Inquiry-Driven Grantmaking: A Guide for Measurement, Evaluation & Learning Staff

Overview

AS EVALUATION and learning staff, you design systems for assessing grant effectiveness, synthesizing insights across portfolios, and demonstrating impact to boards and stakeholders. An inquiry-driven approach fundamentally reframes your work; instead of measuring predetermined outcomes, you assess the quality of learning. Instead of proving success or failure, you track how questions evolve, what insights emerge, and how findings reshape strategy. Your role shifts from compliance monitor to knowledge architect. You design systems that help the foundation learn faster, adapt more nimbly, and share insights more generously.

Why It Matters Now

Traditional evaluation frameworks do not always capture meaningful data. For their part, grantees spend enormous time reporting metrics that rarely inform decisions. Foundations chase "proof of impact" in contexts too complex for clean attribution. Meanwhile, valuable learning goes undocumented because it doesn't fit standard reporting templates. Those templates do not prioritize reflections about what didn't work, what was surprising, and what questions need deeper exploration.

An inquiry-driven approach allows you to:

- Design evaluation systems that generate actionable insights rather than performative metrics.
- Create space to generate field knowledge from productive failures and negative results.
- Build learning loops where insights reshape strategy rather than sitting in reports.
- Redefine and demonstrate impact through quality of questions asked, rigor of investigation, and strategic adaptation.
- Position evaluation as partnership and learning rather than surveillance and judgment.

Possible Actions You Can Take

Tactical (Start This Quarter)

- **Revise reporting templates**: Add these questions to standard reports: What surprised you? What would you do differently? What new questions emerged?
- **Track questions**: Create a simple spreadsheet documenting each grant's core question. This spreadsheet can then be used to track how that question changes over time and what causes the shift.
- **Look for patterns across reports:** When reviewing reports from grantees and/or program officers, tag insights that: (1) challenge assumptions, (2) generate new questions, (3) suggest strategic pivots, or (4) connect across portfolios.
- **Use "So what, now what" synthesis**: For your next round of grant reports, don't just summarize findings. Rather, ask the following questions: (1) What patterns emerged? (2) What does this mean?, and (3) What actions should we take?
- **Make learning visible:** Create a one-page "insight of the month" that synthesizes one surprising finding across grants. Share it with program staff.

Strategic (This Year)

- **Co-design metrics with grantees:** For new grants, involve grantees in identifying how to measure learning as an indicator of success (working with program officers as appropriate). Offer menu of evidence options, including qualitative, quantitative, and participatory evidence..

- **Rethink evaluation frameworks:** Develop criteria for assessing quality of learning. Criteria should relate to the sharpness of questions, the rigor of inquiry, the grantee's willingness to pivot, and the grant's contribution to field knowledge. Pilot the criteria with three to five grants.
- **Build qualitative data infrastructure:** Implement qualitative data analysis tools (like Atlas.TI) or AI powered research tools (like NotebookLM) to systematically code and analyze narrative data from reports and check-ins.
- **Create visual learning maps:** Use tools like Miro to map connections between portfolio questions, grant hypotheses, and emerging insights. Share with program teams quarterly.
- **Establish a negative results repository:** Create a system for documenting and sharing with relevant stakeholders what didn't work and why, treating failures as valuable as successes.

Cultural (Long-term Investment)

- **Shift evaluation language:** Replace "Did you achieve outcomes?" with "What did you learn?" in all communications with grantees. Replace "success metrics" with "learning indicators."
- **Build evaluation literacy:** Create resources that help program staff and grantees understand the difference between compliance reporting and action-oriented evaluation.
- **Advocate for learning budgets:** Propose that 10-15% of grant budgets explicitly fund learning activities such as convenings, documentation, reflection time, and peer exchanges.
- **Model uncertainty:** In board reports, explicitly name what you don't yet know, what assumptions might be wrong, and what questions need deeper investigation.
- **Create feedback loops:** Make learning actionable by designing mechanisms for evaluation insights to trigger strategy discussions.

Next Steps

This week: Review your most recent evaluation reports. Circle findings that generated new questions or challenged assumptions. How many findings are there? How were those findings used?

This month: Schedule conversations with three program officers to learn what insights they need to make better decisions. What questions are they asking that current evaluation doesn't answer?

This quarter: Pilot one learning-focused evaluation with a willing grantee (working with program officers as appropriate). Co-design the questions together. Document what changes.

This year: Propose to leadership that the annual evaluation report be replaced by a learning agenda progress report that tracks question evolution, insight generation, and strategic adaptation.

Remember: You're not abandoning rigor; you're applying it to different questions. Measuring learning is methodologically challenging, but offers tremendous opportunities for deeper impact. Start small, document what you learn, and build the case for broader transformation. Organizational culture change takes time, but your work designing new systems and metrics creates the infrastructure that makes inquiry-driven grantmaking sustainable.

SIEGEL FAMILY ENDOWMENT