



IDEX

International Development Exchange

MARCH 2015 IDEX ACADEMY EVALUATION REPORT

I. About the March 2015 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, academics, and progressive philanthropists to chart a new pathway for the social sector.

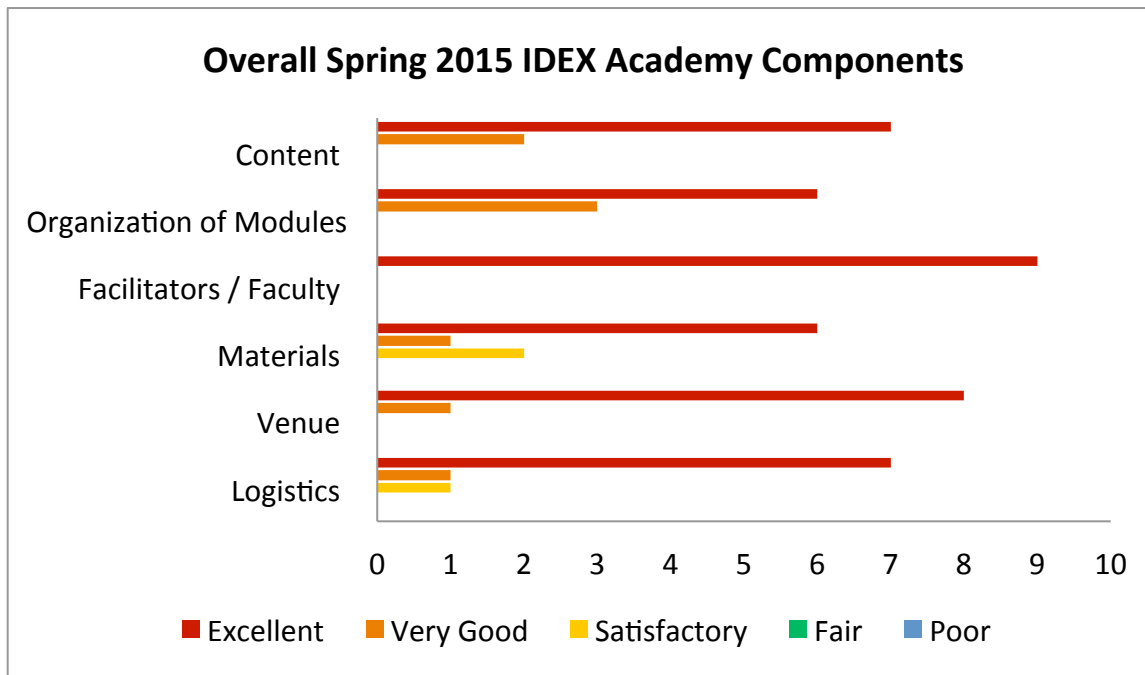
The second IDEX Academy took place from March 25 – 30th, 2015, in Santa Barbara, California. The program was a great success. The 2015 Academy convened 28 participants, faculty and mentors representing six different countries and 22 domestic and international social change organizations and universities. Over half the faculty and mentors had Global Southern backgrounds. We received a total of 26 applications, out of which we selected a final cohort of 13. The 13 *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 got a chance 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 Spring 2015 Academy curriculum. The format of the Spring 2015 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 2015 IDEX Academy

IDEX administered electronic pre and post Academy surveys to the 13 participants to evaluate the key objectives and activities of the program. As of 17 April 2015, 9 participants had completed the pre-Academy survey and 9 participants had completed the post-Academy final survey. The results of the aggregated information can be found below.



Overall, participants rated their experience at the Spring 2015 Academy very highly. All the survey respondents felt that the content, organization of modules, faculty, and venue were either excellent or very good.

“I have had a very positive experience overall...in so many ways the experience was life changing.”

1. 100% of survey respondents rated program **content** as excellent or very good.

“A tremendously well-done IDEX Academy – the content was thoughtfully given and the facilitators and faculty were top notch. The venue was sublime – really such an ideal place for close community and even putting an ecological approach in place. Such appreciation and gratitude for the IDEX team in really organizing such a great experience for us!”

“... so many great and difficult topics were brought to the forefront during the program in a very comfortable, and open manner.”

2. 100% of survey respondents rated the **organization of program modules** as very good or excellent.

“Each of the sessions was designed with such thought and facilitated with such care that I felt held and supported through a process of deep transformation that only just started at the Academy and will continue for years to come. I am still glowing from the profound wisdom shared and the beautiful relationships formed.”

“The wisdom circle (among influencers only) was incredibly valuable in my opinion. I suspect our very deep discussion on the state of global institutions bored many of the Influencers there, but both Mutombo and Paul’s experiences and opinions within that realm were extremely valuable and enlightening.”

“I’d love to see more ritual in the closing of sessions, especially the Wisdom Circle and any others that close the day. Perhaps a short meditation or grounding exercise would really bring closure with the feeling of connection to each other. I’d also love to see more play and other ice breaker games towards the beginning.”

3. 100% of survey respondents rated program **facilitators / faculty** as excellent.

“I rated the faculty highly because of their clear priority to ‘facilitate’ rather than ‘teach’. I also loved the fact the faculty and influencer ratio was so even.”

“The Faculty was excellent, but Pia I felt was very especially open and honest.”

“I particularly enjoyed: Matt’s session on Ecological Resilience and Tracking (a new and refreshing way to understand relationships, movements, and ways of working with a broader understanding), Pia’s session on principles of social justice giving/trust-based relational investing (really got to the root of what trust building means, honest feedback and a dedication to practicing those values in philanthropic work), and the concept of the wisdom circles as facilitated by Mutombo and Paul (the way they modeled shared leadership while inviting the Impact Influencers to ask questions, contribute, and engage with faculty was beautiful). The fact that threaded through the conference was stories (IDEX case studies with partners and donors, lessons from the Gandhian movement), which were helpful for my own learning.”

“Starting with Sharon’s personal story session was so deep and useful. Done in a small circle, it immediately set a tone of safety, trust, and connection among the group. Her own delicate and personal approach to facilitating was key in that session. Matt’s session was energizing, fun, and very meaningful . . .Solome’s session was also very deep. It has me thinking a lot about how we tell stories, what images we use, and what narrative we are changing or perpetuating through our media content. I’m thinking more about how we can offer webinars, blogs, and other pieces to help educate our community about the dangers of “single stories.” The gentle way in which she facilitated the session was also so important – it would be too easy for someone to lead that session from a place of judgment and anger. I learned just as much from her grace

and from her unspoken words . . . Pia's personal story and how she tied that into her session of personal affirmations and friendly feedback was a game changer. I felt so much closer to all of the Influencers after that session – especially those with whom I hadn't had much contact previously. Pia's presence and wisdom are extraordinary. I hope she can continue to facilitate future Academies. I look forward to continuing to learn from her in the future. Finally, I was so touched by Paul's, Shashiji's, and Mutombo's personal stories and wisdom. Such a gift to even be in their presence.”

“All the facilitators and teachers were great. It would have been nice to have had one consistent facilitator. More one on one with other participants and faculty would have been nice too.”

4. 78% of survey respondents rated program **materials** as very good or excellent.
5. 100% of survey respondents rated the program **venue** as very good or excellent.

“I thought the Academy was fantastic. The logistics were extremely well coordinated, and the venue was well suited to the activities, comfortable, and relaxing. All of the faculty members were fantastic. I really appreciated the choice that IDEX made to make the program residential. This allowed me to build deeper connections and learn more about the faculty as full people. And the content was excellent – it really challenged my assumptions and habits.”

6. 89% of survey respondents rated the program **logistics** as very good or excellent.

The goals of the IDEX Academy are:

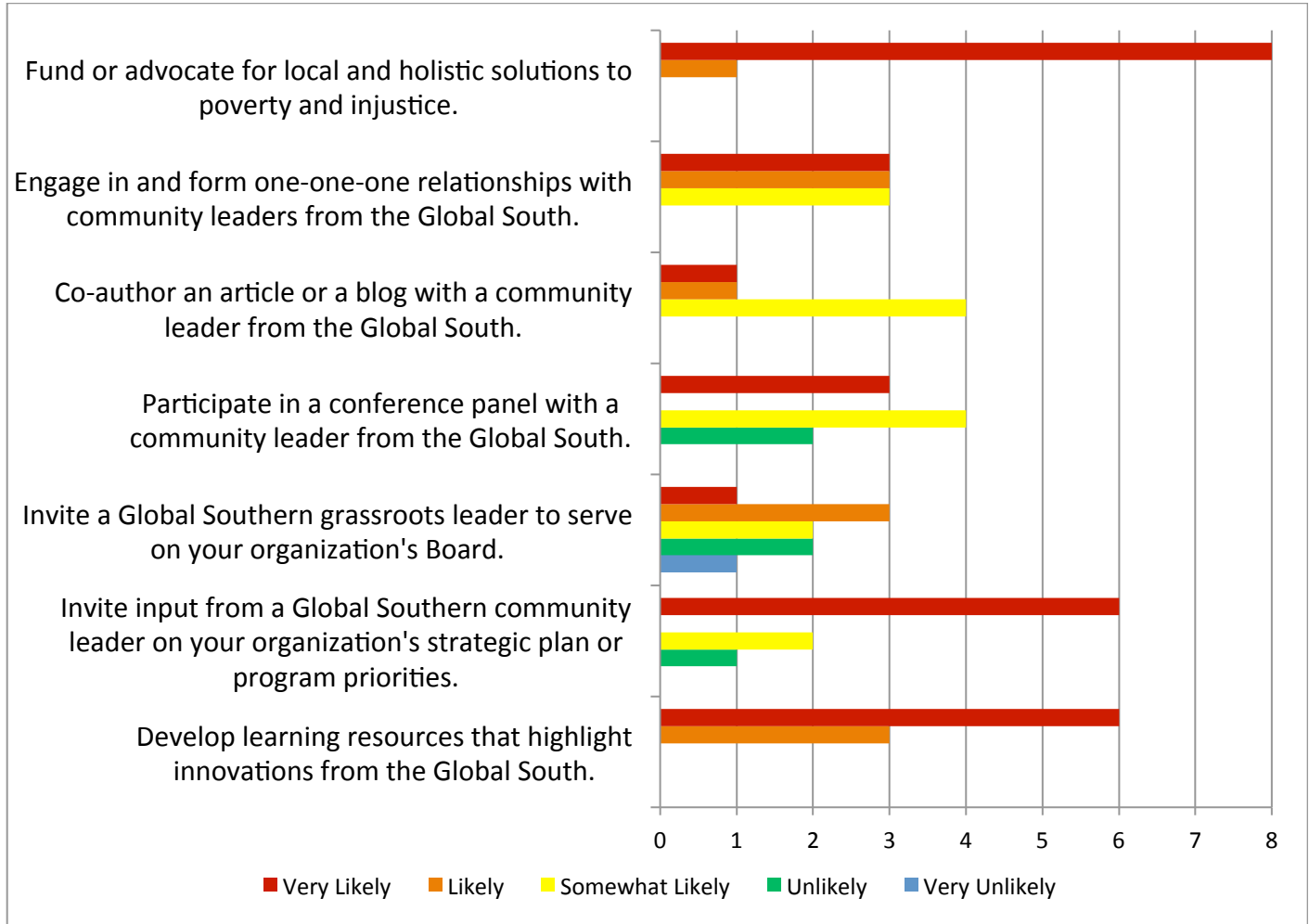
- **To train** the next generation of leaders in resource mobilization and philanthropy in cultural and ecological competence, conducting self-assessment and managing the dynamics of difference;
- **To inspire** a learning behavior based on reflection, dialogue and connection and encourage Impact Influencers 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 invite input from a Global Southern community leader on their organization’s strategic plan or program priorities. 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 a Global Southern grassroots leader to serve on their organization’s Board.

Activities in which individual participants, or the organizations they represent, have engaged (prior to IDEX Academy).	Survey Respondents	Percentage of Respondents
Funded or advocated for local and holistic solutions to poverty and injustice.	9	100%
Engaged in and formed one-on-one relationships with community leaders from the Global South.	7	77.8%
Co-authored an article or a blog with a community leader from the Global South.	0	0%
Participated in a conference panel with a community leader from the Global South.	4	44.4%
Invited a Global Southern grassroots leader to serve on your organization’s Board.	1	11.1%
Invited input from a Global Southern community leader on your organization’s strategic plan or program priorities.	3	33.3%
Developed learning resources that highlight innovations from the Global South.	0	0%

Participants' likelihood to engage in the following activities *after* attending the IDEX Academy.

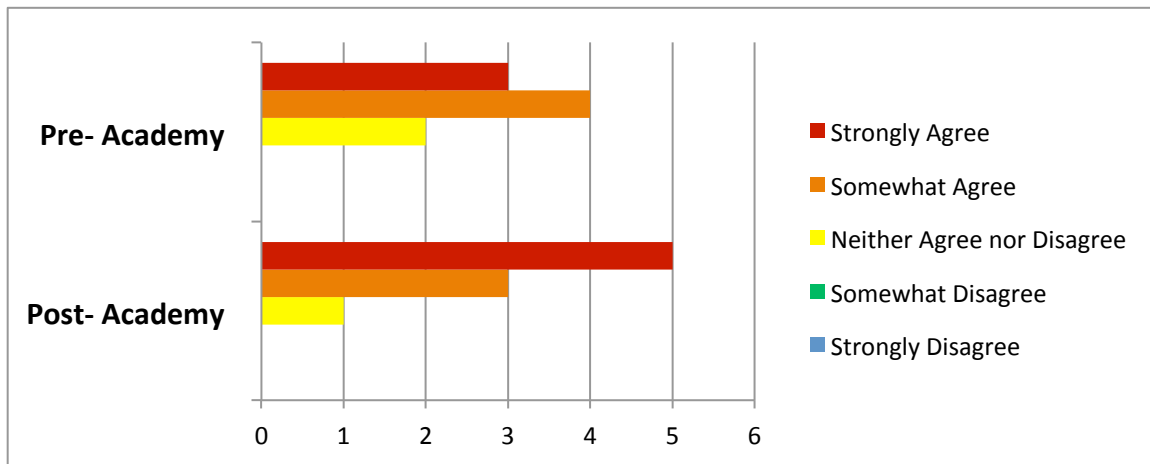


Pre and post Academy survey results revealed that participants increased their knowledge of grassroots practices and social justice philanthropy. The charts that follow demonstrate that increase in skills and knowledge and show that the March 2015 Academy was particularly successful in the following areas:

- Helping participants understand the importance of learning about the particular conditions, settings and political, social and economic forces that affect the individual or organization when developing new relationships.
- Improving participants' ability to identify connections between local and global issues and how they affect each other.
- 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.

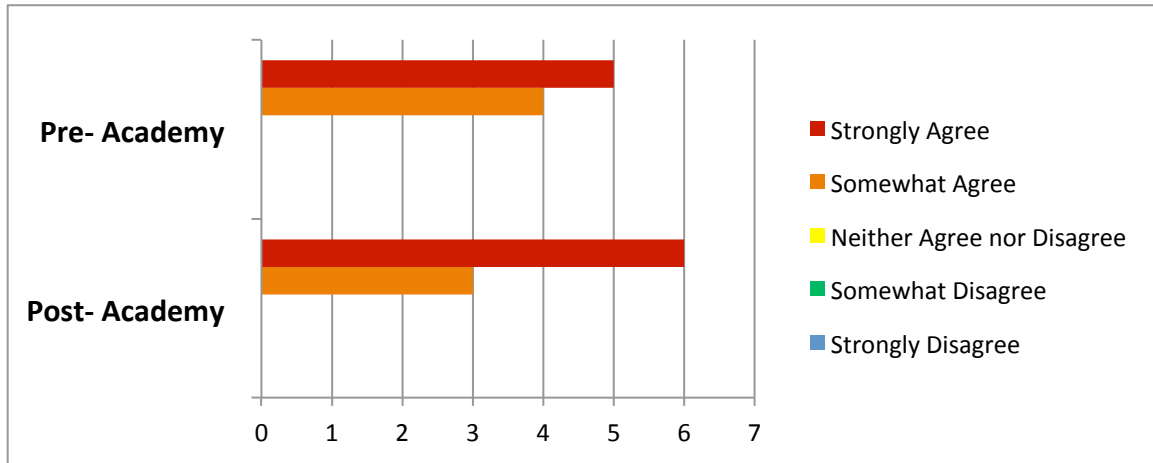
Survey Responses:

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



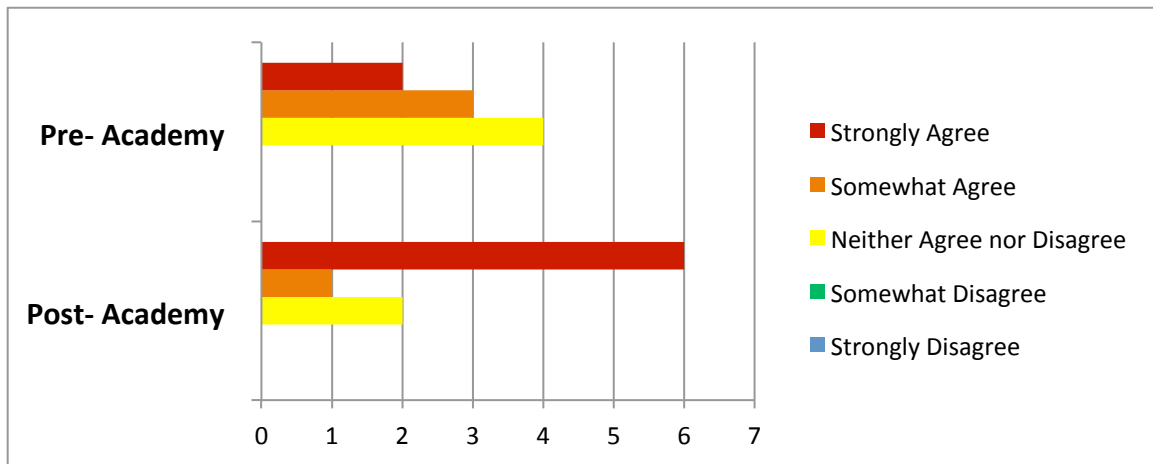
Conclusion: As a result of the IDEX Academy there was an 11.1% increase in participants who will learn about the particular conditions, settings, and political, social, and economic forces that affect an individual or organization when developing new relationships.

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



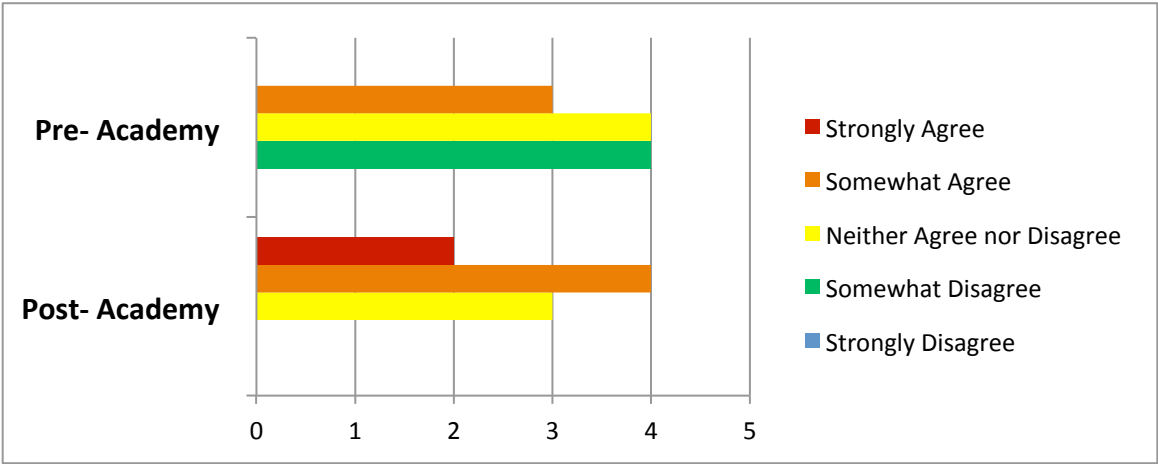
Conclusion: After the Academy, 11.1% of participants felt a greater understanding and comfort building alliances with like-minded people and organizations.

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



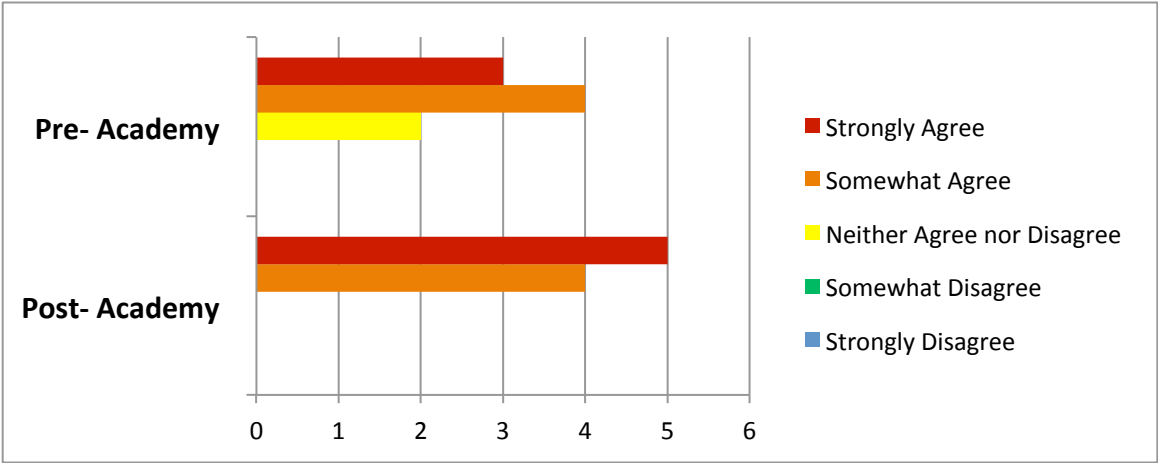
Conclusion: The IDEX Academy helped 77.7% of participants increase their ability to identify connections between local and global issues and how these issues affect each other.

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



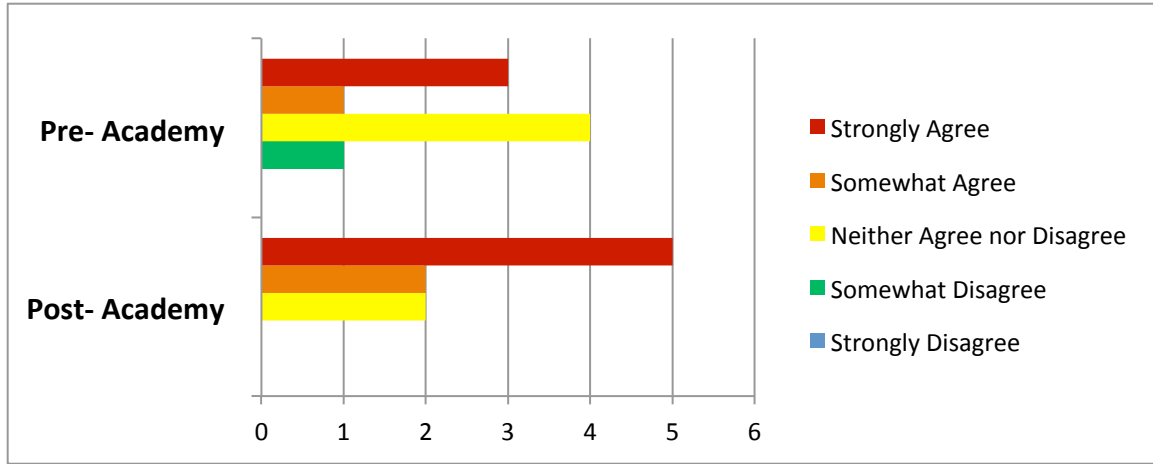
Conclusion: Following the Academy, 44.4% of participants felt more knowledgeable about the dynamic contexts in which global Southern grassroots groups operate.

I prioritize my own well-being and the well-being of those with whom I work.



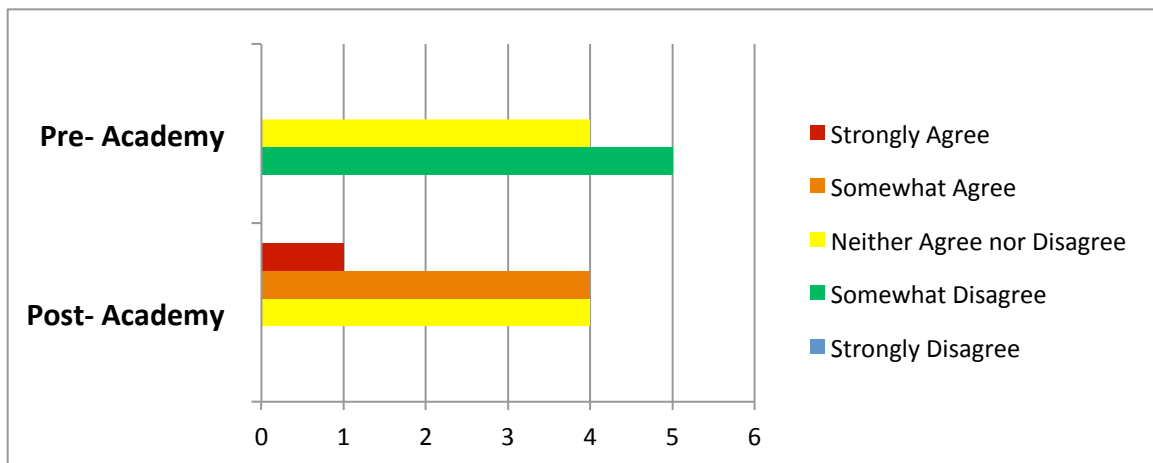
Conclusion: After the Academy, 22.2% of participants felt that they would prioritize their own well-being and the well-being of those with whom they work.

I understand what a social justice funder is and does.



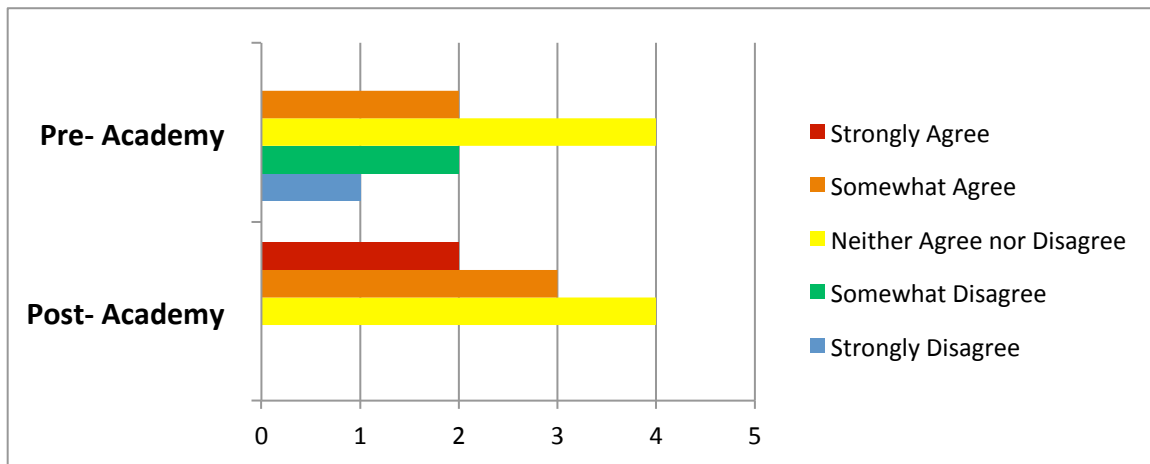
Conclusion: The Academy provided 44.4% of participants with a better understanding of what a social justice funder is and does.

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



Conclusion: Following the Academy, 55.5% of participants had a higher awareness 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 33.3% more participants knew 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 new motivation, ideas and a better understanding of themselves and their worldviews. But don't take it from us. Here is what the participants had to say about the Academy in their own words:

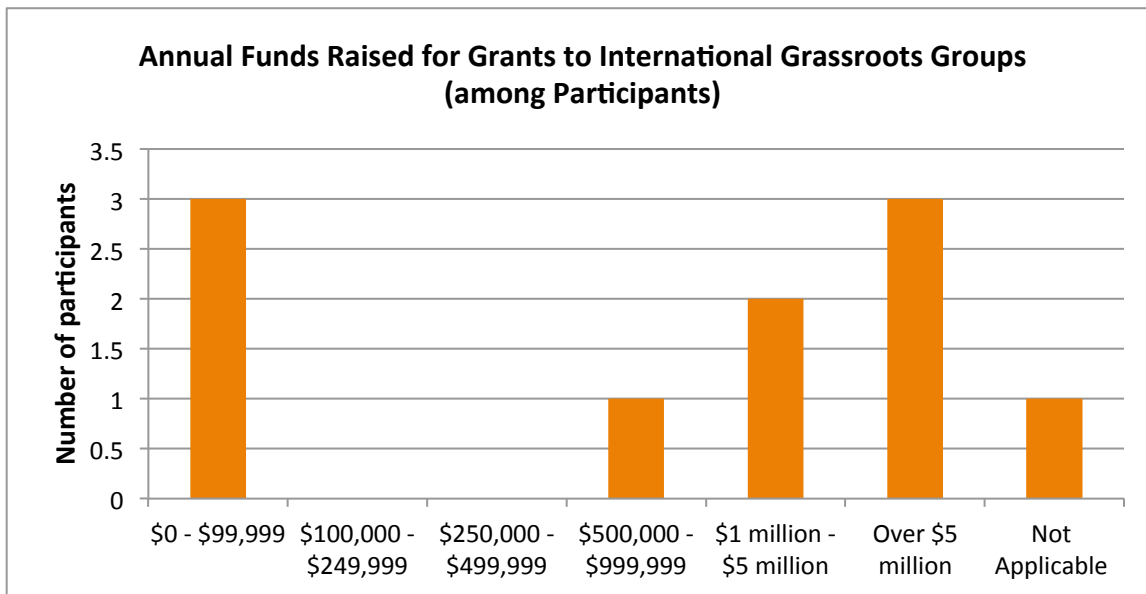
“How can I explain in words the benefit of this incredible event? I am so grateful to be included in this year's cohort of Influencers. This is exactly what I needed at this exact moment in my evolution as a social changemaker. In fact, without this, I fear that I was running at a speed that was neither healthy nor sustainable. The Academy is catalyzing a major shift towards a more mindful and ethical practice of social change that is so deeply needed in the world. Each of the sessions was designed with such thought and facilitated with such care that I felt held and supported through a process of deep transformation that only just started at the Academy and will continue for years to come. I am still glowing from the profound wisdom shared and the beautiful relationships formed. My own work is about to shift and take off in ways that I have yet to fully understand. I will keep everyone posted on how this transformation continues to shape my work in the world.”

“Thank you, IDEX, for filling me up again with inspiration, helping me to step away from the fray and feel my roots again and my intention in this important work. These are such challenging, difficult, and beautiful times and returning from the Academy I felt very much rejuvenated and inspired to be a better person over all.”

“The whole experience was life changing and it has left me thinking about this work in a new way that brings hope to my heart.”

“Thank you so much again for holding such a wonderful Academy! I am so inspired by IDEX's vision and deep work. I think the group size was also perfect. It felt intimate to have a tight knit group of impact influencers, so I would keep to that size. Also, the mentor structure is brilliant.”

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 move a minimum of \$18 million philanthropic dollars annually. This is particularly significant because the post-Academy survey revealed that over 89% of survey respondents are very likely to channel additional philanthropic dollars to international grassroots groups and 100% of survey respondents are at least somewhat likely to do so.

III. Conclusions and Lessons Learned

IDEX is committed to excellence and learning and uses every opportunity possible to improve its services and partnerships. This second IDEX Academy brought out a new set of lessons that IDEX will consider for future programs. For example, this second Academy confirmed that the ideal cohort for such a program is approximately 15 participants. Such a size allows for meaningful discussion and authentic relationship while also including a wide variety of perspectives. This Academy also demonstrated that even though the facilitators were all greatly appreciated, the flow of the curriculum and sessions would benefit from more open and unscheduled time. Participants and staff noted that the Academy curriculum was rigorous and they would have appreciated more time to reflect and absorb the new information. This is particularly true of sessions that encouraged participants to reflect on major topics such as power dynamics, race, gender, and privilege. Finally, we are also learning how to improve the evaluation itself and ask better, more targeted questions to obtain the relevant information.