# SIEGEL FAMILY ENDOWMENT

# Welcome!

## Thanks for joining us.

## We will begin shortly.

*2025 Siegel Ask Me Anything Webinar*

# Today's Agenda

**1** **Welcome Remarks** by Katy Knight, President and Executive Director of Siegel Family Endowment — 1:00 - 1:05 pm

**2** **Presentation by SFE Team** on 2025 strategic approach — 1:05 - 1:30pm

**3** **Moderated Q&A** facilitated by Laura Maher, Director of External Engagement — 1:30 - 2:10 pm

**4** **Closing** and where you can connect with us next — 2:10 - 2:15 pm

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Opening remarks from President and Executive Director of Siegel Family Endowment **Katy Knight**

# About Siegel Family Endowment

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# About Siegel

We are a foundation focused on understanding and shaping the impact of technology on society.

We make grants across three primary interest areas:
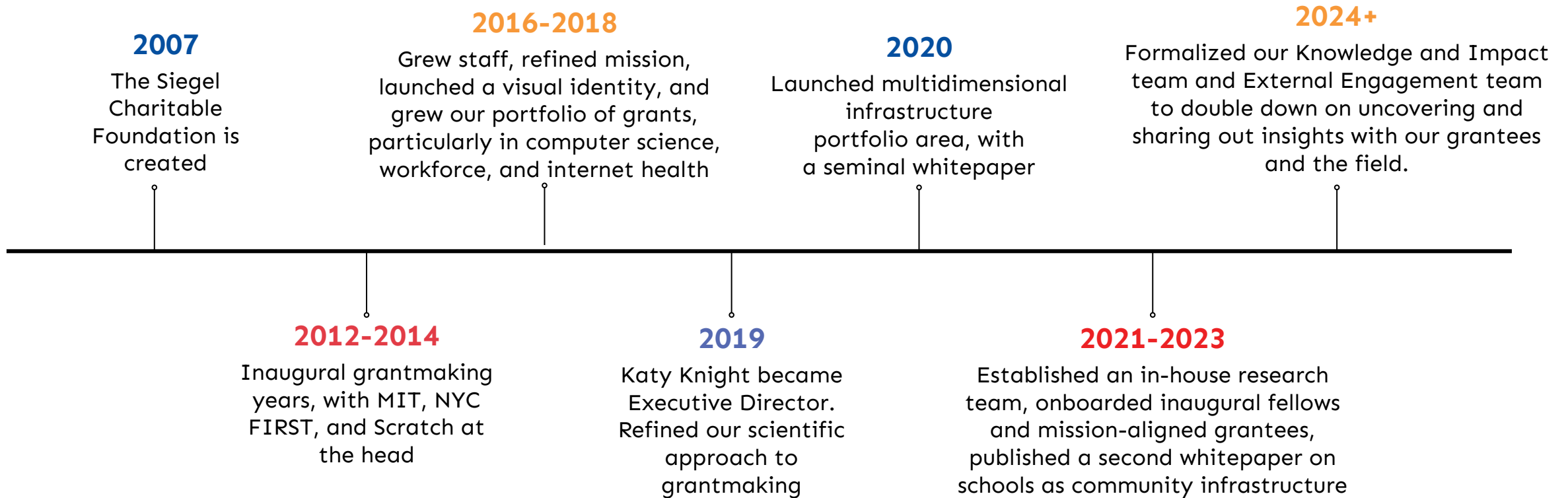
**Learning**          **Workforce**          **Infrastructure**

We take an inquiry-driven approach to grantmaking, rooted in the scientific method.

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# History of Siegel

**2007**
The Siegel Charitable Foundation is created

**2012-2014**
Inaugural grantmaking years, with MIT, NYC FIRST, and Scratch at the head

**2016-2018**
Grew staff, refined mission, launched a visual identity, and grew our portfolio of grants, particularly in computer science, workforce, and internet health

**2019**
Katy Knight became Executive Director. Refined our scientific approach to grantmaking

**2020**
Launched multidimensional infrastructure portfolio area, with a seminal whitepaper

**2021-2023**
Established an in-house research team, onboarded inaugural fellows and mission-aligned grantees, published a second whitepaper on schools as community infrastructure

**2024+**
Formalized our Knowledge and Impact team and External Engagement team to double down on uncovering and sharing out insights with our grantees and the field.

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**Addi Addison**
Cross-Team
Coordinator

**Amanda Ahern**
Senior Research
Associate

**Symone Campbell**
In-House Research
Fellow

**Ali Chin**
Grantmaking
Manager

**Owen Davis**
In-House Research
Fellow

**Jolie De La Rosa**
Operations
Coordinator

**Joshua Elder**
Vice President &
Head of Grantmaking

**John Irons**
Senior Vice
President & Head of
Research

**Katy Knight**
President &
Executive Director

**Laura Maher**
Director

**Maya Padilla**
Grants Coordinator

**Nicole Smoot**
Executive Coordinor

**Madison Snider**
Research Manager

**Jumee Song**
Vice President &
Chief Operating
Officer

**Kyla Kasharian**
Senior Knowledge &
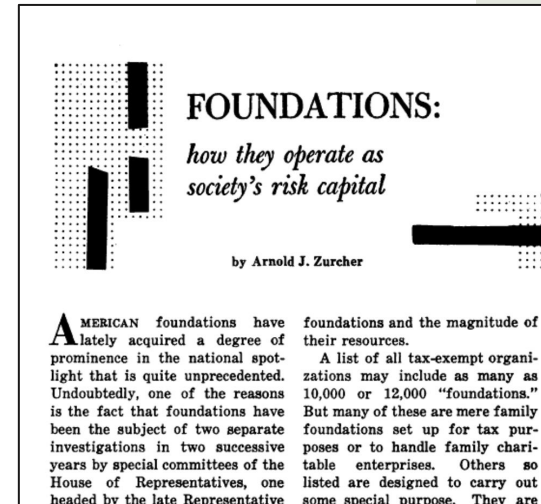Impact Associate

**Evan Trout**
Grantmaking
Manager

**Ellery Wong**
External
Engagement
Associate

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# Philosophy: Society's Risk Capital

**1** R&D investment for the social sector that can fund, test, and prove out new and emerging solutions

**2** Builds on the scholarship of Arnold J. Zurcher and Rob Reich, who argue that foundations are well-suited to "de-risk" solutions for public and private entities and actualize transformative social change

**3** Challenge philanthropic norms to take calculated risks, embrace a growth mindset, fund innovators from non-majority backgrounds, and expand beyond short-term metrics



JUST GIVING

WHY PHILANTHROPY IS FAILING DEMOCRACY AND HOW IT CAN DO BETTER

ROB REICH



FOUNDATIONS: how they operate as society's risk capital

by Arnold J. Zurcher

AMERICAN foundations have lately acquired a degree of prominence in the national spotlight that is quite unprecedented. Undoubtedly, one of the reasons is the fact that foundations have been the subject of two separate investigations in two successive years by special committees of the House of Representatives, one headed by the late Representative foundations and the magnitude of their resources. A list of all tax-exempt organizations may include as many as 10,000 or 12,000 "foundations." But many of these are mere family foundations set up for tax purposes or to handle family charitable enterprises. Others so listed are designed to carry out some special purpose. They are

**Develop and refine inquiry questions**
that help guide the development of our relationships

**Perform landscape analysis**
to better understand the context for our work

**Support work in the field**
that helps us uncover relevant evidence

**Collect and publish findings**
to share with partners in the field

**Convene stakeholders**
to solicit and synthesize feedback

**Apply knowledge and impact**
to refine subsequent rounds of inquiry questions

# Grounding our approach in the scientific method

# Our Guiding Star

**1** **intentional and equitable grantmaking** that elevates grantees, fosters connection, and generates tangible learning outcomes

**2** **codifying, reflecting on, and sharing** what we learn to inform our own strategy, that of our grantees, and that of our peers

**3** **prioritizing strategic collaboration** to strengthen our work and our community

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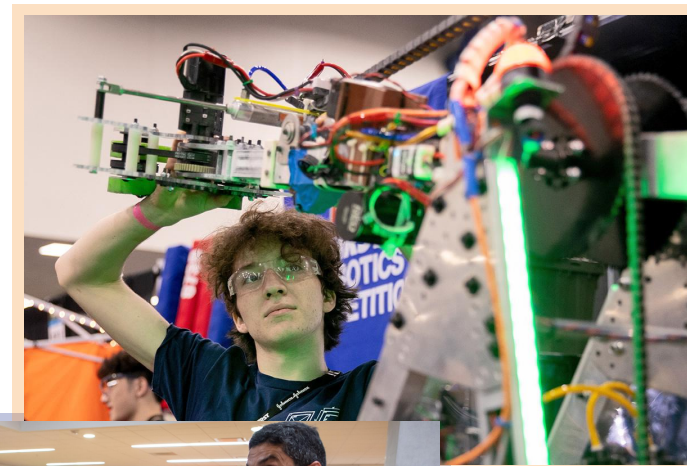
# Values: How We Work

1. **Collaboration**
2. **Risk & Experiment**
3. **Relationship Driven**
4. **Humility & Trust**

# Process: Values in Action

1. **Source & Build Relationships**
2. **Grant & Engage**
3. **Learn & Share**
4. **Reflect & Iterate**

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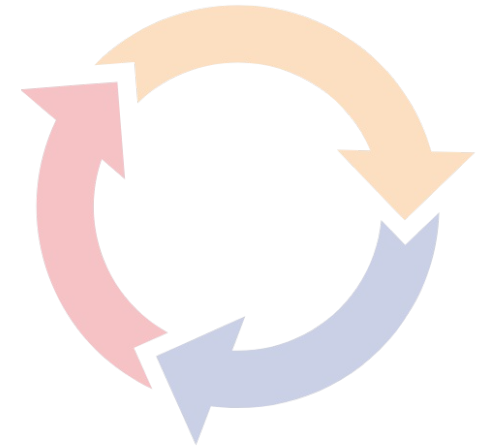
# Our Grantee Partners

**1**

**Community-driven**

They rely on teachers, staff, and local knowledge to build their programs and drive their work

**2**

**Systems entrepreneurs**

They set their sights and orient their programs toward the types of change they'd like to see at the systems level

**3**

**Field builders**

They work in tandem with others, recognizing that long-term change will be achieved by an ecosystem of coordinated players rather than one silver bullet

**4**

**Out-of-the-box thinkers**

We believe philanthropy is society's risk capital, and take risks on big ideas that have the power to transform the system

**\*NOTE:** these represent some, but not all, of the qualities we look for in prospective grantees

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2024 was defined by **intentionality –** in forging strategic partnerships, implementing impactful processes, and amplifying our voice

**1** We established a new **Knowledge and Impact team** to co-design learning, uncover insights with key stakeholders, and pioneer new ways of capturing impact.

**2** We honed our voice, discovering **new ways to highlight successes and learnings**, while **applying systems pressur**e to drive the changes needed in the face of rapid technological transformation

Read our reflections in our 2024 YIR and on our youtube channel

*Siegel Family Endowment*

YEAR IN *Review*

*2024*

→ Flip to the center for a Siegel Mad Lib to spark your thoughts on shaping the future of technology

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Our Interest Areas
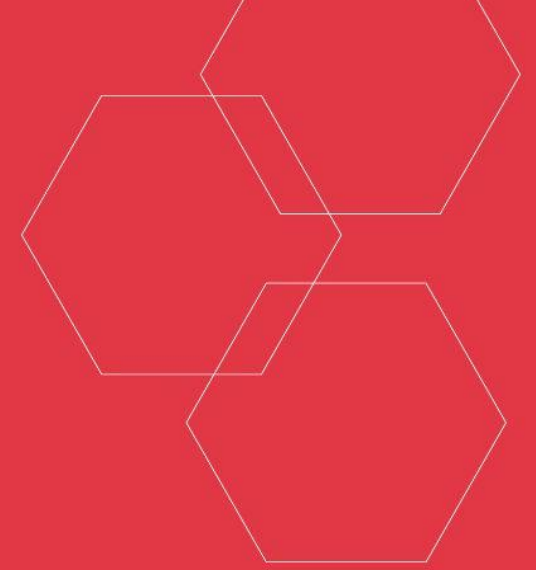
# Learning

**We believe:**

We believe that holistic, multidimensional learning ecosystems—designed to meet the interconnected needs of the whole learner, whole school, and whole community—are essential for fostering lifelong learning, driving equitable outcomes, and preparing individuals to thrive in an evolving world.

**We ask:**

How can we redesign education systems to center students by fostering future-ready learning environments that address the interconnected needs of learners, schools, and communities?

**2025 Priority Inquiry Areas:**

☐ **Learner-Centered Ecosystems,** through testing and scaling future-ready and multidimensional learning environments

☐ **Responsible Ed Tech,** to promote a responsible edtech ecosystem, tool efficacy, user co-development, and educator empowerment

☐ **Advancing the computer and data science movements** as foundational to AI and tech fluency

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# Infrastructure

**We believe:**

Vibrant communities flourish when supported by just and equitable infrastructures, co-created in partnership with those they serve. Without intentional power-sharing and collaboration, inequalities will deepen, eroding our collective potential to build a more inclusive and sustainable future.

**We ask:**

How might we ensure that communities have meaningful opportunities to co-design, guide, and oversee the development, implementation, and maintenance of the infrastructures they rely upon?

**2025 Priority Inquiry Areas:**

☐ **Community in the Digital Age,** prioritizing bold, community-driven solutions that challenge entrenched digital power structures and foster more just, participatory, and resilient digital spaces.

☐ **Public interest technology,** focusing on expanded talent pipelines, support for PIT professionals, and responsible innovation across sectors.

☐ **Civic knowledge infrastructure,** to understand how community institutions function as multidimensional systems within an evolving information landscape.

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# Workforce

**We believe:**

AI and emerging technologies are fundamentally reshaping work and employment, and that excluding workers and communities from their development will exacerbate longstanding inequalities and power imbalances.

**We ask:**

How can we empower workers and communities to shape and leverage emerging technologies to amplify their voices, meet their needs, and ensure workplace innovation fosters equity and prevents harm?

**2025 Priority Inquiry Areas:**

☐ **Research on workplace technology,** especially AI-enabled tools that manage, monitor, direct and evaluate workers—and their impact on pay, job quality, privacy, and information asymmetries

☐ **Pilot programs** that amplify worker voice and advocate for workers' interests in shaping emerging technologies

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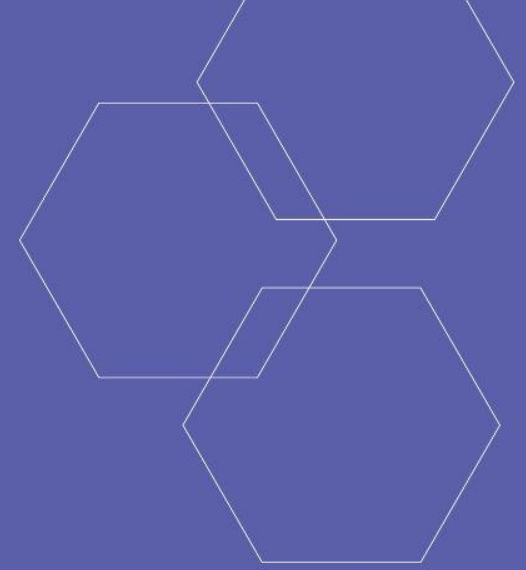
# Our Research

# Our research aligns with our mission: to understand and shape the impact of technology on society

## Approach (3 "N"s)

**Knowledge:** Develop a body of information that advances understanding in or across our fields of study, and can lead to better decision-making both for ourselves and cross-sector stakeholders

**Insights:** Produce research outputs that synthesize existing knowledge, and build new frameworks

**Networks:** Support and contribute to networks of researchers to share ideas, combine and recombine hunches, and work across ideological and disciplinary boundaries

## Key Research Areas

**Intelligence**
How can humans and machines learn, work, and build together?

**Information**
How can we harness data, information, and knowledge for good, and prevent bias and disinformation?

**Design**
How do we design our systems to better serve our collective needs?

**Innovation**
What kinds of ecosystems and tools best support innovative people to build community wealth?

**Decisions**
How do we make better decisions as a society?

**Development**
How do we develop our potential as individuals and as a society?
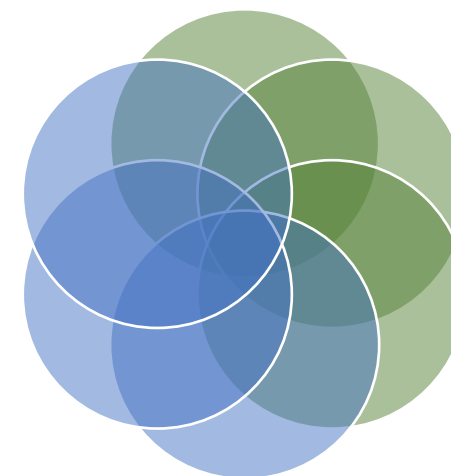
# What we're watching

**1**

**Tech policy**
What democratic values should inform and guide the shaping and implementation of our technology policy?

**2**

**Generative AI (across our inquiry areas)**
Identify and mitigate potential harms in everyday uses, providing guardrails through regulation and policy. Will AI increase or decrease inequality?

**3**

**Big Questions**
What will be the next wave of big questions society needs to tackle? Read the 10 questions we're asking.

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# Research Fellows 2024-2025



**Aidan Toner-Rodgers**
Work of the Future,
Massachusetts Institute
of Technology

**Alexandra Mateescu**
Data & Society

**Ben Zipperer**
Economic Policy
Institute

**Deb Donig**
All Tech is Human

**Emma Zajdela**
Santa Fe Institute

**Júlia Martins Rodrigues**
MEDlab, University of
Colorado Boulder

**Kylan Rutherford**
Center for Social Media
and Politics, New York
University

**Megan E. Rivera**
Washington Center for
Equitable Growth

**Michaela Henley**
#BlackTechFutures
Research Institute

**Nicole Alvarez**
Center for American
Progress

**Pegah Moradi**
Cornell Tech

**Ruchika Joshi**
Center for Democracy
and Technology

**Shanthi Bolla**
Aspen Digital

# Research Advisory Council

**Ben Armstrong,** Executive Director, Work of the Future, Massachusetts Institute of Technology

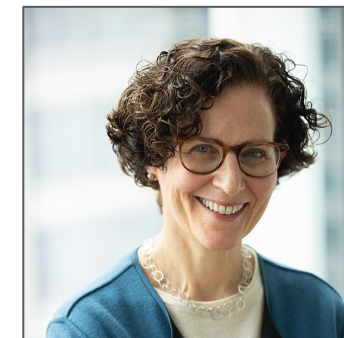**Deborah Estrin,** Professor of Computer Science & Associate Dean for Impact, Cornell Tech
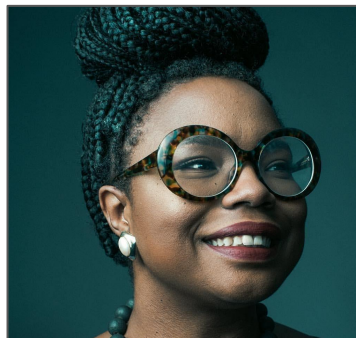
**Fallon Wilson,** Co-Founder & Principal Investigator, #Blacktechfutures Research Institute

**Janet Haven,** Executive Director, Data & Society

**Kathryn Peters,** Democratic Strategist

**Mara Rudman,** Schlesinger Distinguished Professor, Miller Center of Public Affairs

**Prateek Mittal,** Director, Center for Information Technology Policy, Princeton

**Arvind Narayanan,** Professor of Computer Science, Center for Information Technology Policy, Princeton

**Zeve Anderson,** Executive Director, Center for Social Media and Politics, New York University

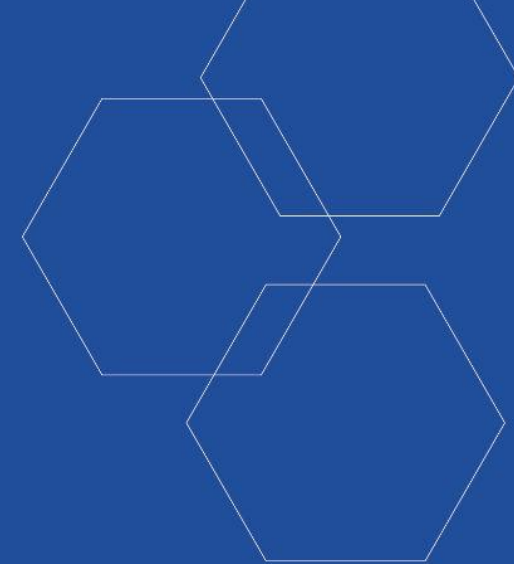**Vivian Schiller,** Executive Director, Aspen Digital, The Aspen Institute

**Shayna Strom,** President, Washington Center for Equitable Growth

**Will Tracy,** Vice President for Applied Complexity, Santa Fe Institute

# Knowledge & Impact

# Monitoring, Evaluation and Assessment
## To Maximize Co-Learning & Insights

### Our Approach

- Rooted in learning questions

- Define success as "what we learned," even from perceived "failure"

- Generate insights usable by others, not just us

- Tailored methodology and evidence to grantee, strategy, and learning questions



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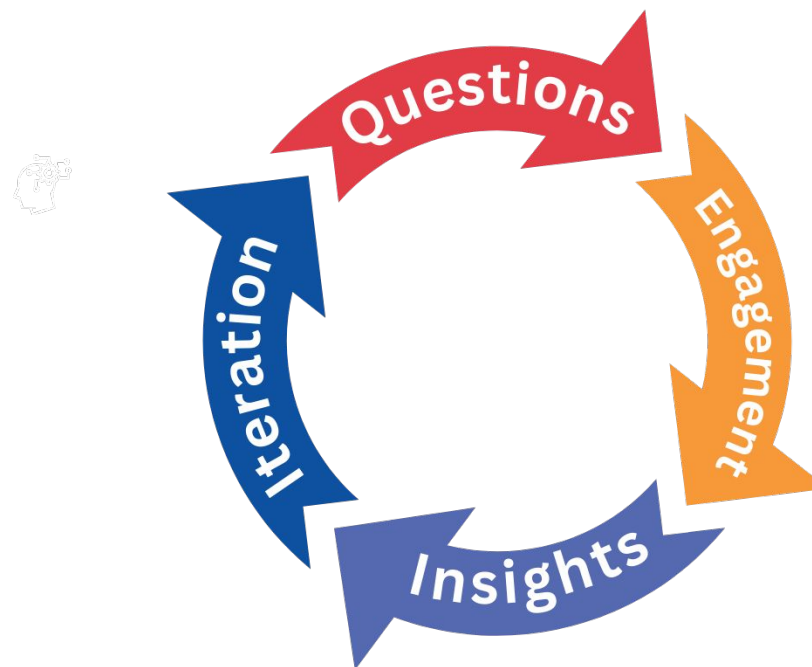
**From co-designing questions...** ▶▶ **To collaborative engagement**

- Well formed questions = tools for social change

- Questions co-developed iteratively in collaboration with grantees

- Prioritizing learning over traditional evaluation

- Collaboratively creating goals and metrics

| Grant Activities & Measurement Chart | | | | |
| --- | --- | --- | --- | --- |
| **Anticipated Goals:** *What would this grant support you in achieving? What is the broader change/impact you hope to bring about?* | **Anticipated Activities:** *Please state the specific activities you would plan to undertake as a result of this grant in order to achieve your goals.* | **Anticipated Metrics:** *What evidence would you collect to show the effectiveness of your activities, and what would be the associated target metrics?* | **Measurement Narrative:** *How would you gather the relevant data? How would this data show the effectiveness of the listed activities and progress towards your goals? What would you do with the information?* | **Connection to Inquiry Focus:** *How would the listed activities and measurements connect to and advance our inquiry focus?* |

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# Engagement ▶▶ Insights

**1**

### What?

What have we learned? What evidence have we gathered? Does it support our hypothesis?

**2**

### So What?

What conclusions can we draw from this? Why does this matter? How does it change our thinking?
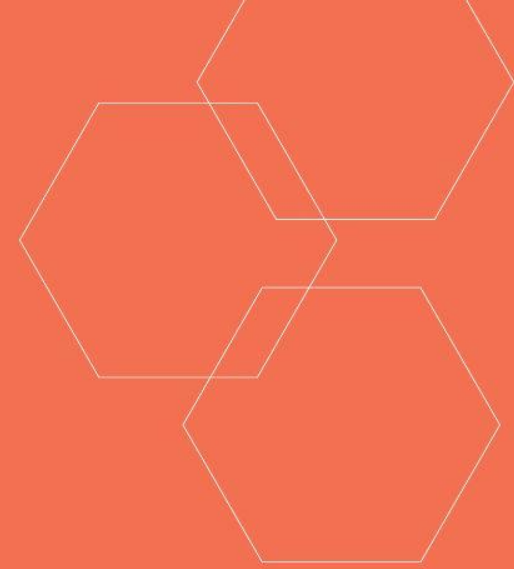
**3**

### Now What?

What will we do with these insights? How will we share this out to the field? Do we need to iterate on our questions or plan?

*Then we start the cycle again!*

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# How We Show Up as Partners

# Our Vision for Effective Philanthropy

**We believe** by prioritizing capacity building, cultivating cultures of inquiry, establishing robust feedback systems, and deepening our understanding of scale and impact, we can strengthen the resilience and effectiveness of the nonprofit ecosystem. Integrating iterative learning and sharing insights openly will further empower the sector to address systemic challenges through collaborative solutions.

## Our Internal Practice

### Grantee Engagement and Process

☐  Reducing burden
☐  Iteration
☐  Relationship building

### Culture

☐  Risk
☐  Staff engagement
☐  Learning and reflection
☐  Feedback

## Our External Approach

### Sector Engagement

☐  Sharing insights
☐  Conferences and convenings
☐  Intentional collaboration

### Areas of Exploration

☐  Scaling and impact
☐  Culture of inquiry
☐  Systems change & thinking

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# You Spoke, We Listened

## What We Heard

☐ Systems change happens very slowly. Funders can maximize their impact by taking a long view.

☐ "Impact" comes in many shapes and forms

☐ Philanthropy can help promote widened access to funding and support for often-overlooked communities

☐ Important breakthroughs occur when funders value grantees' expertise and jointly craft a shared vision

☐ While a relationship-based approach has benefits, pre-grant relationships, renewal conversations, and "standing" can feel opaque

## How we're responding

☐ **Co-designing** impact metrics that are both strategic and realistic

☐ Centering our work around **inquiries** rather than specific programs

☐ Attending **new conferences** and events, especially those led by proximate leaders

☐ Doubling down on **transparency** - before, during and after grant relationships

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# External Engagement

**Mission:** Unlock transformative ideas and evidence-based solutions by strategically connecting them with decision-makers, practitioners, and influencers who can catalyze systemic change

## Our Goals

- **Amplify** the impact of our grants, learnings, field building efforts
- **Create** coherent and compelling narratives across teams
- **Generate** outsized impact for grantees using stories, research, and data
- **Strengthen** and grow our Siegel ecosystems across interest areas

## Our Tools

- ☐ Case Studies
- ☐ Leadership Q&As
- ☐ Conference & meeting activation
- ☐ Grantee-led events
- ☐ Siegel-led events
- ☐ Partnerships
- ☐ Co-drafted op-eds
- ☐ Whitepapers
- ☐ Multimedia
- ☐ ...and more!

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| Date | Location | Conference | Siegel Engagement |
|------|----------|------------|-------------------|
| Feb 16-20 | San Antonio, TX | DS4E Annual Summit | Find Evan there |
| February 19-20 | Atlanta, GA | HBCU EdTech Summit | Find Josh and Symone there |
| February 27-March 1 | Anaheim, CA | Digital Promise AI K12 Deeper Learning Summit | Sponsoring. Attend our session and reception, and inquire about our philanthropy-only half day with Valhalla Foundation |
| March 3-11, 2025 | Austin, TX | SXSW EDU | Find several of our team members there and stop by our annual loungue collaboration with Stanford d.school |
| March 7-15 | Austin, TX | SXSW Interactive | Find several of our team members there and stop by our activation at The Tech We Want's Light House |
| March 17-19 | Myrtle Beach, SC | SETA Spring Conference | Find Josh giving remarks |
| March 17-19 | Baltimore | The Funders Network | Find Evan giving remarks |
| April 6-9 | San Diego | ASU+GSV | Find Katy and Josh there and look out for an invitation to a grantee happy hour |

# Q&A

## ● Contact Us at
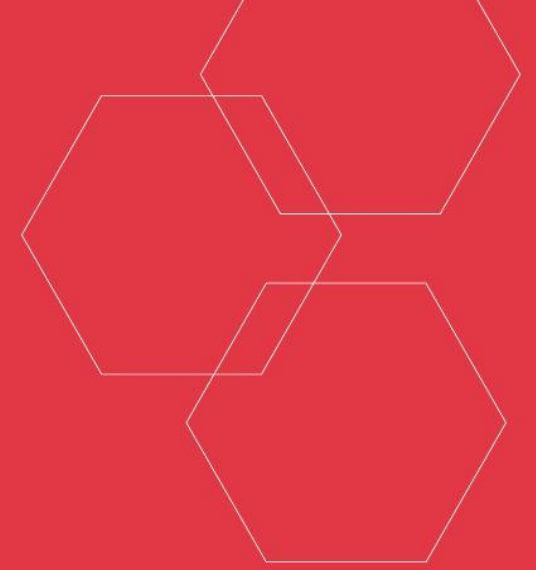
https://www.siegelendowment.org/contact/

## ● Find us at

- **AI Action Summit and Global Forum on AI and Children,** Paris, France, Feb 8-11
- **HBCU EdTech Summit,** Atlanta, GA, Feb 19-20
- **SXSW**, Austin, TX, March 3-6 for EDU; 7-12 for Interactive
- **ASU+GSV**, San Diego, CA, April 6-9, Grantees look out for a HH invitation!
- **Siegel Office Hours & Community Spaces,** for active grantees, invitations via email

## ● Hear from us

- **Siegel Insights Page** https://www.siegelendowment.org/insights/
- **LinkedIn** www.linkedin.com/company/siegel-family-endowment

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# Thank you for joining!