Learning Amid Disruption: Bouncing Forward Into a Changed World

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Introduction

The disruptions of 2020 took most of the world by surprise, and the philanthropic sector was no different. Yet, amid disruption, the sector is uniquely positioned to respond without the same restrictions, mandates, and limitations as seen in other sectors.

Humanity United is a small foundation with a global mandate. (See text box on page 31.) We leveraged much of this inherent flexibility within philanthropy during the cascading crises of 2020, starting down this path with many of the same historical organizational habits and challenges as our peer organizations in the sector. This is the story of Humanity United's journey through the crisis, a journey of adaptation, as told by three members (two staff members and one consultant) of the foundation's strategy, learning, and impact team, henceforth referred to as the learning team.

As an organization, we had in years prior made a shift toward a systems and complexity orientation for our programmatic work, while also holding on to vestiges of strategic philanthropy[1] (including a focus on theories of change, expected outcomes, and predetermined grant-level indicators) that remained embedded in our beliefs and practices. When COVID-19 shut down our offices and, overnight, radically disrupted the systems in which we operated, we — like many foundations — were left contemplating our existing multiyear strategies that could not address the crisis at hand and likely would not be the right fit for the future that was

Key Points

- The philanthropic sector has come to recognize the importance of bringing a systems lens to its work, seeking to influence upstream drivers of complex problems, and being adaptive in its approaches instead of implementing static, multiyear plans. Yet, integrating these concepts into practice continues to pose a challenge.

- Humanity United — a foundation dedicated to cultivating the conditions for enduring freedom and peace — had been grappling with this charge when the disruption caused by COVID-19 led it into a crisis response mode in 2020, similar to many other philanthropic institutions. That disruption also challenged our old ways of being, doing, and thinking, leading to new insights and actions related to equity and power-sharing.

- This article explores the journey Humanity United went through in 2020, focusing on the disruption as a moment to bounce forward rather than trying to preserve the past. We found ourselves rethinking our old ways of seeking to change systems and embracing the future as emergent and unpredictable. We leaned into foresight, complexity science, and emergent strategy as tools for tackling this uncertainty. We pushed ourselves at all levels of leadership and staff to understand our role, our power, and how to show up differently with our partners in the systems we collectively seek to transform.

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[1] Strategic philanthropy is an approach to charitable giving that is business-like and data-driven, with a goal of efficient use of resources to solve problems defined by the philanthropic organization (Bennett et al., 2021).

unfolding. The shifts of 2020 — including the worldwide pandemic, a growing racial justice movement, and the increasing call to prioritize local voices in international development — helped Humanity United move more quickly toward a more adaptive approach to both our strategy and learning practices, shedding some elements of strategic philanthropy that had previously hindered our nimbleness. We believe our journey is relevant to other foundations seeking to advance equity and justice by influencing complex, dynamic systems amid what is likely to be a future of many disruptions of different types.

The Collective Disruption

In March 2020, COVID-19 was declared a global pandemic and overnight we found our existing practices no longer fully aligned with the systems' needs. Migrant workers supported by our grantees and partners saw their workplaces closed and faced increasing stigmatization, and many were trapped or experienced great difficulty getting back to their families. International nongovernmental organizations pulled their expatriate staff out of the Global South, creating an opportunity for more autonomy for local staff but also leaving space for autocratic governments to restrict civic space. Our front-line partners who were working on shifting institutions and structural elements of the system suddenly found themselves stepping into direct service provision to meet the crushing needs created by COVID-19. Instead of being concerned about our grantees' planned outcomes, staff were concerned about grantees' safety, resilience, and ability to adapt to the most pressing and previously unanticipated needs related to the pandemic.

This was a moment of crisis response at Humanity United, similar to what many other foundations worldwide experienced. We could have stayed in this place, focusing on meeting crisis needs, while preparing to bounce back into the strategies we had planned. We could have continued to monitor progress against preplanned goals, permitting a slowdown but not asking about whether to rethink and redirect. In fact, as of May 2020, we were seeing tools

Humanity United

Humanity United is a private foundation launched in 2008. With a grantmaking budget of approximately $20 million, its work focuses primarily on two specific portfolios: forced labor and human trafficking, and peacebuilding.

Staff deploy a range of philanthropic vehicles, including tools that go beyond traditional financial support, among them network development, policy advocacy, strategic communications, support to independent media and journalism, and some foundation-led initiatives.

Humanity United is active in the United States, Latin America, Asia, and Africa, and engages in influence strategies aimed at global institutions and audiences. It invites proposals for funding from select organizations on a rolling basis.

Humanity United is part of the Omidyar Group, which includes a family of organizations and a robust internal systems and complexity community of practice with other strategy, learning, and impact-oriented staff.

and resources shared across the philanthropic field to help organizations ensure current strategies remained on track while simultaneously addressing the crisis.

Perhaps because we were already exploring shifts in our practice from within multiple parts of the organization, that is not how Humanity United responded. We did not bounce back, but rather sought to bounce forward with "radical resilience" (Jon & Purcell, 2018) into a changed world. Resilience has often resulted in a focus on protecting the status quo (Suarez, 2020). However, "radical" resilience focuses instead of concepts of hope, renewal, and transformation, on "bouncing forward" (Cretney & Bond, 2014) into something new. Resilience in this conceptualization is a practice that leans heavily into learning, and is about adaptation — not just in pathways to change, but even in our

understanding of which changes matter (Lynn, Nolan, & Waring, 2021).

Adapting Forward

Our adaptations in 2020 included crisis response alongside significant shifts in our longer-term practices, with which we are still grappling and experimenting. (See Figure 1.) The way we adapted enabled us to continue to embrace and deepen our systems-change focus; strengthen our commitment and actions related to diversity, equity, inclusion, and justice (DEIJ); bring new attention to power dynamics internally and externally; embrace complexity more deeply as a way of understanding the systems we work in; expand our comfort with working in emergent ways; build more resilience by preparing for different possible futures; and live into our commitment to being flexible and responsive in our evaluation and learning practices.

Embedded in all of these changes are core concepts that may not be familiar to all readers. We will delve into these ideas more throughout the article. As a start, however, we understand these concepts in the following ways:

- *Systems change:* Bringing a systems orientation to our work means we are focused on how structures, relationships, resources, power, and narratives are changing and need to change in order to address complex problems. We are aiming our work at supporting partners who are changing the underlying drivers of behaviors in the system, rather than only alleviating the current pains caused by a broken system.

- *Complexity:* Complexity in our work refers to our recognition of the nonlinear, unpredictable ways in which change happens in systems. Complex, adaptive systems cannot be influenced effectively through preplanned, static strategies, as they are themselves always in flux and often changing in ways that are unexpected.

- *Emergent strategy:* Emergent strategy means to us that we view strategy and learning as operating in mutually dependent, iterative cycles, where a clear strategic intent can be planned but must also be held lightly, and outcomes cannot be predicted. We seek to attend to the power dynamics inherent in strategy design processes. Emergent strategy prioritizes bringing together stakeholders closest to the problem to identify and propose different ways to address complex problems. We look to anticipate and welcome competing hypotheses of how change will happen.
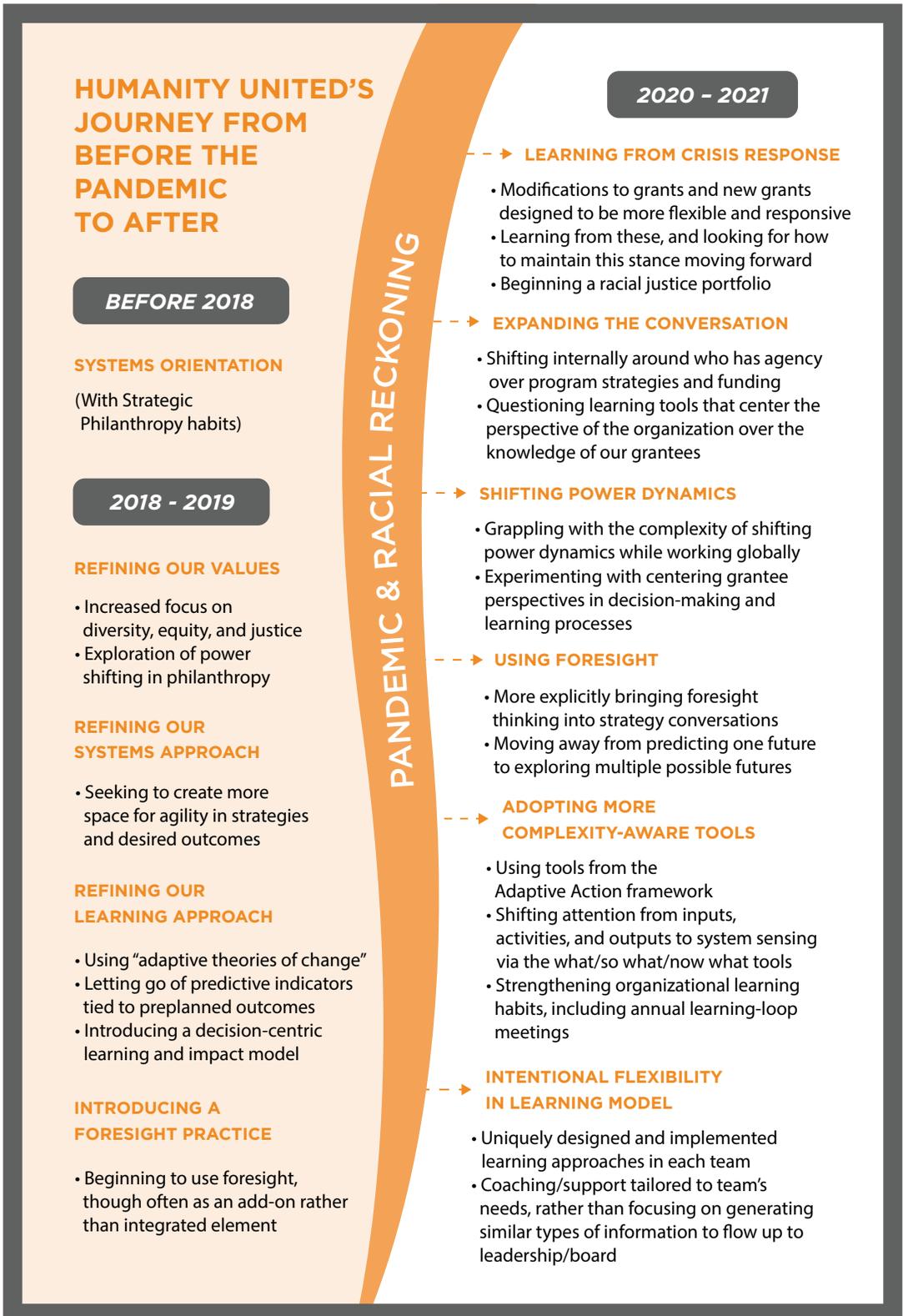
- *Foresight:* Foresight is a practice we are bringing into our work in order to give us new ways of thinking about the future that are not predictive. Foresight refers to a set of tools that help us to imagine a variety of futures, which prepares us to be more ready to respond as the future unfolds and helps us be more intentional in pursuing the future we hope will unfold.

Learning From Crisis Response

Historically, Humanity United had a rolling grant-application process where program staff identified grantees and invited them to apply through a structured process. The pandemic pushed us to revise that model. Like many foundations, we experienced a surplus of funds as a result of reduced travel and operational costs. Through an internal deliberative process, we distributed these funds as needed, predominantly to existing grantees, and opened up new lines of general operating support to place-based organizations that were dealing with COVID-19 and racial inequities in the U.S. communities where we live (Gopal, 2020).

Additionally, many existing grants in our portfolios were modified in some way due to COVID-19 — to change the scope of the project, shift the funds to general operating support, extend the timeline for the use of funds, or increase funding. Over the course of the pandemic, there has been a greater interest in general operating support and greater attention to whether our grants are going to U.S. intermediaries or directly to our grantees based in other countries. Similar to many of our peer foundations, we are now asking ourselves whether the flexibility in the funding structures we used

FIGURE 1 Our Adaptations

HUMANITY UNITED'S JOURNEY FROM BEFORE THE PANDEMIC TO AFTER

BEFORE 2018

SYSTEMS ORIENTATION

(With Strategic
Philanthropy habits)

2018 - 2019

REFINING OUR VALUES

• Increased focus on
diversity, equity, and justice
• Exploration of power
shifting in philanthropy

**REFINING OUR
SYSTEMS APPROACH**

• Seeking to create more
space for agility in strategies
and desired outcomes

**REFINING OUR
LEARNING APPROACH**

• Using "adaptive theories of change"
• Letting go of predictive indicators
tied to preplanned outcomes
• Introducing a decision-centric
learning and impact model

**INTRODUCING A
FORESIGHT PRACTICE**

• Beginning to use foresight,
though often as an add-on rather
than integrated element

PANDEMIC & RACIAL RECKONING

2020 – 2021

LEARNING FROM CRISIS RESPONSE

• Modifications to grants and new grants
designed to be more flexible and responsive
• Learning from these, and looking for how
to maintain this stance moving forward
• Beginning a racial justice portfolio

EXPANDING THE CONVERSATION

• Shifting internally around who has agency
over program strategies and funding
• Questioning learning tools that center the
perspective of the organization over the
knowledge of our grantees

SHIFTING POWER DYNAMICS

• Grappling with the complexity of shifting
power dynamics while working globally
• Experimenting with centering grantee
perspectives in decision-making and
learning processes

USING FORESIGHT

• More explicitly bringing foresight
thinking into strategy conversations
• Moving away from predicting one future
to exploring multiple possible futures

**ADOPTING MORE
COMPLEXITY-AWARE TOOLS**

• Using tools from the
Adaptive Action framework
• Shifting attention from inputs,
activities, and outputs to system sensing
via the what/so what/now what tools
• Strengthening organizational learning
habits, including annual learning-loop
meetings

**INTENTIONAL FLEXIBILITY
IN LEARNING MODEL**

• Uniquely designed and implemented
learning approaches in each team
• Coaching/support tailored to team's
needs, rather than focusing on generating
similar types of information to flow up to
leadership/board

during crisis response might also belong in other parts of our work.

Expanding Internal Conversations

In 2020, we saw the conversation around philanthropic distance and privilege build momentum in the wake of a racial reckoning in the United States following the murder of George Floyd and the resulting protests. In response, our staff began asking hard questions about ownership of strategy and funding decisions, and questioning "how far does the circle of agency extends" (Darling, Guber, Smith, & Stiles, 2016, p. 61).

Prior to the pandemic, Humanity United articulated a values-centric approach, including a commitment to DEIJ. While the three-pronged commitment to DEI is widely made, the foundation added the term "justice" to indicate why we are doing this work. In other words, our DEI efforts are in service to justice, a way of thinking that was reinforced by the work of Justice Funders (2019). We also articulated organizational values and what it looks like to deploy strategy and learning within these values. (See Figure 2.) Program staff took the lead in exploring power shifting in philanthropy, how we show up as a foundation, and implementing DEIJ principles within the organization.

In 2020, Humanity United's organizational energy and commitment to DEIJ strengthened, and we began identity-based caucusing and developing a team-based inquiry process that each of our portfolio and operational teams use to explore how our DEIJ principles can best be integrated into our internal and external work. We also launched an exploratory pool of funding for racial justice. Our conversations about race, power, and privilege started to include board and leadership members, while continuing to be driven by staff throughout the organization. We can look back and see a possible tipping point, where program staff's questions about our role as funders began to echo at all levels

of Humanity United and within the Omidyar Group more broadly. We began to explore who decides (and who should decide) program strategies and funding, and how the foundation can be positioned to be part of a bigger conversation around "decolonizing wealth," to borrow a phrase from Edgar Villanueva (2018). Board and leadership participation in and enthusiasm for these discussions was an important signal at Humanity United for more rapid movement toward a DEIJ mindset and culture shift that mirrors the changes happening in the world of philanthropy.

At a practical level, this has led to open and honest conversations about tools previously deployed by our learning team. Some program staff are now actively questioning if it is appropriate for Humanity United to identify our own perspectives on pathways to social change, and when we should instead lean toward supporting the communities and partners we fund to act on the pathways they see and prioritize. Staff are asking important questions about whose priorities should shape a learning plan, and how more equitable learning might transform current practices. Staff have also translated their thinking on these topics into a new, internally oriented organizational strategy and draft theory of philanthropy that touch every aspect of Humanity United.

Shifting Participation and Power Dynamics

Complexity theorists tell us that in human systems, it makes the most sense for a diverse set of actors with intricate, embedded stakes in the system to develop a clear and shared vision, and then take the "next wise action," using the language of the Adaptive Action framework.[2] The shift in power that this implies — where decisions about program and strategy are made by grantees and communities, rather than staff and boardrooms — can be difficult to envision and implement at all levels of systems change.

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[2] The Adaptive Action framework has been developed at the Human Systems Dynamics Institute under the leadership of Glenda Eoyang (Eoyang & Holladay, 2013). We have been influenced as a team by other complexity science frameworks, including the Cynefin Centre/Cognitive Edge and the work of David Snowden, whose analogue to "taking the next wise action" in complexity would be to follow the order of "probe-sense-respond," versus the order of "sense-analyze-respond," in a complicated system (Snowden & Boone, 2007).

FIGURE 2 Our Values
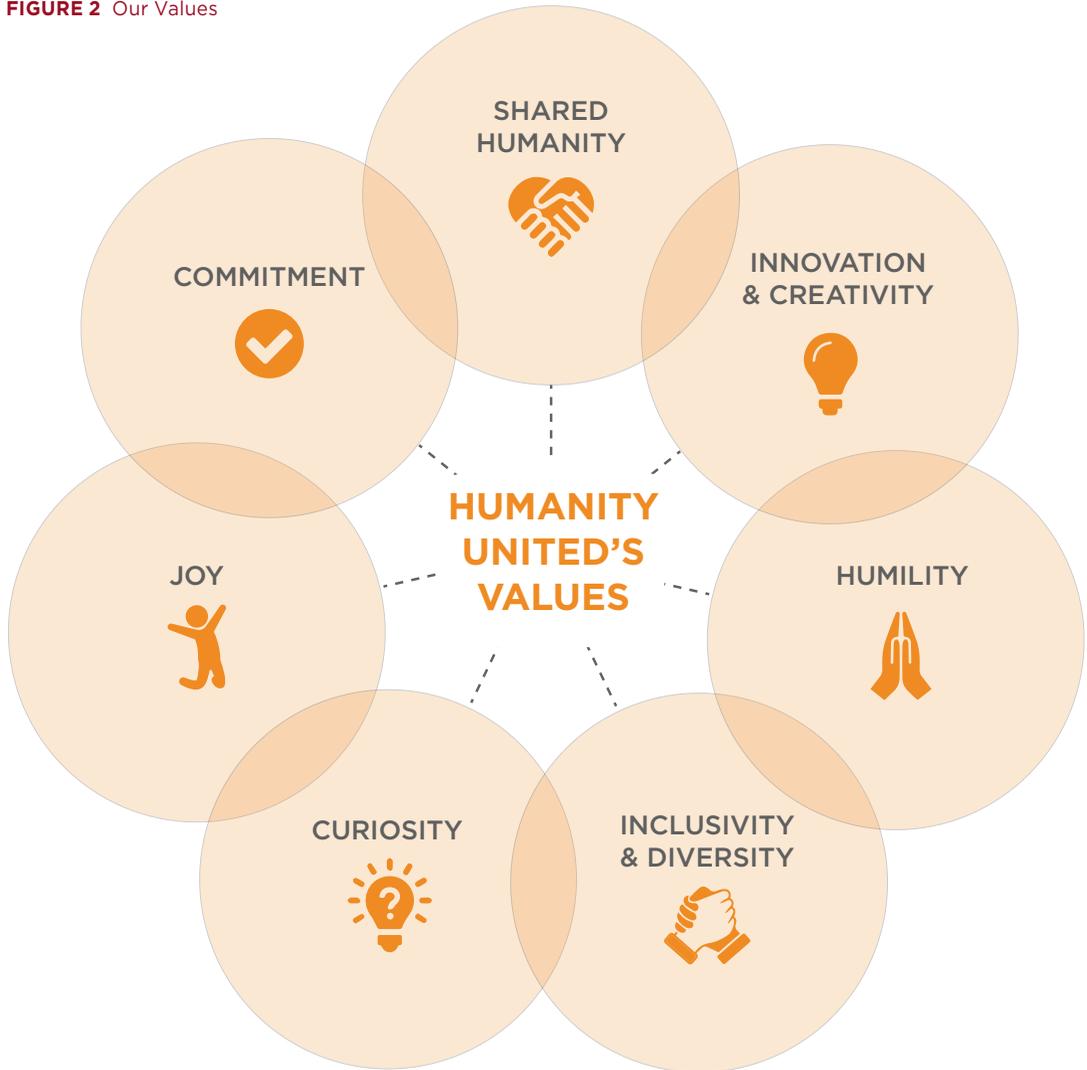
As a small foundation with a global reach, Humanity United has struggled with the logistics of shifting power dynamics. Some of our projects work at a micro level, designed to rely on staff with deep experience in the context and deep partnerships on the ground, and who can be part of a community of organizers seeking change. Other programs work at a macro level, engaging with a breadth of actors from across the spectrum of business, government, civil society, journalism, etc., to shift multinational or transnational institutions, narratives, and global practice. Emergence and equity look quite different at these two scales; we are still working out whose voices to center (and how), as well as exploring how to support translocal networks that bridge macro, meso, and micro scales.

Yet, even with these challenges, many staff have been centering grantee perspectives and decisions, and learning practices are seeking to engage grantees in new ways. This year of disruption made more transparent than ever how contexts can change very rapidly, and we have witnessed how many grantees are inherently able to respond quickly and in ways closely tied

The Origins of the Terms Reparative & Regenerative Philanthropy

Reparative philanthropy is a phrase coined by activists seeking for philanthropy to make direct payments to Black and Indigenous peoples in order to address racial wealth gaps responsible for historical and present-day inequalities. The Decolonizing Wealth Project and the Neighborhood Funders Group held a webinar series in early 2021 entitled "Philanthropy and the Case for Reparations," borrowing the name from the influential article by Ta-Nehisi Coates (2014) for The Atlantic, "The Case for Reparations."

Regenerative philanthropy is a term borrowed from Justice Funders' (2019) Resonance Framework. It places types of philanthropy on a series of spectra, from extractive to regenerative, and supports foundations in identifying and moving along those spectra.

to the changes happening in the system. Like others in the philanthropic field, responding to the events of 2020 helped us to understand this more fully and to rethink the distribution of power and ability to adapt; now, we are learning how to act in new ways.

For example, one of our teams has created an external advisory board; another is taking a deep dive into trust-based philanthropy,[3] having honest discussions about our role as funders and partners and the many modes of shifting power. Several are exploring how to incorporate end-beneficiaries, those affected by violence and exploitation, into ongoing program strategy and learning conversations. Our board and leadership are also having deep conversations about the importance of trust-based philanthropy as a guiding principle for the organization (Gopal, 2021). While we have

not moved all the way to a "regenerative" or "reparative-focused" fund, as advocated by those on the vanguard of philanthropic reform, we do believe that our staff is taking a series of "next wise actions" along the path. It is clear that the will is there to start talking openly and honestly about what is possible.

Foresight as a Tool for Breaking Out of Habitual Thinking and Increasing Equity

At the end of 2019, influenced by Eshanthi Ranasinghe via the Omidyar Group's systems and complexity community of practice, we introduced foresight as an optional add-on to our existing strategy and learning practice (Ranasinghe, 2019; Ranasinghe & Hsu, 2020). The foresight practice offered us a new way of thinking about the future, one that let go of the desire to predict and instead explored different possible futures and their many implications for our strategies:

> Foresight is not about predicting the future. … Instead, foresight is about imagining many different futures: positive futures, negative futures, weird futures, and amazing futures. By imagining all of these possible futures, we can begin talking about which futures we want to live and work in — and then take practical steps today to make those futures more likely. (Jeffrey & Lamb, 2020)

With the advance of the pandemic, our learning team invested additional time in embedding our emerging foresight practice, hypothesizing that the widespread failure to prepare for the sorts of disruptions the pandemic wrought could have been mitigated through an embedded, intentional, and inclusive foresight practice. Whether it is conflict, a natural disaster, or an unexpected regime change, major disruptions are common in the systems in which we work. The degree to which grantee and foundation strategies had to be paused, retooled, and adapted in 2020 increased the appetite for more

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[3] Trust-based philanthropy is "an approach to giving that addresses the inherent power imbalances between funders, nonprofits, and the communities they serve. At its core, trust-based philanthropy is about redistributing power — systemically, organizationally, and interpersonally — in service of a healthier and more equitable nonprofit ecosystem. On a practical level, this includes multiyear unrestricted giving, streamlined applications and reporting, and a commitment to building relationships based on transparency, dialogue, and mutual learning" (Trust-Based Philanthropy Project, 2021, p. 1).

foresight-oriented thinking across the organization to imagine and prepare for multiple futures.

We have been heavily influenced by the work of Pupul Bisht (2019) to advance "decolonized futures" mindsets and methods, in recognition that traditional foresight practices — based on "expert" knowledge and founded upon U.S. military exercises — are inappropriate for contexts in the Global South. When done well, we have seen how foresight can be a tool to advance equity. Our program teams are now using foresight in diverse ways: some as an internal exploration tool, some to engage generatively with leadership and the board, some to co-sense across the broader Omidyar Group, and some to engage collaboratively with key activists and stakeholders to imagine multiple possible futures, helping to challenge assumptions, blind spots, and interventions.

For example, our peacebuilding team engaged with several partners to work collaboratively with peace activists from around the world to explore the peacebuilding system and imagine alternative futures. Using a futures technique where you design a "thing from the future"[4] participants co-created their desired visions for the future. The team is also actively engaging staff across Humanity United and the larger Omidyar Group in futures (including during Humanity United's annual retreat and at our Omidyar Group Ohana gathering) to inspire creative thinking and orient around the future we want to be part of creating.

The learning team has intentionally woven more futures-oriented mindsets into our strategy practice and tool kits, and supported foresight training for program staff. Organizationally, however, we are not at the point of wholesale adoption of a new and

The degree to which grantee and foundation strategies had to be paused, retooled, and adapted in 2020 increased the appetite for more foresight-oriented thinking across the organization to imagine and prepare for multiple futures.

potentially burdensome process, favoring instead a shift in mindsets and, only where useful, targeted shifts in practice. The main pushback we receive on integrating foresight thinking and praxis into our strategies comes from a desire to steward limited attention on what is immediately useful and actionable.

Intentional Adoption of More Complexity-Aware Tools

For years before and continuing into 2020, the learning team invested in building our understanding of systems thinking and complexity science. In 2014, we made an explicit shift toward a systems orientation in our strategy practice in response to increasingly common criticisms of strategic philanthropy.[5] Grounded in the work of Rob Ricigliano, the systems and complexity coach for the Omidyar Group (2017), our systems practice:

> is both a specific methodology … and a more general approach to grappling with adaptive problems in complex environments with the aim of making enduring social change at scale. A systems practice helps answer three basic questions: How does the environment within which you work operate as a

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[4] In foresight practices, a "thing from the future" is a powerful prompt to help people make concrete the abstract idea of the future, both future values and future actions. The participants were invited to make future objects, such as a poster showcasing their principles, a manifesto for peacebuilders of the future, a podcast or interview with a peacebuilder, etc.

[5] As Katherine Fulton (2018) writes: "Strategic philanthropy believes the way to create change is to decide on a goal that matters and then figure out what it will take to achieve it." Later in her essay, Fulton lays out its basic problem: "The brutal truth about philanthropy is that those with the power to make decisions are often those who have the least direct knowledge about the problems or opportunities being addressed." (For more from the ongoing and robust conversation in the field about the shortcomings of strategic philanthropy, see, e.g., Meiksins, 2013; Brest, 2015; Le, 2017.)

Organizationally, we had begun to realize that while we embraced a systems lens, both our strategy and our learning practices were not nimble enough for the complexity of the systems we sought to influence.

complex, dynamic system? How will your strategy engage the system in order to have highly leveraged impact? How will you test your assumptions and hypotheses so you can learn and adapt effectively? (p. 7)

Our systems approach has been central to the organization, including being in our very mission: to cultivate the conditions for enduring peace and freedom. We believe that changing the conditions requires understanding how governments, the private sector, individuals, culture, history, and other aspects of a given context limit or enable different types of action.

This approach to strategy and learning in the systems-change space historically revolved around a multistep systems-sensing process explicitly focused on identifying leverage areas to unleash critical shifts in the system. It included the generation of causal-loop maps[6] as a way to begin to disentangle the complexity of the systems we aimed to influence, including human trafficking, forced labor, and peacebuilding, in local and global contexts. To match with our causal-loop maps, program staff were asked to identify potential outcomes not only at the initial entry points into a system but also further

down the road, essentially creating a long chain of outcomes, some of which would be a decade or more into the future. Additionally, many of our impact measurement tools still relied on traditional outcome-tracking processes that were designed for simple or complicated problems. We were experiencing the stickiness of strategic philanthropy, even for an organization committed to orienting toward more adaptive, emergent, and equitable practices.[7]
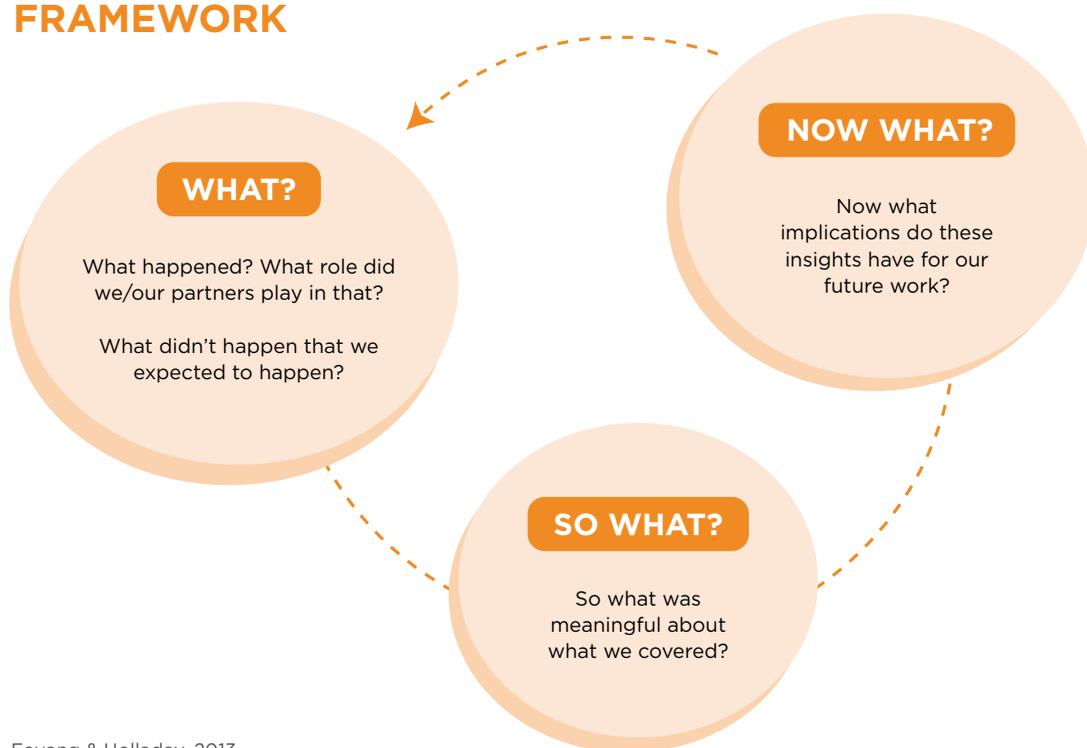
Organizationally, we had begun to realize that while we embraced a systems lens, both our strategy and our learning practices were not nimble enough for the complexity of the systems we sought to influence. We had historically recognized that our work is deeply complex, which suggests we cannot make a static plan and implement it, expecting success to follow. Yet, even as we encouraged experimentation, innovation, co-creation, and adaptation to maximize impact, we had continued to ask for predicted outcomes in ways that discouraged a focus on emergence. We had also not clarified with the board how much we could adapt these strategies in the face of changes in the system or changes to our understanding of what works, without going through a time-consuming strategy refresh process with the board, which had the unintended effect of dampening staff's willingness to adapt their strategies or, at least, discuss their adaptations. In addition, the existing processes kept decision rights inside the foundation and divorced from the fast-moving realities on the ground. Our systems and learning practices, though well researched and carefully designed, tended to over-invest upfront in identifying what was knowable and what could be planned for, resulting in the unintended impact of creating a relatively static view of the systems and subsequent strategies.

[6] A causal-loop map is a type of systems map. It is designed to visually represent key factors, issues, or behaviors in the system and show how they are interconnected, including which ones influence others. These diagrams show them as text or small circles, and the causal relationships are represented as arrows. They can be created in participatory ways, as Humanity United (2017) has done, with potential grantees and other partners.

[7] While this article does not have the space to enter into the conversation on complex versus complicated, the authors agree that the strategic philanthropy model from which we are attempting to shift is largely based on a view of human systems as complicated, rather than complex.

FIGURE 3 The Adaption Action Framework

ADAPTIVE ACTION FRAMEWORK

WHAT?

What happened? What role did we/our partners play in that?

What didn't happen that we expected to happen?

NOW WHAT?

Now what implications do these insights have for our future work?

SO WHAT?

So what was meaningful about what we covered?

Eoyang & Holladay, 2013

In 2020, it became increasingly clear how staff were hitting up against these unintentionally onerous and rigid structural barriers, thus complicating their ability to address challenges with the nimbleness they needed to be successful. With growing staff expertise in the application of complexity sciences, the reorganization of our program work into broad portfolios that were approved at a higher strategic level with the board, as well as an increased familiarity with trust-based and equitable grantmaking, we began a gradual move toward addressing these shortcomings. Building on input from staff and the influential work of Tanya Beer (2019), the learning team also proposed a new plan for board engagement and organizational learning based on the Adaptive Action framework (Eoyang & Holladay, 2013). The plan was adopted, and the board articulated that the need to respond and adapt superseded the need to report on predetermined and illustrative indicators (See Figure 3.)

Concurrently, we sought to build this culture by instituting an annual learning-loop meeting, where we used the Adaptive Action framework to discuss team learning and adaptation across the organization. The framework focused attention away from inputs, activities, outputs, and outcomes — almost none of which would have occurred as expected at the outset of 2020 — and toward how our staff's ongoing learning and reflection helped them to be prepared to pivot as the systems in which we work convulsed. Each team presented in a "what, so what, now what" framework, emphasizing what and how they had learned and adapted to meet grantee-identified needs, and how they changed their practices to be more aligned with DEIJ goals and/or shifting power.

While the pandemic produced the conditions to illuminate the mismatch between our strategic philanthropy habits and our rapidly changing contexts, it will continue to be a useful framework as we bounce forward into a new normal.

Importantly, these meetings were separated from organizational reporting requirements. We are optimistic that continued implementation of these annual meetings will offer a safe space to talk about adaptation and lessons learned, reinforcing our collective effort to do our work more emergently. They are also an all-too-rare place for our operations and program teams to have cross-organizational generative conversations about, for example, being responsive to shifting grantee needs by alleviating less necessary grantmaking, compliance, and finance administrative burdens.

This need for complexity-aware frameworks exists in all complex human systems before and after the pandemic. While the pandemic produced the conditions to illuminate the mismatch between our strategic philanthropy habits and our rapidly changing contexts, it will continue to be a useful framework as we bounce forward into a new normal.

Intentional Flexibility With Our Learning Model

Our learning team had envisioned 2020 as the year we would roll out a new, well-designed, fully articulated decision-based model for learning and impact, documented in a tool kit with a variety of options for approaching the work, but ultimately fairly directed in its intent. This new practice was based on a transition we had begun in 2019, where we developed and piloted a decision-centric learning and impact model. This model prioritized identifying key decisions at the tactical, strategic, and systemic levels, surfacing questions that might need to be answered at those decision points, identifying evidence to answer the questions, and developing a cadence for the learning tied to those decisions.

Recognizing the limitations of traditional theories of change, the learning team also developed a model we called an "adaptive theory of change" that left more room for multiple and unpredicted pathways to change, and explicitly included a visual placeholder that assumed strategies and outcomes would need to be adapted as the system changed. (See Figure 4.) Some teams have chosen to use this approach to theory of change in their strategy planning process, and one team is using it as a tool for tracking insights gleaned from outcome harvesting[8] along the way.

The learning team pivoted in other ways as well, such as no longer requiring program staff to track strategy-level indicators or measure predetermined outcomes that were not useful to their team learning, systems sensing, and decision making. Historically, indicator tracking had been in place primarily to communicate to the board, with a habit of seeking indicators that were observable and countable, but not always meaningful. The shift away from these metrics was grounded in the belief that systems change is dynamic, complex, and not entirely predictable. With permission from the board to change how we report portfolio progress, we focused instead on helping teams develop ways of measuring and reporting on all significant change, positive or negative, whether or not we had predicted it.[9]

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[8] Outcome harvesting collects evidence on what has changed via stories about specific impacts, and explores the patterns across the stories. It can also include documenting how and whether an intervention has contributed to those changes, along with surfacing unintended outcomes (Lynn, Stachowiak, & Coffman, 2021).

[9] Our decision to transition the learning approach was heavily influenced by the existing literature on emergent strategy and learning models that are appropriate in highly adaptive and emergent settings, including the work of Patrizi, Heid Thompson, Coffman, & Beer, (2013); Darling et al., 2016; Darling, Sparkes Guber, Smith, & Lewis (2019); brown, (2017); and the prior work of one of the authors of this article, Jewlya Lynn (Lynn, 2012; Snow, Lynn, & Beer, 2015).
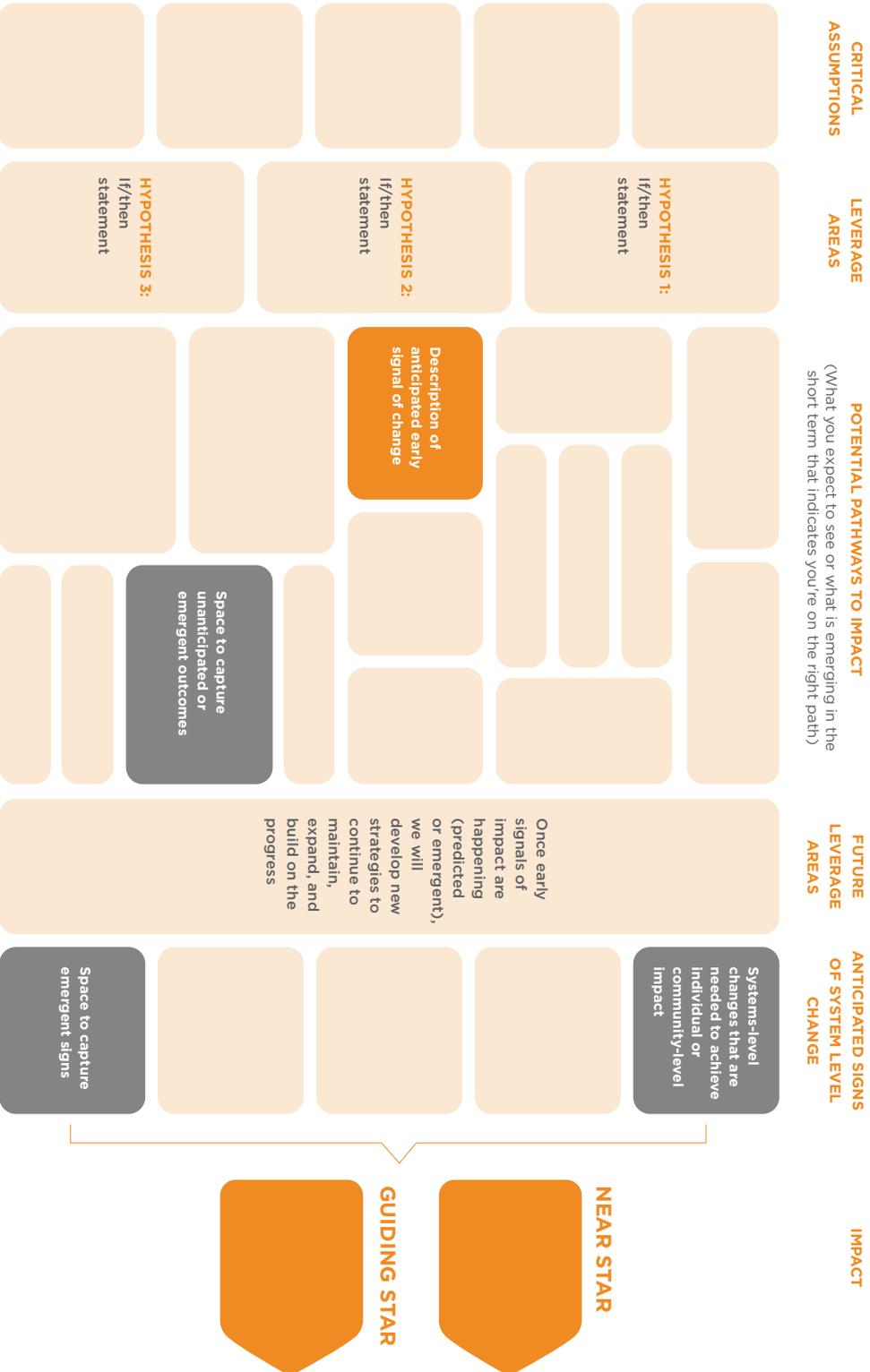
FIGURE 4 Adaptive Theory of Change Template

These are the challenges that, if we can make progress on them as a sector, will prepare us to be more radically resilient, adaptable, and open to learning when the next, inevitable crisis arises.

For example, the program that focuses on decreasing forced labor in the Southeast Asian seafood industry had 18 indicators in its 2018 dashboard, all of which tied back to a set of core assumptions about how change would happen. They included such things as "number of targeted amendments or policies adopted by the Thai government in support of improved labor practices" and "human trafficking cases prosecuted resulted in significant sentences or jail fines." The indicators were a mix of qualitative and quantitative, and the explanation of how and why they had changed was offered in an accompanying narrative. Program staff were clear that the indicators could not possibly capture the full value of the change happening in the complex seafood system, nor clearly indicate how the investments were contributing to those changes.

By 2021, that same program had transitioned to a focus on capturing systems changes and outcomes that were emerging in the industry and region, analyzing them quarterly for patterns, and using the insights from the analysis as part of a quarterly meeting with a key external partner. In this new approach, they surfaced in-depth insights about complex dynamics of labor migration in a pandemic that challenged existing patterns of migration in the years before 2020. Under normal circumstances, one would expect that increase in demand due to border closures would make it cheaper to migrate and could give workers more negotiating power, but the opposite is happening. With closed borders, exposure fears, and xenophobia, migrants already in the seafood industry are more

vulnerable to unscrupulous employers exploiting workers by further withholding wages and identity documents to prevent workers from leaving. The team also identified signals that the system is on the cusp of structural changes that are eroding the progress made in recent years. There is evidence that existing laws to protect workers are weakening; for example, new proposed changes to Thai law that will allow "apprentices" as young as 16 onboard fishing vessels, an occupation known to be notoriously dangerous and difficult.

As 2020's disruptions began, the learning team paused, assuming learning practices might fall to the wayside. However, internal demand was high for tools to help teams respond to the shifts they were experiencing externally, and so we adapted accordingly. We made a conscious decision to support significant diversity in the proposed learning plans across teams, focusing instead on ensuring the learning plans met the teams where they were at, helped to build critical learning and reflection muscles, and offered a longer-term pathway for increasingly sophisticated plans as teams were ready and interested. This was a significant shift from past practices emphasizing common approaches, leading to similar content generated across teams for board reporting.

By early 2021, our major program areas had each adopted their own uniquely designed decision-centric learning and impact plans and processes. The plans had in common a focus on learning about how Humanity United was showing up with partners (related to DEIJ, power shifting, and collaborative behaviors), and a focus on the larger system, including unpredicted (and unpredictable) changes. Plans differed on the types of decisions they prioritized, their learning processes, the cadence for learning, and the types of evidence they plan to use. For example, some teams are primarily leveraging experiential knowledge and capturing insights from partners, while others have outcome harvesting and other formalized evaluation and systems-sensing practices in place.

Additional Considerations for Philanthropy

As proud as we are of how our teams adapted, bouncing forward from 2020 into a changing world, we also recognize that there are many challenges ahead. These are not our challenges alone, but rather issues that philanthropy is facing more broadly, and that many philanthropic organizations are grappling with. These are the challenges that, if we can make progress on them as a sector, will prepare us to be more radically resilient, adaptable, and open to learning when the next, inevitable crisis arises.

We expect these paradigm-shifting moments of crises to continue to occur in part because of the confluence of major shifts globally (e.g., pandemics, climate change, global conflicts), leading to a significant era of change and break from the past. As Alex Steffen (2021) observes:

> To unlock insight into the world we're living in, it helps to remember that we're in a new era, surrounded by systems designed and built in the old. . . . Normal is dead, but the permanent weirdness we live in now is alive with possibility. (paras. 32, 36)

Organizations can use these moments to bounce forward or begin the exploration now to structure themselves for the necessary changes to come. From our experience bouncing forward, we believe the following practices are central to cultivate.

Taking Time for Emergence

Moving toward more fit-for-purpose ways of learning in complex systems is not possible unless philanthropy commits to reducing other workloads to intentionally free up time for learning and adapting. Without this space, it is difficult to have the mental bandwidth for the creative, out-of-the-box thinking needed for learning dialogues and strategy adaptation.

We recognize that as crises grow more severe and frequent, philanthropic organizations can expect more frequent, more extended, and more intense moments where time and emotional capacity for learning are restricted. This may be at least partially mitigated if the value of structured, shared learning is elevated in the organization over time, by leadership and in the culture more broadly. It can also be supported by deploying learning practices that are agile, that give up the slow, deliberate information gathering in exchange for timely, rapid insights (Abdill, 2021). We also recognize the importance of giving space for trauma (something Humanity United did intentionally, regularly, and in many ways throughout the year). As the pandemic recedes, philanthropic organizations would benefit from recognizing that trauma is part of living, not something that only happens during a pandemic, and continue to make room for it in learning and strategy processes.

Breaking the Habit of Predicting the Future

The tools of philanthropy (e.g., strategic plans, predicted outcomes, theories of change) and accompanying mindsets are typically grounded in assumptions about the future, often predicting a specific long-term future and a pathway to it, based on the understandings of staff who are far removed from the context.

At Humanity United, we revised our learning and impact practices concurrent with the organization beginning to use foresight practices. Yet, it took us time to realize that we were holding onto other tools and mindsets — particularly those around theories of change and outcome predicting — that imply you can predict a specific future. Though some teams value these other tools, they risk reinforcing habits that do not benefit our work. It necessitates rethinking how the tools are used — e.g., seeing theories of change as a jumping-off point to scan for outcomes, rather than the focus itself, or allowing for multiple (sometimes conflicting) theories.

Foresight work also introduces a new set of tools and mindsets to help philanthropy become prepared for multiple possible futures, and can be a tool for equity and trust-based philanthropy when those closest to the changes do their own future-sensing, using practices derived from their community. We do recognize that it can be hard to introduce foresight's mental models and

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practices into established strategy and learning processes, but the value of this type of thinking has come to the forefront amid the disruptions of 2020.

Foresight work can be one of the tools of emergent strategy. By bringing together emergence and foresight, philanthropy can hold more closely the notion that the systems we are all seeking to influence are unpredictable and inherently dynamic, and the opportunity is to work with others to disrupt and influence, not drive toward a predefined set of outcomes. Foresight can help philanthropy shift from predicting a future to being prepared for many different futures, some of which can be imagined and others of which may surprise us.

Philanthropy Must Relinquish Power, and Do It Collaboratively

When philanthropic strategies and learning plans assume the ability to have some measure of control over predictable outcomes in a system, a deviation from that plan can be seen as evidence of poor planning or implementation. The application of a complexity lens, however, begins with assuming that human systems are inherently unpredictable, and the strategy's goal (rather than achieving outcomes) becomes "learning to dance with a complex system" by acting, adapting, and acting again (Blignaut, 2019, building on the work of Donnella Meadows (2014)).

Whose dance is it, though?

We at Humanity United are not the only ones questioning whether philanthropy should be setting up the dance floor. The disruptions of 2020 have cast doubt among many philanthropic leaders about our collective top-down model of system change, especially that as actors initially outside the system, we can see and influence drivers and root causes with limited capital in ways that will shift the whole system. This is even more true outside of place-based philanthropy. The path to systems change is much more likely through releasing control over outcomes and focusing instead on increasing agency for actors to disrupt the system from within. This ongoing act of ceding the illusion of control and power is not solely the job of program staff, boards, or leadership, but the job of philanthropy at all levels, alongside grantees and other stakeholders.

Yet, before we all rush to do this work, we must consider how ceding our power over strategy, while expecting grantees to advance toward our collective long-term goals for a system, creates its own type of mess. How can grantees assemble around and co-create with one philanthropic organization, while other funders may express different needs? As philanthropists, what is our responsibility to bring together funders to join this process, while separately aligning our back-end needs and processes rather than placing the onus of alignment on grantees? And how might we do this collaborative work given the very different places our institutions are at with regards to releasing power and control?

Conclusion

We doubt anyone at Humanity United or in other philanthropic organizations wants to live through another 2020 or 2021. Yet, how all of us at Humanity United learned and changed during these two years was important, not just for supporting grantees and each other during crisis, but for becoming a more responsive, emergent, equitable, and hopefully more effective foundation.

We are committed to cultivating the conditions for enduring peace and freedom in complex and ever-changing systems, and that commitment

requires us to keep learning and growing. Perhaps the occasional radical disruption to our thinking and practice is a critical part of that growth. After all, we recognize that one of the core concepts of systems-change work (and we are a system as well) is the need to disrupt the current patterns to make way for something newer and better.

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