11%</td>
<td>9%</td>
</tr>
</tbody>
</table>

* n(2019) = 148, n(2023) = 92