



IDEX

International Development Exchange

MARCH 2016 IDEX ACADEMY EVALUATION REPORT

I. About the March 2016 IDEX Academy

The IDEX Academy is a week-long, high impact training course that connects young and mid-career professionals, philanthropists, and like-minded individuals to world class thought leaders and practitioners from the field, leading grassroots and movement leaders, community organizers, artists, ecologists, academics, and progressive philanthropists to chart a new pathway for the social sector.

The third IDEX Academy took place from March 6—10, 2016, at the Westerbeke Ranch in Sonoma, California. The program was a great success. The 2016 Academy convened 16 participants, 11 faculty, and 11 additional mentors representing 6 different countries and 32 different domestic and international organizations. **Over 80% of the faculty are people of color and people from the Global South.** 100% of the faculty are practitioners as well as experts in their other roles – academics, artists, organizers, social justice and philanthropic leaders.

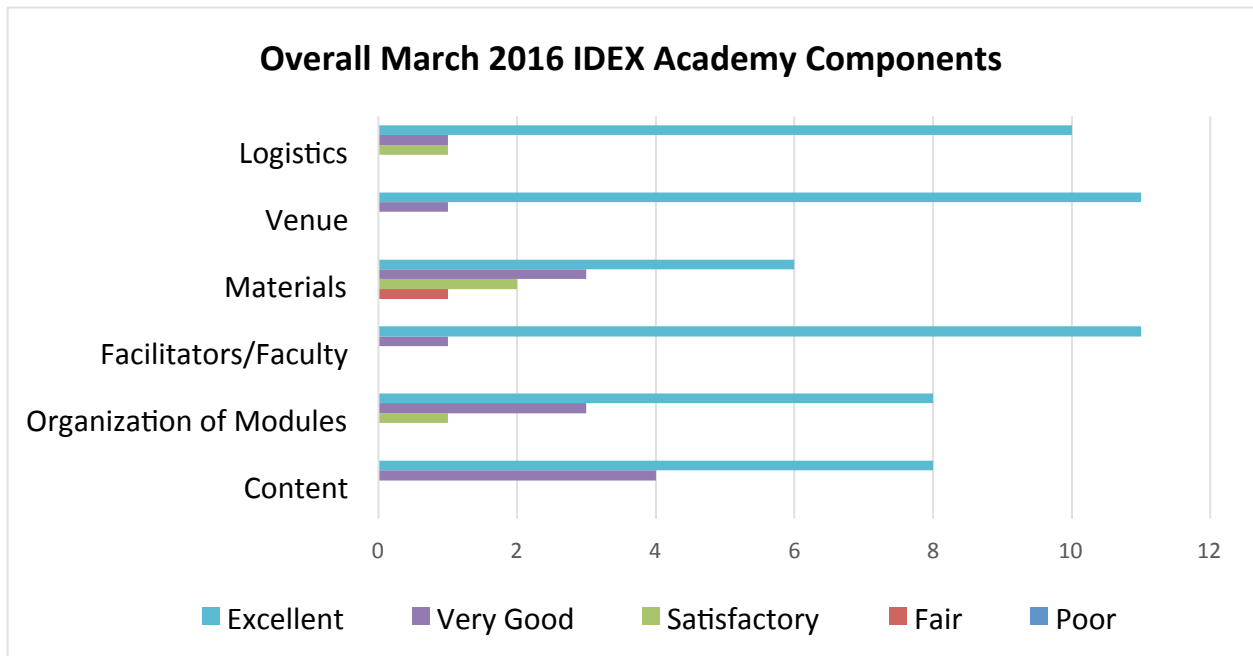
We received a total of 25 applications, out of which we selected a final cohort of 16. The 16 *Impact Influencers*, or Academy graduates, engaged in a rich, learning-oriented, self-reflective, and participatory set of activities that unfolded during the week. They also had the opportunity to be in inquiry with other influencers in the sector, such as grassroots leaders, community organizers, academics, heads of major foundations, and young, millennial trustees.

The IDEX Theory of Change (<http://www.idex.org/TOC/>) formed the basis of the March 2016 Academy curriculum. The format of the March 2016 Academy curriculum included a combination of discussions, group activities, creative exercises involving art and performance, nature walks, presentations, individual projects, physical movement, and team building exercises. After an inspiring and enriching week, participants are able to leave IDEX Academy with the following:

- A better understanding of the trajectory of philanthropy and the social sector;
- The ability to conduct deep self-inquiry and examination around their own cultural assumptions;
- Knowledge of how to situate themselves in their own wisdom and recognize traditional knowledge systems as a source of power, resilience, resistance, and transformation;
- Knowledge of how to work in authentic partnership with community-based organizations;
- The ability to practice relationships in giving with a social justice framework;
- The motivation and access to form networks of learning, support, and solidarity with peers and sector-leader mentors.

II. Results of the March 2016 IDEX Academy

IDEX administered hard copies of pre and post Academy surveys to the 16 participants to evaluate the key objectives and activities of the program. Because 4 participants were affiliated with IDEX in some capacity (either as staff, Board, consultants, or members of the IDEX Young Professionals Group), we did not include their evaluations in order to avoid any conflict of interest. As of 10 March 2016, the 12 participants not affiliated with IDEX had completed the pre-Academy and post-Academy final surveys. The results of the aggregated information can be found below.



Overall, participants rated their experience at the Spring 2016 Academy very highly. All the survey respondents felt that the content, faculty, and venue were either excellent or very good

In the words of the participants:

“So well done.”

“Everything moved smoothly. The location is beautiful. Food is excellent. Faculty were well prepared and focused on [the] task at hand. Facilitators were cognizant of keeping us moving through all the modules.”

“Everything was excellent and went above and beyond my expectations.”

“The process is surprising, but powerful and effective. Don’t change it!”

1. 92% of survey respondents rated program logistics as excellent or very good.

"The care and love that went into all the planning...was ever present."

"(I) didn't know how to prepare for this retreat. Don't now that it would be better to explain it beforehand, but just noting (it) was so different from how I imagined it."

2. 100% of survey respondents rated the venue as very good or excellent.

"Setting reflected purpose beautifully."

"Westerbeke was a fantastic location—a little more sun would have been nice ☺"

"Would have been nice to get off the ranch for a bit to see an area I've never been to before."

3. 75% of survey respondents rated program materials as excellent or very good.

"As a big fan of context, I do like to receive materials and deeper writings about what was shared...Pre-course materials were great!"

"I couldn't easily access the links for the pre-reading materials. This may have just been my phone/computer, but consider making them available in different places? (Example dropbox links)"

4. 100% of survey respondents rated program Facilitators/Faculty as very good or excellent.

"I wouldn't have changed any of the facilitators. They all added something beautiful."

"I thought all were equally strong and I enjoyed the opportunity to learn from a different style and perspective each day."

"(I am) full of gratitude for María Estela."

"I loved the facilitators and having time to go deeply with each."

"I loved Omi/Sharon and their deep wisdom. All the other faculty were excellent—these were extra special."

"Everyone was really wonderful. Personally, I was particularly touched by Sharon and Omi."

"I really loved Matt and Pia's section.... communing with nature.... the learning about ecology was so profound and really practical, and I wanted more of that."

"I really enjoyed exercises/modules led by Sharon, Omi, Pia. I thought everyone was great and each part built upon the last very well, but those facilitators had the most impact for me."

"I would love modules by senior faculty and mentors. Or the more junior staff will need to tighten their presentations. I would reduce the first two days of class to a day and a half. I would add another half day to the fourth day. DESMI is a must keep, I would love more examples of faculty from the field, more grassroots practitioners."

"Faves:

- *Sharon – writing questions/prompts were incredible.*
- *Omi – translating feeling into movement.*
- *Matt – his mini-lecture on ecology I took a lot from.*
- *Pia – feedback circle and her reflections.*
- *Maria Estela, et. al on Day 3 – timeline, our "dream foundation" exercise.*
- *Sharon – closing circle.*
- *Wisdom Circles.*
- *Fun night!*

Not my Fave:

- *Feedback circle went too long...too intense for introverts.*
- *There were few times we were asked to touch someone or hug and it felt obligatory like it was rude to decline. When people are processing deep stuff I think there needs to be safety to not have physical contact if/until that person is ready. Forced intimacy was a trigger for me as a survivor."*

5. 92% of survey respondents rated the program organization of modules as very good or excellent.

"I felt that each person, exercise, and module was so well thought out and executed."

"I thought all (modules and exercises) were equally strong, and I enjoyed the opportunity to learn from a different style and perspective each day."

"I felt mostly complete on Day 1. Day 2 I wanted 2 more hours on ecology and Day 3 I wanted another half day."

"Loved all the topics. One that I would modify is the module on the last day around the exercise on playing (the) role of foundation/decision-makers. Would've liked to talk and learn more about (the) history of philanthropy and models of giving that the Global South practices instead of solely political economic history. Questioning whether foundation is even the model or if there are other structures – What about LLCs for example?"

"Loved flexibility of curriculum. Took breaks when needed – responded to needs of group."

"I liked having the Wisdom Circles in the evening. The day that it was incorporated into the afternoon session was tougher, as I was really needing processing time, and that didn't happen in the time before dinner."

6. 100% of survey respondents rated the program content as very good or excellent.

“Content was fantastic.”

“A bit more context/expectation setting up front.... A bit more guidance to help us determine how we will apply our learning more concretely.”

“All different content and structure than any conference I’ve attended...interruption from way of thinking in best way.”

“Intro: I guess I did want to know a little at the beginning about what brought people here, what questions they were grappling with.

Monday [Self-Determination]: I also found the embodiment of shame and joy (Omi/Sharon) and the group expression/collaboration helpful. Overall, I’d like even more ‘group’ creations and also some exploration of ourselves collectively (mapping together).”

“There weren’t any (sessions) that I didn’t enjoy. There were definitely ones that were super hard, like gazing into each others’ eyes. I think I was really impacted by the ecology module and the Relationship mapping. (It was) so thought provoking.”

“I enjoyed everything – I did find myself more tired on Wednesday’s program [Global Solidarity and Social Justice Giving] – maybe more body work that day or other ways to bring in creativity (like envisioning a magical foundation, maybe using materials, art).”

“Wished for more time on the Global Solidarity component. Especially more of a bridge between the inward gaze to the outward gaze to the implementation of what was learned.”

“I realized I wanted to learn and hear more about how we access and engage in grassroots networks and participate meaningfully in other fora.”

“I wish the brass tacks session on philanthropic practice was longer and that IDEX had shared more of its knowledge/good practices with the group. Some of what groups arrived at, example ‘we’ll host grantee trainings and convenings’ could have used some loving guidance. I think there is more room for IDEX to have a ‘point of view’ and be an expert in the space. I know we’ll get some of this from mentors. As we know, in philanthropy good intentions are abundant. The devil is in the details of how people operationalize theory and intent. Such a strong theoretical foundation here could have used more wrestling with clarifying its concrete application to achieve not only different intent but different outcomes in funding (↑racial, gender diversity, ↑\$\$ for organizing, etc.).”

“If it is possible to have 2-3 participants from the Global South I find that diversity helpful to see nuance.”

“I did not know enough about IDEX and IDEX’s unique model. I thought I was here to learn some of that. It was divulged in part only while you shared your wisdom, or in casual conversations. We learned a lot about IDEX and the world of philanthropy, and your collective wisdom. Thank you. Need clarity on what your Academy is about. Most of us came with certain expectations. We needed more of the early part of your story and your transformation.”

The goals of the IDEX Academy are:

- To train the next generation of leaders in resource mobilization and philanthropy in cultural and ecological competence, conducting self-assessment, and managing the dynamics of difference;
- To inspire a learning behavior based on reflection, dialogue, and connection and encourage *Impact Influencers* to adopt transformative practices to dismantle injustice and inequity;
- To ground learning in grassroots-led practices, pedagogies of community organizing, and participatory appraisal towards principled action;
- To change attitudes, language, skills, and knowledge to mobilize resources in favor of social justice philanthropy; and
- To build a movement of empowered and collaborative change agents, influencers, and leaders at the intersection of grassroots development and philanthropy.

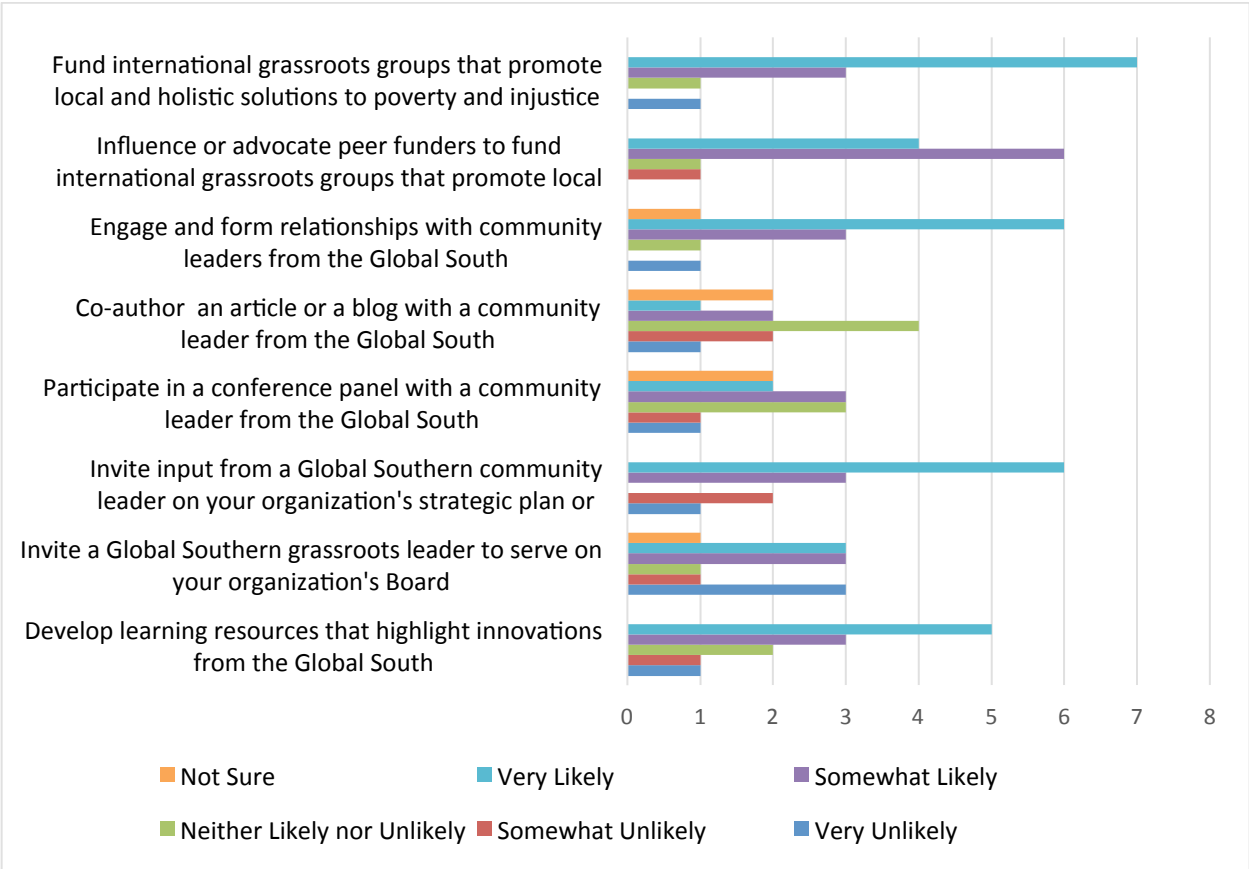
Evaluation results show that the Academy was successful in carrying out these objectives.

The following table details activities in which Academy participants, or the organizations they represent, have engaged in *prior* to attending the Academy. The chart that follows this table shows the motivation of participants to engage in those same activities *after* attending the Academy. The most notable changes occur in the likelihood of participants to develop learning resources that highlight innovations from the Global South and influence or advocate peer funders to support international grassroots groups. The evaluation also shows that participants are considering co-authoring an article or a blog with a community leader from the Global South and inviting input from a Global Southern community leader on their organization’s strategic plan or program priorities.

Activities in which individual participants, or the organizations they represent, have engaged (prior to IDEX Academy).	Survey Respondents	Percentage of Respondents
Funded international grassroots groups that promote local and holistic solutions to poverty and injustice.	6	50%
Influenced or advocated peer funders to support international grassroots groups that promote local and holistic solutions to poverty and injustice.	5	42%
Engaged in and formed relationships with community leaders from the Global South.	8	67%
Co-authored an article or a blog with a community leader from the Global South.	1	8%
Participated in a conference panel with a community leader from the Global South.	5	42%
Invited input from a Global Southern community leader on your organization’s strategic plan or program priorities.	6	50%

Invited a Global Southern grassroots leader to serve on your organization’s Board.	2	17%
Developed learning resources that highlight innovations from the Global South.	5	42%

Likelihood of participants to engage in the following activities *after* attending the IDEX Academy.



One of the participants who answered “Not Sure” to a lot of the above questions stated:

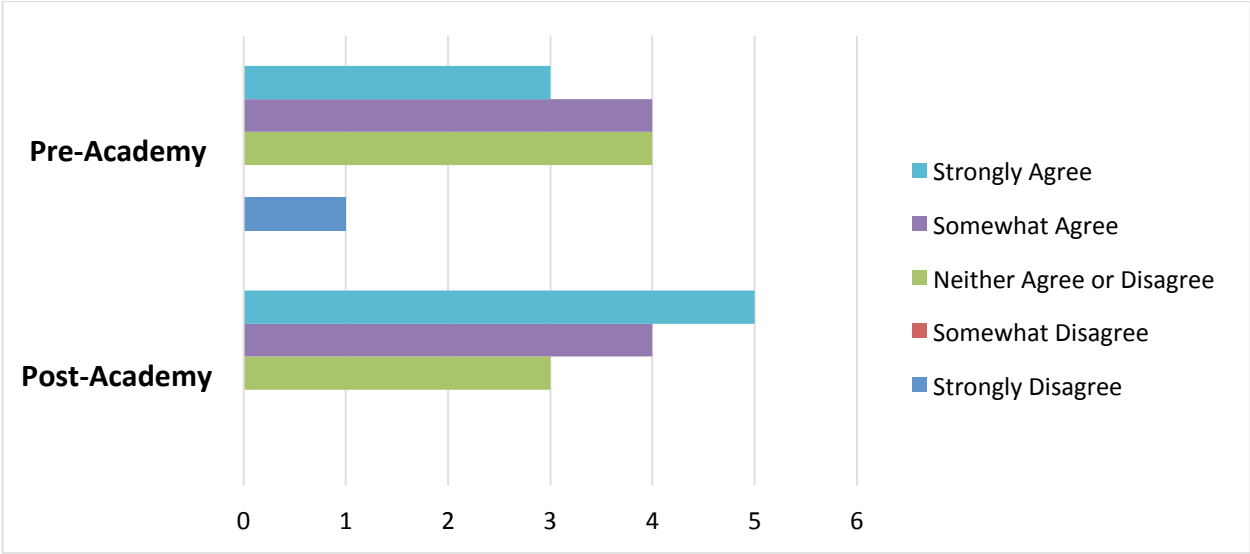
“It’s unlikely [that] someone outside the family will be invited to join the Board at this time – not up to me! But I may suggest an Advisory Committee. Not sure of some of these [questions] because while they are awesome ideas, I don’t want to be overly cavalier in working with grassroots leaders and asking for their time (may take more than 6 months to feel like I can respectfully for new relationships with clarity of purpose.”

Pre and post Academy survey results revealed that participants increased their knowledge of grassroots practices and social justice philanthropy. The charts that follow demonstrate that increase in skills and knowledge and show that the March 2016 Academy was particularly successful in the following areas:

- Increasing participants’ commitment to prioritize their own well-being and the well-being of those with whom they work.
- Raising the understanding amongst participants of what a social justice funder is and does.
- Increasing participants’ knowledge about the dynamic contexts in which global Southern grassroots groups operate.
- Raising awareness of philanthropic practices in other cultures and countries.
- Ensuring participants know how to access the networks and resources available to support grassroots-level international development work.

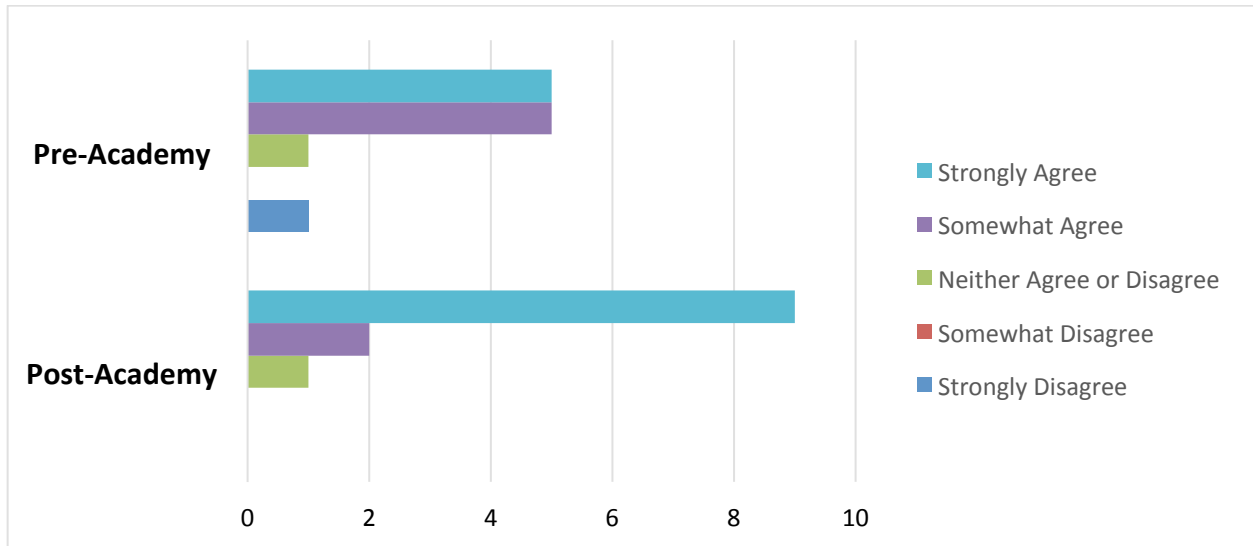
Survey Responses:

When developing new relationships, I learn about the particular conditions, settings, and political, social, and economic forces that affect the individual or organization.



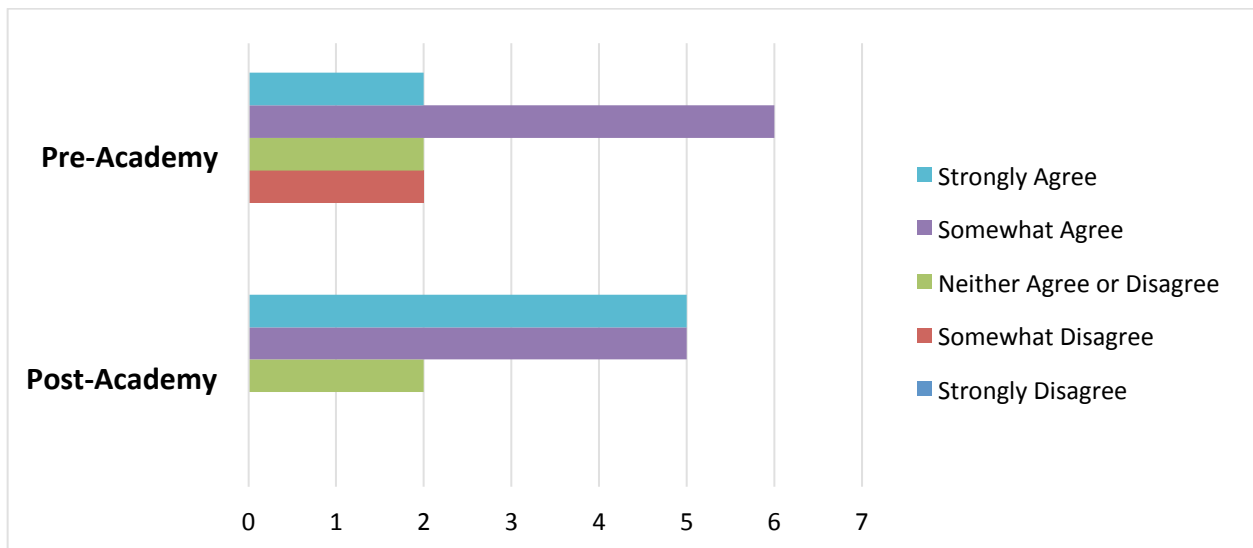
Conclusion: As a result of the IDEX Academy, participants are 10% more likely to learn about the particular conditions, settings, and political, social, and economic forces that affect an individual or organization when developing new relationships.

I understand and am comfortable building alliances with like-minded people and organizations.



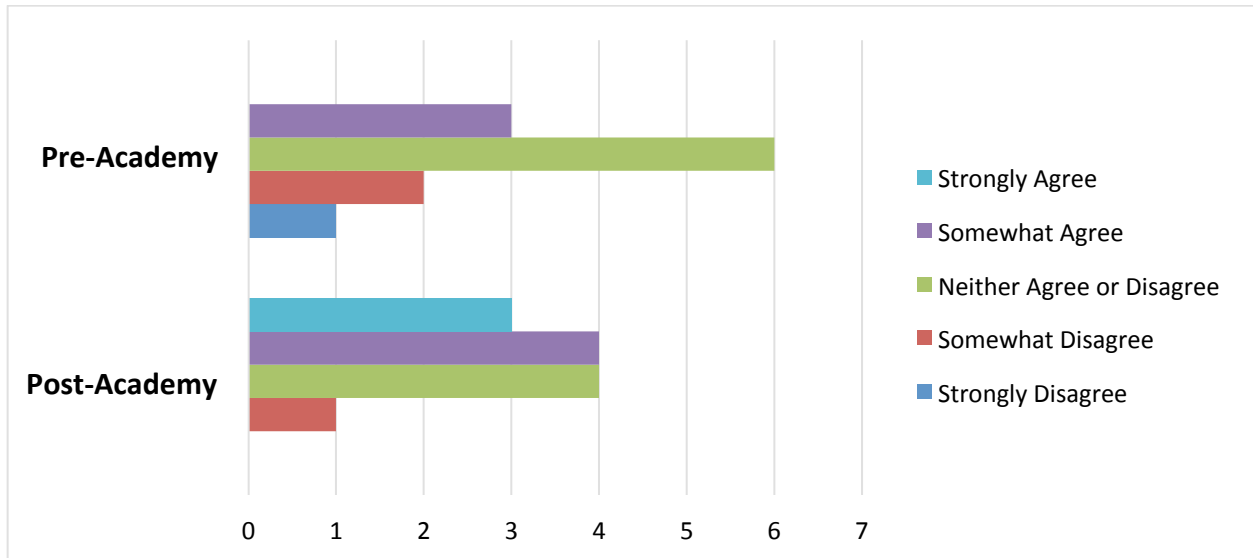
Conclusion: After the Academy, participants are 11.7% more likely to understand and feel comfortable building alliances with like-minded people and organizations.

I can identify connections between local and global issues and how they affect each other.



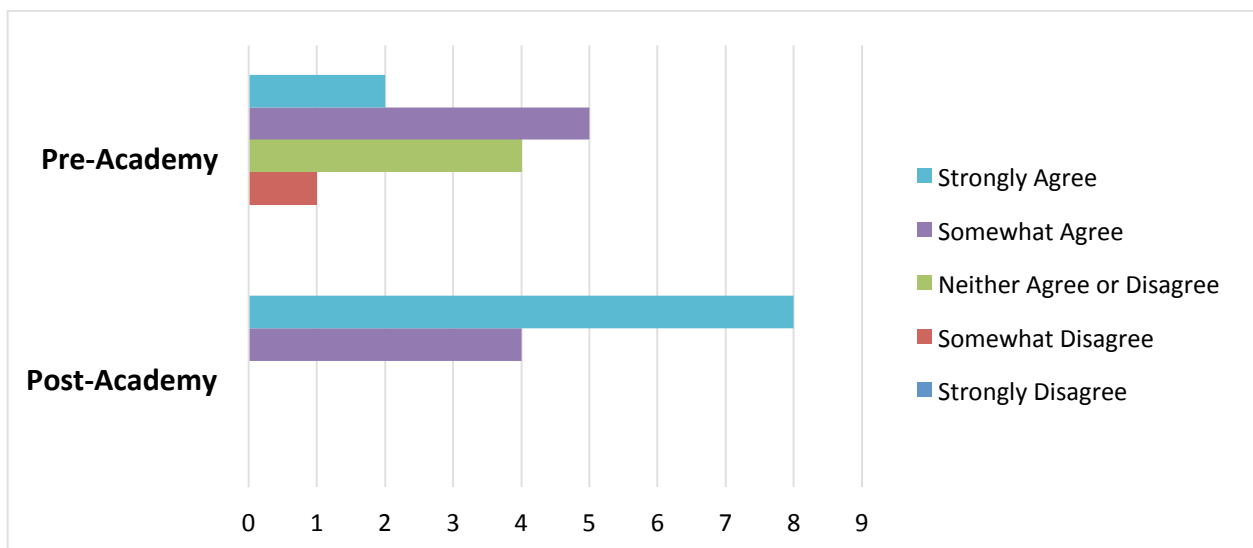
Conclusion: After the Academy, participants are 11.7% more likely to identify connections between local and global issues and how these issues affect each other.

I am knowledgeable about the dynamic contexts in which global Southern grassroots groups operate.



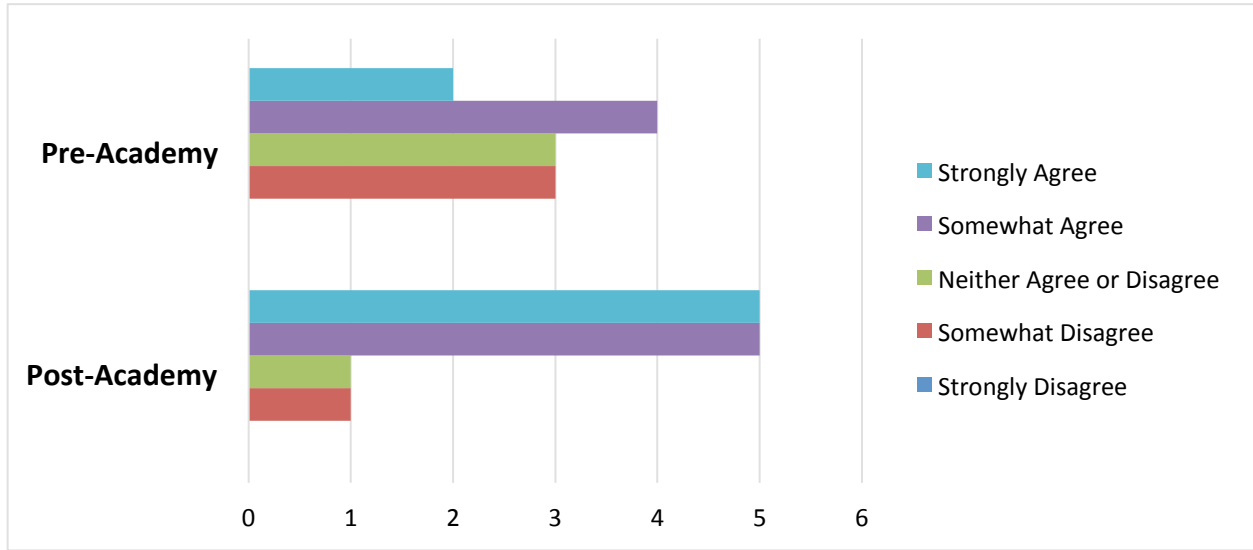
Conclusion: Following the Academy, there was a 16.7% increase in knowledge amongst participants about the dynamic contexts in which global Southern grassroots groups operate.

I am committed to prioritizing my own well-being and the well-being of those with whom I work.



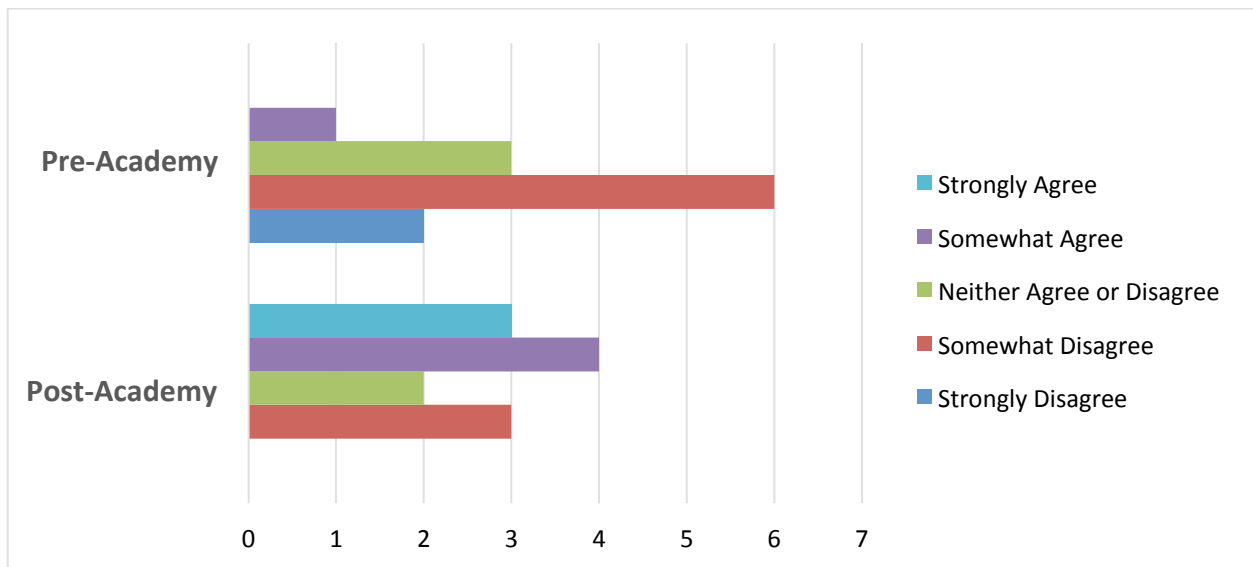
Conclusion: After the Academy, participants are 25% more likely to prioritize their own well-being and the well-being of those with whom they work.

I understand what a social justice funder is and does.



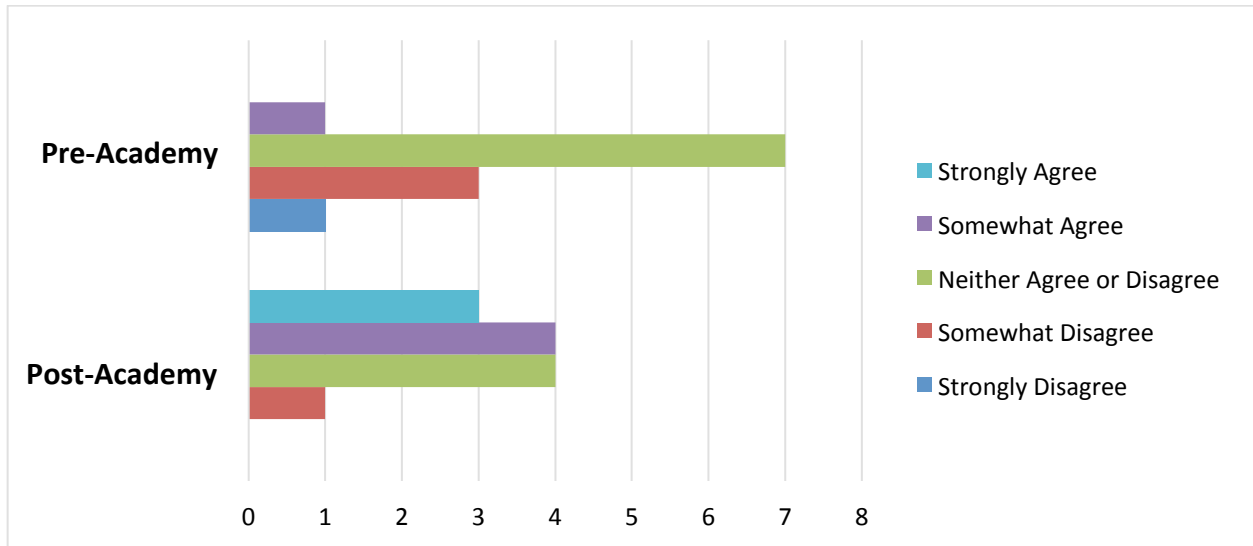
Conclusion: The Academy increased participants' understanding of what a social justice funder is and does by 15%.

I am aware of philanthropic practices in other cultures and countries.



Conclusion: Following the Academy, participants are 26.7% more aware of philanthropic practices in other cultures and countries.

I know how to access the networks and resources available to support grassroots-level international development work.



Conclusion: After the Academy, participants are 21.7% more likely to know how to access the networks and resources available to support grassroots-level international development work.

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In addition to an increase in knowledge and skills, IDEX Academy participants left the week-long program with a deep sense of gratitude for the experience. Following are some of their comments:

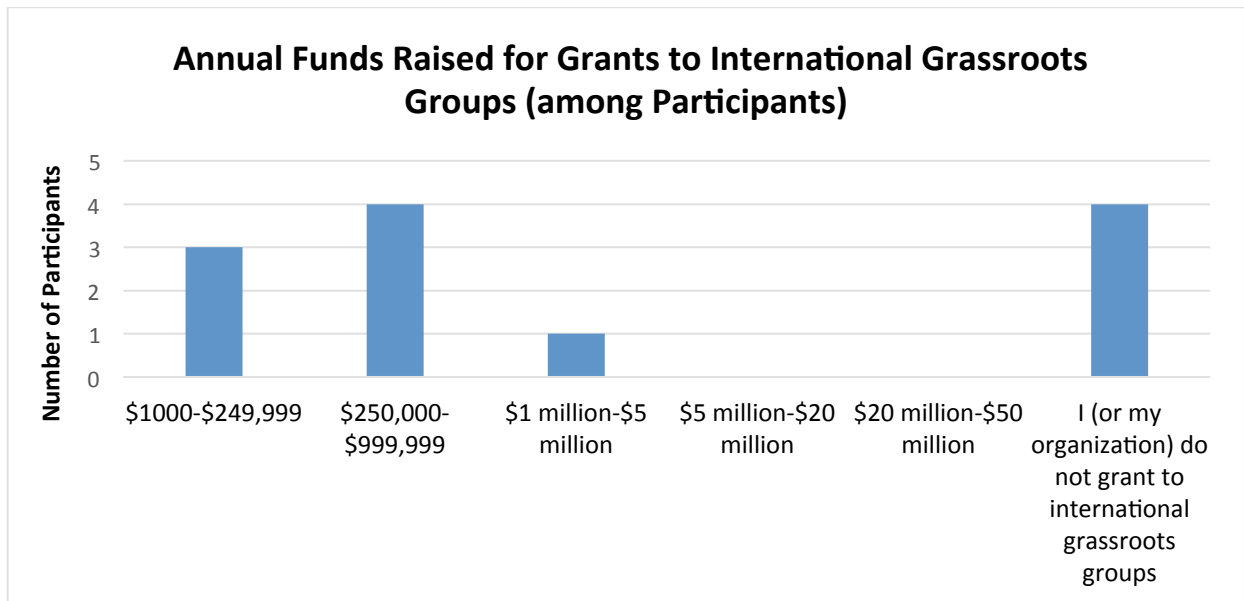
"I felt very prepared to be here and am so thankful for all the good care and intention of this gathering."

"It was an excellent, memorable experience. Thank you!"

"THANK YOU! This was a heart-filled and transformative experience! <3"

"I'm eager to spend time looking back at my writing because each module was so right and I want to recharge and continue to internalize the learnings."

One of IDEX’s core strategies for effecting systemic change globally is to channel increased financial resources to international grassroots groups that are implementing local solutions to the multi-faceted problems they are facing. This IDEX Academy offered the opportunity to influence those with access to financial resources. The graph below demonstrates the annual amounts that individual participants, or the organizations they represent, currently grant to international grassroots groups.



IDEX Academy participants and the organizations they represent collectively fund an average of approximately \$3,875,000 philanthropic dollars annually. Also important to note is that 4 of the 12 survey respondents do not grant to international grassroots groups. This is particularly significant because the post-Academy survey revealed that 83.3% of 2016 IDEX Academy *Impact Influencers* are likely or somewhat likely to channel additional philanthropic dollars to international grassroots groups, and 83.3% of participants are likely or somewhat likely to influence or advocate peer funders to fund international grassroots groups.

III. Conclusions and Lessons Learned

IDEX is committed to excellence and learning and uses every opportunity possible to improve its services and partnerships. This third IDEX Academy brought out a new set of lessons that IDEX will consider for future programs. Following are some key learnings from the third IDEX Academy:

Faculty

In evaluations from previous Academies, participants had articulated the need for smaller, consistent set of faculty. The third IDEX Academy confirmed that a small core group of faculty and facilitators encourages the deepest learning by allowing participants to engage fully with all faculty members. IDEX's Artists in Residence, Sharon Bridgforth and Dr. Omi Jones were mentioned by over half of the participants in the post-Academy Evaluation. One participant said, *"Sharon and Omi were essential in setting the right tone, and amazing additions to the Academy."* This feedback confirms IDEX's belief that artists and cultural work are essential to the work of social transformation.

Mentors

This year, IDEX experimented with a new model of mentorship. In previous Academies faculty/staff were asked to double up as mentors as well. However, this put an extra strain on the faculty. In addition, IDEX wanted to ensure that the Academy's *Impact Influencers* were paired with experienced philanthropic leaders and practitioners. In order for the experience to be as enriching as possible, mentors participated in a specially designed orientation call and a separate session led by Pia Infante at the Academy itself on deep listening, purposeful coaching, and reflective mentoring. Mentors have not yet been formally evaluated but initial anecdotes reveal great appreciation for this dedicated training and orientation.

Organization of modules

Feedback from previous Academies indicated that participants wished for more flexibility and spaciousness in the daily schedules. IDEX took this feedback into account in the March 2016 Academy, and participants responded positively. One said, *"I really liked the later start times and open windows to either hang out and make connections or to have personal time."*

Due to limited availability of the Westerbeke Ranch, the third IDEX Academy was one day shorter than previous Academies. As opposed to scheduling one module per day, the fourth day of the Academy incorporated two complete modules – Global Solidarity and Social Justice Giving. Feedback from the participants indicated that this did not leave enough time to process and digest the information. One participant said, *"I could have used more space the (last) day to land on what is possible. I felt like we wrapped up and moved on to closing a bit fast."* Another echoed this sentiment saying, *"I would have liked more time on Wednesday to focus more on how we might incorporate what we're taking away from this into our work. It felt rushed at the end."* Moving forward, the Academy will return to one module per day and add back in the fourth day.

Sharing IDEX Wisdom

Several participants in the March 2016 IDEX Academy felt that more of IDEX's ideology, practice, approach, and wisdom could have been incorporated into the materials and content. One participant said it would be useful to, *"...share more in the pre-readings about the ideology of IDEX, the political/historical context of how IDEX fits into philanthropy today."* Another said: *"Include a couple of case studies from IDEX's work in the Global South."* Still another participants stated: *"I would have liked more of an introduction of IDEX's work. The program seemed to assume a level of familiarity with your organization that I did not have."* IDEX's wisdom and practical experience are assets that participants felt could have been more thoughtfully integrated during the Academy. *"I think there is more room for IDEX to have a "point of view" and be an expert in the space,"* said an Academy graduate. In future Academies, IDEX's mandate and challenge are to share its wisdom and practice with intention, grace, and humility.