

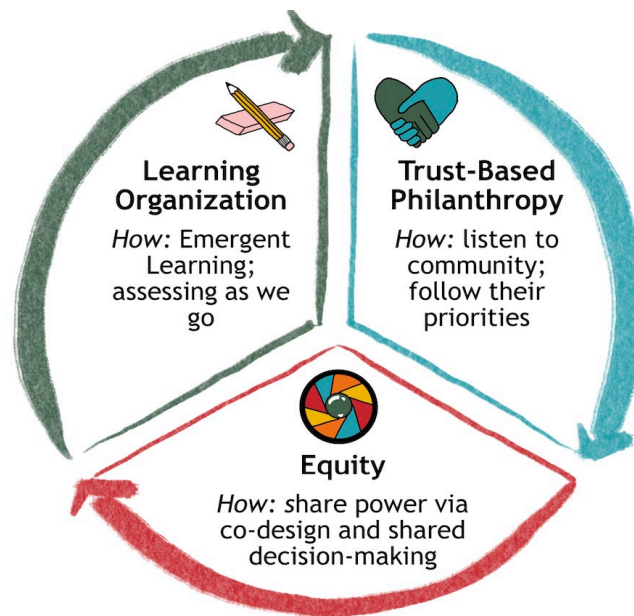


2023 Learning and Evaluation Summary Report
Elmina B. Sewall Foundation
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Introduction

This second annual learning and evaluation report focuses on progress made in 2023. In 2019, the Sewall Foundation formalized its approach to its work, informed by three frameworks (Exhibit 1) that are essential to how it works: trust-based philanthropy, becoming a learning organization through emergent learning, and an applied equity lens. Sewall views these frameworks as interconnected, mutually reinforcing, and the foundation for how it brings its values to life in its internal and external work.

Exhibit 1. Three Interconnected Frameworks Informing Sewall's Practice



In 2022, Sewall began a formal evaluation process of its approach, reflected in the collection of baseline data and experimentation with tools designed to support reflective practice and emergent learning. Sewall staff also developed a demographic data collection system that enabled it to track their grantmaking in relationship to their equity principles, conducted a satisfaction survey of their website (from which they made significant improvements), and a grantee survey on their revised and simplified application process. Early in 2023, Sewall completed and released its first summary Learning and Evaluation Report.

Key Milestones in 2023

This year, staff focused on taking all of the conceptual work that had been done, operationalizing it, and adjusting staff roles and responsibilities to meet the moment. The following are some of the foremost accomplishments named by staff.

Internal operations:

- Between late 2022 and early 2023, the Operations and Culture Pod conducted a Staffing Assessment. Through the staffing assessment process, staff also addressed issues of information flows, decision-making, and internal operations more broadly.
- Consultant Nico Chin supported implementation of tools and practices to operationalize staff roles and purpose and to explore how power operates in the organization.
- An electronic payment and grant notification system was implemented.
- Based on last year’s user survey, staff updated the website October 2023, with emphasis on improving the experience of grantees, who are the primary users.
- Board and staff collaborated on education on Trust-Based Philanthropy, Equity, and Emergent Learning.

Strategic direction:

- An organizational Theory of Change was drafted; board reached consensus on key components.
- Following the adoption of an overarching policy document for all investments and a revision of the Investment Policy Statement (IPS) in 2022, a Foundation-Managed Investments Policy was developed and adopted in 2023.

Grant making:

- Operating grants (59% of all grants) outweighed program grants (29%), representing a 10% increase in operating grants since 2017. Over two-thirds (69%) of grants were multi-year. The vast majority (86%) of grants (n=233) were approved, a significant improvement compared to a 51% approval rate in 2017.
- Sewall’s Rapid Response Fund shifted from funding only during specific grant rounds to rolling review, resulting in decreased declination rates and improved turnaround.

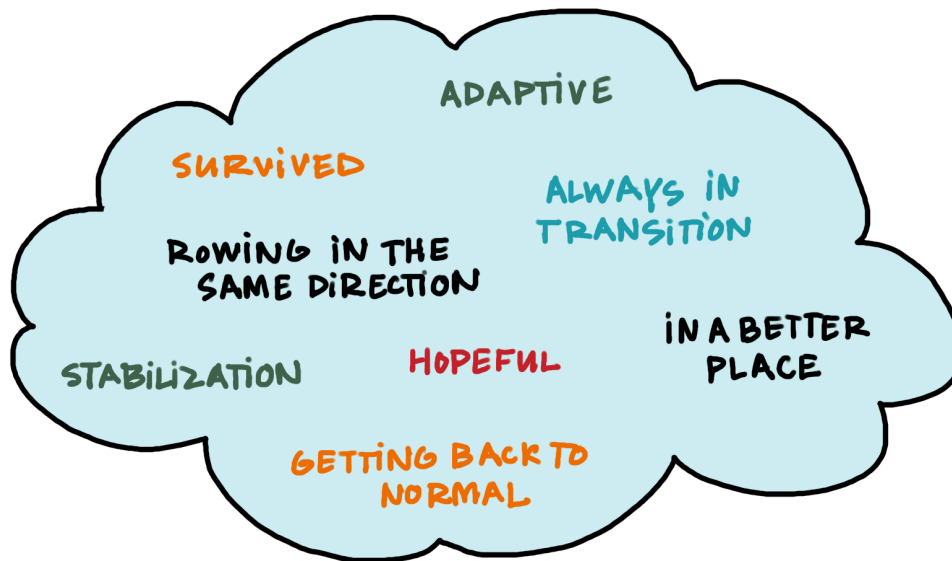
Data Sources

The table below delineates sources of data used for this year’s report. Note that some data, such as surveys, will not be collected every year. Board members’ perspective is captured in the Board of Director (BOD) post-meeting feedback forms; and a separate Board self-assessment was completed in 2023. Demographic data (which includes board, staff, and applicant data) will be reported in Sewall’s Annual Report.

Data Source	2022	2023
Website satisfaction survey	x	
Application process satisfaction survey	x	
Demographic data	x	Will appear in annual report
Staff interviews	x	x
BOD meeting BAR/AARs	x	x
BOD Meeting Surveys		x
Focus and program area self- assessments	x	x
2023 Grant Report Presentation		x
2023 Grants Report		x

BAR/AAR 2023 E-News		x
Staffing Assessment Overview		x
Sewall Foundation – Staffing Assessment Summary Report - 2023		x

Findings



When staff were asked to describe what they were most proud of in 2023, most of their comments trended in a positive direction. One staff summarized the year this way: *“We were adaptive, took challenges as learning opportunities, developed a way of understanding the Sewall approach with adaptability and learning at the core.”*

Staff recalled that 2022 was quite difficult due to the rapid pace of change and the impact of COVID-19. 2023 was a year to regroup and take all that had been conceptualized, make practical sense of it, and put it into practice.

This report begins with staff insights into learning about the Sewall Approach, followed by a summary of internal activities aimed at building the infrastructure and relationships to support the concepts underpinning the approach. The report then synthesizes staff’s learning around its programs and concludes with learning related to the board and a look ahead at the coming year.

A. Progress and learning around the Sewall Approach

A prominent theme from staff interviews was an increased sense of common language, clarity, practice, and purpose, reinforced by a year-long effort to educate themselves and the board on

the three pillars of Sewall’s approach to philanthropy: Trust-based Philanthropy, Equity, and Emergent Learning (toward becoming a learning organization).

Trust-based Philanthropy (TBP)

In 2023, TBP practices became more proficient and internalized. For some staff, TBP shows up in everything Sewall does; for others, TBP is viewed as better understood but not yet consistently practiced across staff. A trust-based approach expresses itself in a variety of ways, from internal operations and structure to external relationships and activities. Newer staff were introduced to TBP as part of their orientation, and they observe that they appreciate the concept and how it intersects with racial justice.

Staff described how TBP has begun to express itself in new or more fully integrated ways:

- *Grantmaking:* Sewall’s goal this year was to reduce the hoops applicants must jump through to get funded, especially for smaller grants. In 2022, staff reduced the number of narrative questions on applications from 12 to 3. In 2023, grant applications only had a few narrative questions and applicants were encouraged to copy and paste from application responses developed for other funders when possible. Staff shared that their intention is to only ask questions that seek information needed to make sound and values-aligned grant-making decisions.
- *Building trusting relationships:* Staff are committed to a higher touch, lower barrier process with grantees in every phase of the funder-grantee relationship. Once a grantee partner is funded, Sewall asks for very little in formal reporting, as they trust that Sewall’s resources will be used in service of the grantee partners’ mission and seek to have more ongoing communication rather than one-time reporting interactions. Sewall revised its grant agreement to no longer require a signed copy be returned to the foundation. Staff listen to the needs of the organizations and communities they serve.
- Staff report that their grantee partners are noticing the positive changes and particularly appreciate *non-funding tools* such as how accessible staff are, convenings and capacity-building support as well as *funding strategies* such as multi-year grants and providing unrestricted general operating grants. Partners also notice that Sewall's expectations and priorities have become clearer over time.
- *Community engagement:* the work supported by Sewall in Lewiston and Auburn has enabled the community to identify its own priorities, to make some decisions about funding allocation, and to start building collaborative structures to sustain community-driven activities. This long-term process, supported with operating grants (many of which are now multi-year), professional facilitation, and resourcing for development of collaborative infrastructure, has been invested in by Sewall since 2019,

“Your funding... has allowed our Digital Skills teaching collaboration with Adult Education to be impactful. In 13 months, we have held 838 classes in 14 libraries with 233 students. Having this many repeat students illustrates the need and the quality of instruction. The state, through Maine Connectivity Authority, has seen our work and now invested in our model. They even designed a grant program after it, hoping to improve the rest of the state. This all began with Sewall’s early investment.”

(Unprompted feedback from a grantee partner)

is also an expression of trust (letting the process unfold without expectation of immediately tangible impacts).

- *Values-aligned investing*: staff reported that values-aligned investing intersects with TBP and Sewall's equity principles when Sewall invests in opportunities based on values-alignment and informed trust in the investee rather than on an expected monetary return on investment. While there is more to do, great progress has been made this year.

Equity

Sewall is deepening its understanding of equity, which staff view as front and center in their work. Every staff member shared examples of how equity shows up in the work, indicating that not only is the concept understood, but that theory has been translated into practice.

- The *pod structure*, combined with a commitment to distributed leadership, has put almost every staff member in a leadership position.
- Staff praised the board's Equity Committee for leading deep work to infuse more equity-focused discussion and clarity about what Sewall's *commitment to equity* and the equity principles mean in practice.
- A big lesson this year was recognizing that some work needs to be embedded outside the organization vs. carried out by staff. *EcologyShifts* began as a Sewall-facilitated process but will be transferring to an indigenous-led organization with direct expertise in its curriculum in 2024. A learning report on *EcologyShifts* will be prepared in 2024.
- Increasing *funding to BIPOC-led organizations* indicates that Sewall is moving to action. Demographic data collection, while not used in grant decisions, enables Sewall to monitor its progress and be aware of how its resources are being invested.
- Sewall has done a good job *being intentional* in program design, data collection, transparency, setting priorities, and being aware of context (e.g., Supreme Court rulings) that affect how it communicates inclusion.

Two equity-centered accomplishments:

-Sewall is one of the few funders supporting infrastructure for civic participation. Connecting with more movement-oriented groups has strengthened ties between grassroots and mainstream organizations. There has been more convening around democracy, civic engagement, and racial justice, and strategic grants are helping to preserve local, independent media.

-Sewall deepened its investment in Wabanaki-led organizations and tribal governments (from 325K in 2019 to 1.5M in 2023). Sewall is hiring a Wabanaki partner who will be fully dedicated to this work. Ultimately, Sewall intends to integrate Wabanaki perspectives across all of its work.

Learning Organization

Some staff readily described what a learning organization is, while others were less able to articulate what the concept means. The most frequently mentioned features connoting a learning organization were structures and opportunities to reflect upon what has been learned and using data and information to refine practices and programs.

All staff, nonetheless, pointed to various activities associated with learning that they are proud of, such as the external evaluation work they are involved in, development of the organizational Theory of Change, the emergent learning tools they are using such as BARs/AARs, and asking powerful and framing questions. Less clear to them is how all these pieces come together and reinforce each other to arrive at being a learning organization.

A 2008 article in the Harvard Business School journal describes learning organizations as those whose employees are skilled at creating, acquiring, and transferring knowledge and defines three key **building blocks** (text box). The data from this year points to all of these building blocks coming into place at Sewall.

Building Blocks of a Learning Organization

Supportive learning environment: psychological safety, appreciation of differences, openness to new ideas, time for reflection

Concrete learning processes and practices

Leadership that reinforces learning

Garvin, D., Edmonson, A, and Gino, F. (2008). *Is yours a learning organization?* Harvard Business Review, March 2008 (<https://hbr.org/2008/03/is-yours-a-learning-organization>)

Supportive learning environment: Creating an atmosphere that supports people trusting each other enough to ask questions, disagree respectfully with each other, and take risks on sharing new ideas has been a work in progress. With the help of a consultant, staff better appreciate each other's differences and are learning to approach each other with more compassion, working to better clarify staff roles and structure, strengthen staff culture and collaboration, improve internal decision-making processes, and engage with conflict in a productive and positive manner. These efforts will help staff feel a deepened sense of belonging and support.

Concrete learning processes and practices: Learning happens at several levels: assessment of internal processes and relationships; rapid-cycle learning in program areas; and resourcing external research and evaluation.

Internal learning: This year saw several improvements and enhancements to Sewall's internal learning system. Focus area self-assessments, which were previously conducted individually, are now integrated into Program Pod discussions so that staff can share what they are learning and learn from their peers. Use of powerful and framing questions is becoming a routine part of meeting agenda planning. With clearer pod leadership and roles, Sewall is positioned to be more systematic about its learning processes.

Rapid-cycle learning: Sewall's staff consults with its learning and evaluation consultant to provide ad hoc, rapid cycle evaluation to assess progress in and provide feedback to inform program improvement.

External research and evaluation: Foundation-driven external evaluations are not the norm at Sewall; rather, Sewall provides resources to funding partners to do white papers, research, and evaluation to impact policy. Partners then determine the data and research they need, find the right researcher or evaluator to meet their needs, and then

build their own capacities to move it to the appropriate action step. For example, Sewall supported Teach ME Outside to conduct the Community Based Environmental Learning Census 2022 ([CBEL](#)). Several policy initiatives have come out of this around teacher professional development, the climate education bill, and other state-funded programs that draw on the findings of the CBEL to address barriers elevated in the report.

Leadership that reinforces learning: All staff see Sewall’s leadership as committed to a culture of learning, as evidenced by spearheading many of the activities mentioned above. Newer staff report that they were told that learning is front and center at Sewall.

What more needs to be done to make learning part of everyday work at Sewall?

Staff put forward the following recommendations for making learning part of everyday work at Sewall.

- *Slow the pace* of the work and make time for reflection, for experimentation and exploring new ideas, to review community practices, values, equity principles, and integrating relevant tools into staff time and meetings.
- *Program and Learning and Evaluation pods* need to work more closely together to systematize learning.
- The *organizational* and *program-level theories of change* will help staff to see the line of sight from the vantage point or issue they are addressing, to the strategies they are using, toward the goals they hope to achieve, thereby identifying opportunities for learning and adaptation and aligning this to the organizational Theory of Change.
- Continuing to assess and improve on *internal communications*, particularly sharing information, decisions, and learning between pods, will support Sewall's commitment to be a learning organization.
- If staff continually works to *translate values and principles into action* and periodically reflects on the impact of those actions, learning can become a continuous cycle. Having two new staff members coming on in 2024 presents an opportunity to prioritize these core concepts and practices. Reminders of these frameworks could be built into document templates, and visual reminders could be placed in the office to remind staff to hold themselves and others accountable to them.
- “Lessons learned” could be part of a periodic check-in at staff meetings.

B. Building Relationships and Infrastructure

Sewall conducted a range of activities to build the foundation for an infrastructure that supports equity, trust-based philanthropy, and learning: a Theory of Change, a staffing assessment, enhancements to grantmaking, and values-aligned investing.

Theory of Change

Sewall’s organizational Theory of Change (TOC), a visual representation of Sewall’s mission, vision, values, beliefs, strategies, and long-term impacts, will be supported by program-level theories of change (in progress). At the start of 2023, Sewall did not have a Theory of Change. A

year later, deep conversation among staff and board, and insights gleaned from last year's learning and evaluation report (including grantee feedback), have resulted in consensus on its key components. Now, Sewall is working on making explicit how the components relate to each other. When approved, the TOC will hone and clarify how Sewall communicates its identity and approach, and it will be used as an accountability tool that will help frame learning and evaluative questions going forward. The final visual aims to be easily distilled, expressing the essence of the organization.

While staff seems clear as to what the TOC conveys, they acknowledge that Sewall is not uniformly understood by external partners. Its emphasis on *how* they do the work and less on *what* they fund can be confusing as it is a less common approach in philanthropy. Next steps will include further vetting with the board, then bringing it to all grantees in May 2024 for their feedback.

Staffing assessment and plan

Conducted during the winter of 2022-23 and led by the Operations and Culture Pod, each staff engaged in a confidential conversation about what capacity Sewall needs in place to fulfill its mission, respond to community priorities, and more completely bring Sewall's tools and strategies to the work. The following excerpt summarizes the findings:

“Staff love working here and appreciate so much including the great work of the foundation and its partners, the flexibility in their work schedule, encouragement to balance work and life, the autonomy and trust to perform, the independence to respond to opportunities and evolve their role, great salary and benefits, etc. Staff feel we are doing important internal work and supporting amazing external work that leads to change.

That said, it's clear that the same celebrated autonomy – coupled with some siloing, job description and role confusion, interpersonal challenges, uncertainty on the flattened structure, constant change, overwhelming pace, and the isolation from the pandemic – have created some structural issues.” (Staffing Assessment Summary Report – 2023)

The interviews conducted for this report suggest that people held a positive view of the process, appreciating that everyone's voice was heard, that confidentiality was respected, and that the process took an emergent learning approach by tweaking it along the way to respond to what is needed.

The Ops and Culture Pod took the findings to heart and responded with the following actions: 1) role restructuring that helped align roles and facilitate professional growth; 2) decision to hire community partners for Wabanaki and Animal Welfare/Legacy focus areas, which will allow existing staff to more deeply focus on their primary bodies of work and consider how those program areas are evolving; 3) engagement with Nico Chin, consultant, in implementing practical solutions to role clarification ([MOCHA](#)) and purpose, outcomes, and process (POP). Staff observed that with help from Nico, they are actively using these tools, incorporating them into everyday practice.

Grantmaking changes

Over the last five years, Sewall has sought to simplify its grants administration process to make it more efficient, to enable the system to gather only the most important, relevant data, and to reduce the burden on grantees. These efforts align with Sewall's equity aims and with trust-based philanthropy principles. For example:

- There are fewer hoops for grantees to jump through: financial reporting is not required (except in grants with Expenditure Responsibility¹), increased number of operating grants, and more choice for grantee reporting formats (e.g., narrative, alternative format such as conversations or convenings, or accepting reports that grantee partners write for other funders). These changes underscore that Sewall trusts that grantee partners are using the funds to advance their mission, and in that way, to advance Sewall's mission.
- Staff led a complex effort to transfer all grantees to electronic payment, with the goal of reducing the wait time for grant decision and funding.
- Many staff offered Rapid Response Grants as something they were most proud of this year. A total of \$250K went out in 2023 to Maine organizations for emergency funding. After COVID, these grants were redesigned from three grant rounds a year to a rolling grants process facilitated by staff, which has helped Sewall reach its intended goal of getting money out the door within two weeks of receiving an application. The application has no narrative questions and asks only for necessary data. Grants are generally small (generally up to \$10,000) but very flexible (can go to roof repairs, flood mitigation, etc.). Peer funders have reached out about how to replicate this model.
- Increased multi-year grants have freed up staff time to do more community-related work, cultivate relationships with organizations and funders, and participate in committees and other community-serving efforts. One outcome of increased community engagement has been improved relationships with grantee partners. One staff said that as a result of coaching leaders who feel isolated, who are contending with sexism and racism, they better understand the complexity of their work. One staff said that their time this year was more to the benefit of grantee organizations and enabled them to be more present in communities. Deeper conversations with community leaders are also generating ideas for addressing endemic issues.
- Sewall piloted its first "extraordinary grant" this year, intended to respond to significant and transformative opportunities or challenges in a manner beyond what is possible in the existing grants budget. Staff plan to develop a proposed process and criteria for extraordinary grant opportunities in 2024. A pilot extraordinary grant enabled the nonprofit National Trust for Local News to work with local partners to purchase Masthead Maine, preserving independent news and the important role it plays in inclusive, democratic society.
- The pace of change over the past few years has been deeply felt by staff, especially operations staff: the number of grants Sewall has made has doubled since 2019; database migration occurred in 2021-22, followed by website redesign and transfer to an

¹ When a private foundation makes a grant to an organization that is not classified by the IRS as tax-exempt, it is required by law to ensure that the funds are spent for charitable purposes and not for private or political activities. (Council of Foundations)

electronic payment system. Some staff called for slowing down and focusing on a few things at a time.

Impact investing

This tool enables organizations, businesses, and projects who cannot obtain traditional financing for a project or business to receive investment funding from Sewall. A major accomplishment in 2022 was the adoption of an overarching policy document for all of Sewall's investments by the board, followed by the Foundation-managed Investments Policy in 2023. This enabled Sewall to do more Maine-based impact investing in 2023.

As of year-end 2023, Foundation-managed Maine-based investments totaled about \$3.7 million. Investments made during 2023 included a \$1 million convertible note investment in Atlantic Sea Farms; a \$250K bridge loan to The Ecology School to buy a farmhouse; and \$750,000 to support acquisition of Fork Food Lab's new facility. Sewall has set a goal of investing a minimum of \$18 million in Maine by 2028, with impact investments that have a primary goal of advancing Sewall's mission. The board and staff are successfully using agreed-upon criteria to assess each investment. It will be important for Sewall to keep a holistic values-based assessment of opportunities and an understanding of risk viewed through an equity lens, considering overall social impact rather than being tied to every investment having to meet all investment criteria.

C. Program-level and Focus Area Learning

This year, staff redesigned an emergent learning tool developed in 2021, the individual focus area self-assessment, to a group conversation to encourage cross-pollination and learning throughout the year. Their conversations are summarized in notes taken during Program Pod conversations. Reviewing these notes helped to identify overarching themes: increasing support for finding ways to connect groups around advocacy; increased participation from youth (as well as a need for even more attention to youth engagement); and identification of opportunities to address unmet needs. Economic development and workforce issues remain significant areas of focus in Katahdin, Washington County, Wabanaki communities, and Lewiston-Auburn. Increased collaboration between white and indigenous communities in the Katahdin Region and Washington County and collaborative efforts in Lewiston-Auburn hold promise for addressing structural and systemic barriers to a healthy, equitable, and sustainable economy. To meet the challenge of a rapidly changing climate from an equity perspective, staff would like to become more explicit about Sewall's understanding of and approach to climate justice.

Program Pod members began an intentional dialogue this year around the interconnectedness between humans, animals, and the environment and how it manifests in their work. Interconnectedness appears to be most visible in Food Systems, Wabanaki Communities and Tribal Governments, Katahdin Region and Washington County, with evidence that communities recognize the connections and/or that this interconnectedness is part of their culture and

worldview. This is an area for further learning and exploration in 2024 among staff and board members.

D. Board Learning

In 2023, Sewall held jointly planned educational efforts to bring TBP, Emergent Learning, and Equity to life, staff and board are developing a shared understanding of equity and using similar language to describe Sewall's values and beliefs.

Staff were invited to participate in the 2023 board assessment for the first time, contributing to the ongoing alignment across the organization. As a result, staff feels more recognized, respected, and trusted. Board and staff had difficult conversations about power dynamics, a practice that can deepen trust and build competence in engaging with conflict in a productive and respectful manner, and which contribute to better working relationships across the organization.

Through interactive, staff-led sessions on the development of the theory of change as well as 1:1's conducted by Gabriela with each board member to obtain feedback, the board and staff reached consensus on the theory of change core components.

Board meeting feedback surveys provided positive assessments of interactive sessions, substantive agendas, and an appreciation for board-led activities. Small group conversations yielded rich, useful feedback. Meeting participants especially appreciated the panel from Lewiston in June and would like to see more grantee partner panels in the future, aligning with staff desire to bring more of the foundation's work into board meetings. The June meeting was praised for its cohesive agenda and successful interactive exercises. The December survey produced positive feedback on aspects of the meeting that had been critiqued in the past: good time management, straightforward and appropriate materials, and a good balance between presentation and discussion. One person liked "the energy, enthusiasm, and generosity of spirit people brought to the meeting." One lesson learned this year was a reminder to ask framing questions after presentations so that the board knows what kind of feedback staff needs and supports the board in its governance role.

Overall, staff goals for the year were achieved, inclusive of the approval of the 2024 budget. In 2024, more education and discussions will be focused on a values-aligned idea of impact, expanding from a more traditional project- and outcomes-based framework to a framework that focuses on the impact of how the foundation operates and relates to the people and organizations it supports in creating conditions that increase grantee partners' impact in communities/sectors. A tension in the understanding of impact is evident and expected as the foundation continues its shift from more traditional philanthropic approaches to more trust-based and community-driven approaches, explicitly focused on power shifting.

E. Looking to 2024

Staff was asked to describe their hopes for the year, what they are excited about and what they are concerned about for 2024. The table below lays out some of these ideas.

Issue	Outlook for 2024
Learning	Program Pod will play a more active role in organizational learning, with Program and Learning and Evaluation pods working in mutually supporting ways. Staff hope that the next phase in theory of change development, revisiting strategic learning questions, tools, and data points, will make the connections between TBP, equity, and learning more explicit for the board and external partners.
Equity	Develop a shared understanding of equity via a retreat with the Equity and Governance Committees that will put equity principles into practice; finish the theory of change and bring it to life.
The Grantee Convening	The intent of this gathering is to bring together all of Sewall's grantees partners to build relationships, to share the theory of change, and to better understand the interconnections in our collective work and ecosystems. What is learned that day will help inform the next multiyear grants budget and program area directions.
Influencing philanthropy	Sewall will work closely with Maine Philanthropy Center to remain active in funder affinity groups and support a new L-A funders group to increase funder collaboration and coordination. Share more of our work with funders across the country, especially the lesson that doing work in a relational, trust-based and community-driven way is harder, requires more time, recognizes that change is not linear. This way of working is culture changing.
Grantmaking	Maintain the changes made to date, adding some larger grants for deeper impact. The structure has been built for long-term grants; approve a multi-year budget to support this goal. Continue to support grassroots, community-led efforts, including those that might have a harder time getting funding from traditional philanthropy. Explore participatory grantmaking scenarios (see additional insights below).
Values-aligned investing	By the end of 2024, increase level of proactive investment offerings that grantee partners identify. Deepen and broaden staff understanding of how to identify appropriate investment opportunities.
Capacity building and other support for grantee partners	Need to better understand and codify supports provided and tools used and consider what level of consistency across programs is most beneficial, while supporting flexibility. Staff is conducting a capacity-building assessment in 2024.

As Sewall makes significant shifts in its grantmaking, new questions have emerged for consideration in 2024:

- What are the benefits and downsides of funding many small grants in a large ecosystem vs. fewer grants in larger amounts (in some cases to promote collaborative work)? In deeply interconnected systems, winding down one grantee affects the whole system.

Staff recommended that more community input is needed on what small grants mean to grantees and what would make the system work best.

- What is the right balance between encouraging collaboration and community self-determination? Some efforts this year were directed toward engendering increased collaboration (e.g., Wabanaki, L-A) among organizations, but staff recognize the fine line between encouraging collaboration and setting an expectation that they must collaborate while balancing Sewall's deep commitment to respecting community self-determination.
- Should Sewall continue to fund large, well-funded organizations? Should Sewall fund organizations based on stage of development? There are arguments for both (e.g., long-term funding for backbone organizations and those doing good work, and funding for grassroots orgs, often BIPOC-led and very rural-led). One respondent thought the program level TOCs would be helpful in creating some parameters based on community guidance.
- As Sewall considers participatory grantmaking as a next step in democratizing decision making, how can this be done without overburdening organizations and with a realistic sense of Sewall's internal capacity?

Discussion

This year has seen great strides in bringing a common language and increased practice around Sewall's core concepts and values. There is abundant evidence of learning, especially about equity and trust-based philanthropy, resulting in more alignment among staff and board around Sewall's mission and how to advance it over the next 5-10 years. The main theme coming out of this year's staff interviews was the intensive effort to build the infrastructure that supports the *practice* of TBP and equity.

While there is more work to do, significant and positive changes have been made to Sewall's grantmaking and how the foundation relates to communities. Grantees are appreciative of these efforts, as indicated by verbal and unsolicited feedback. The convening in May 2024 for all grantees will be an opportunity to glean rich information to inform Sewall's strategy and resource allocation.

By all accounts, the internal staffing assessment was incredibly effective. Based on the assessment findings, leadership is being distributed through the pod structure in ways that uplift and recognizes staff talents and expertise and make people feel engaged, especially operations staff. People describe having a stronger sense of purpose, clarity, and satisfaction in their roles. Bringing on new staff will enable current staff to focus on what they are most passionate about, and people seem to be working better across focus areas, merging areas and strategies to accomplish common goals. A central commitment in 2023 is to put the organization and its mission first and advance it through collective practice.

The organizational TOC is still a work in progress, but as people take more time with it, it is hoped that they will better understand that the long-term impacts are not about programmatic targets; rather, they are about values, interconnection, and equity at the system and community level. A good resource is *A Trust-based Framework for Learning and Evaluation in Philanthropy*, in the journal *Foundation Review*:

(<https://scholarworks.gvsu.edu/cgi/viewcontent.cgi?article=1663&context=tfr>).

Drawing from the information gathered this year, we propose the following recommendations to enhance learning in 2024:

- Gather more systematic feedback from grantee partners. This report depended heavily on the viewpoint of staff. Once the strategic questions for the next year are determined and the TOC is approved, a grantee survey is suggested. This will require thoughtfulness around not burdening grantee partners with information requests (as Sewall has been making significant progress in streamlining grant processes to diminish resource-impact on grantee partners), while also wanting to be informed and guided by grantee partners' perspectives and insights.
- Staff raised a few important questions, and pointed out that the best framing questions are those that relate to the mission. Staff should work together with the learning and evaluation consultant to make those questions as powerful as possible. For example, to assess the types of organizations Sewall should fund, and understanding that Sewall's mission can only be met when its grantee partners' missions are met, a good question might be: "What is the optimal combination of types of organization to fund that would help advance Sewall's mission? How do grassroots organizations benefit from the grants they receive? What is a "right-sized grant" for a small organization to realize its goals?"
- We should work together to better describe Sewall's approach to becoming a learning organization.
- Continue the good work of developing program-level theories of change.
- Continue to build time for reflective practice.