Notes: In a time of information overload we sometimes lose sight of the fact that those who determine what the information tells us, or does not tell us create the stories we believe to be truths.

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> ## Whoever controls information, whoever controls meaning, acquires power.
>
> — Laura Esquivel
>
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Notes: Will we move forward and embrace the complexity and diversity - and some would say promise of what we are now (or could be) - or will we turn back time? Tensions around evaluation continue, with questions about value, validity, rigor, purpose, appropriateness, meaningfulness.

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This Moment

- U.S. democracy is being systematically dismantled
- The realities of historical, systematic, and institutional racism are alive and well
- More foundations, nonprofits, and consultants are engaged in work related to equity
- Evaluation relevance is being challenged
- The U.S. is increasingly diverse and divided

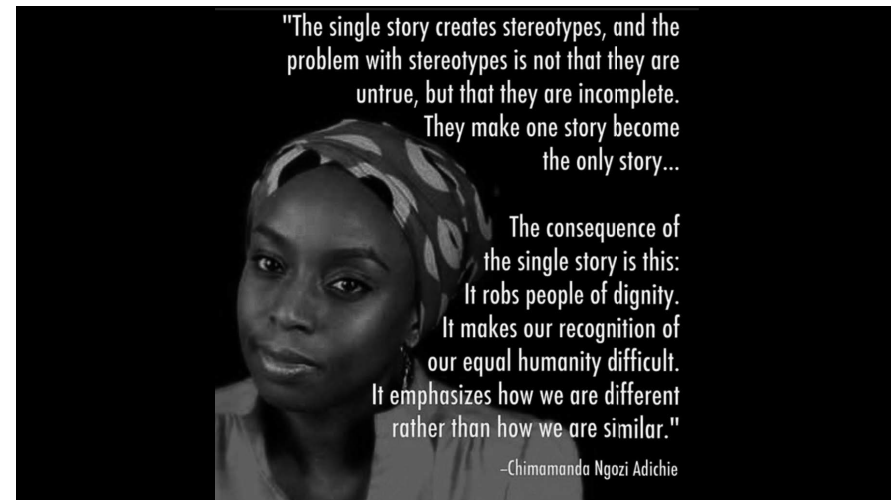©2020 Equitable Evaluation Initiative. All Rights Reserved. 02/2020

Notes: It is important to name that this is Western centric. Race is a social construct and one which the dominant culture (aka white) both created and reinforces to perpetuate its power and control. It is the foundation of the United States (not America which was a settled land of Indigenous peoples). Evaluation is an expression of that mindset. Evaluation and the Framing of Race

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The Reality

RACISM	EVALUATION	THE STAKES
is insidious and permeates what we believe to be *true* and *objective*	• most often reflects the world based in a singular interpretation of history • is anchored in values, experiences and needs of a small group (mostly middle-aged, white, heterosexual cisgender males) • is felt by the "subject" as extractive, reductive and lacking context	are too high for evaluation not to be an instrument of change and in service of a greater equity and liberation

Notes: Chimmanda Ngozie Adichie's 2009 TED Talk captures the limitations and harm of a single story. In the US and often within philanthropy, that story and the data are mutually reinforcing.

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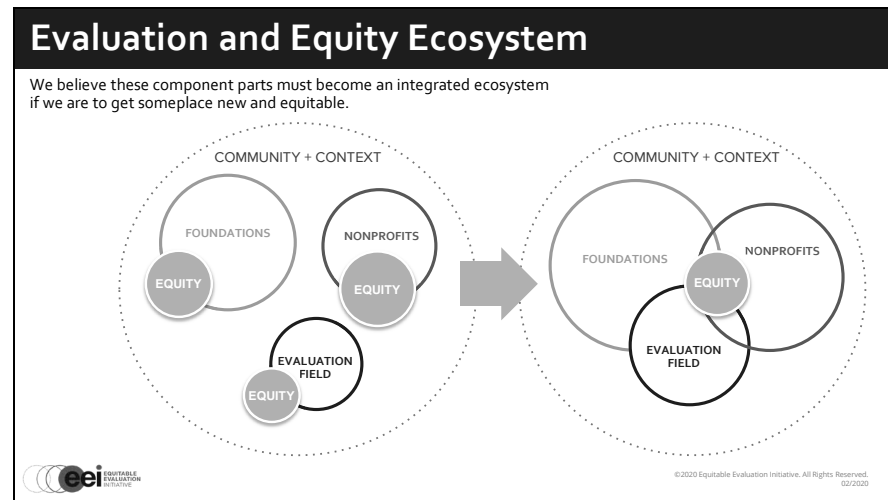_____
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"The single story creates stereotypes, and the problem with stereotypes is not that they are untrue, but that they are incomplete. They make one story become the only story...

The consequence of the single story is this: It robs people of dignity. It makes our recognition of our equal humanity difficult. It emphasizes how we are different rather than how we are similar."

–Chimamanda Ngozi Adichie

Notes: What's the first step? We (EEI) think it is recognizing that there is, in the United States, an ecosystem comprised of various players situated in community and context.

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Evaluation and Equity Ecosystem

We believe these component parts must become an integrated ecosystem if we are to get someplace new and equitable.

COMMUNITY + CONTEXT

FOUNDATIONS

NONPROFITS

EQUITY

EQUITY

EVALUATION FIELD

EQUITY

COMMUNITY + CONTEXT

FOUNDATIONS

NONPROFITS

EQUITY

EVALUATION FIELD

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Notes: When people say equity, they mean different things. How do you define equity? Individually and in your work? In this instance, we mean both means and ends. We believe that access to opportunity is not sufficient, we seek demonstrable evidence of identity (in all its manifestations) to no longer be a determining factor in the human experience.

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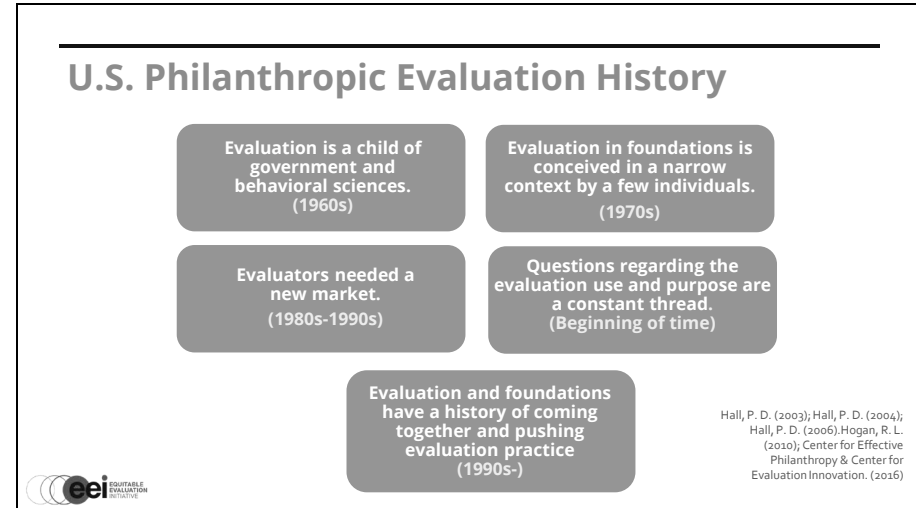_____

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Equity Working Definitions

MEANS

Deep equity means **working** toward **outcomes in ways that model dignity, justice, and love** without re-creating harm in our structures, strategies and working relationships.

ChangeElemental (formerly MAG)

ENDS

Equity is the **absence of avoidable or remediable differences** among groups of people, whether those groups are defined socially, economically, demographically, or geographically.

World Health Organization

Notes: We want to get someplace new. Findings and themes from reports and research are consistent. Evaluation as currently practiced is not serving us well. We - those of us for whom this work (our work) is about creating a world in which all can thrive - have to start anew.
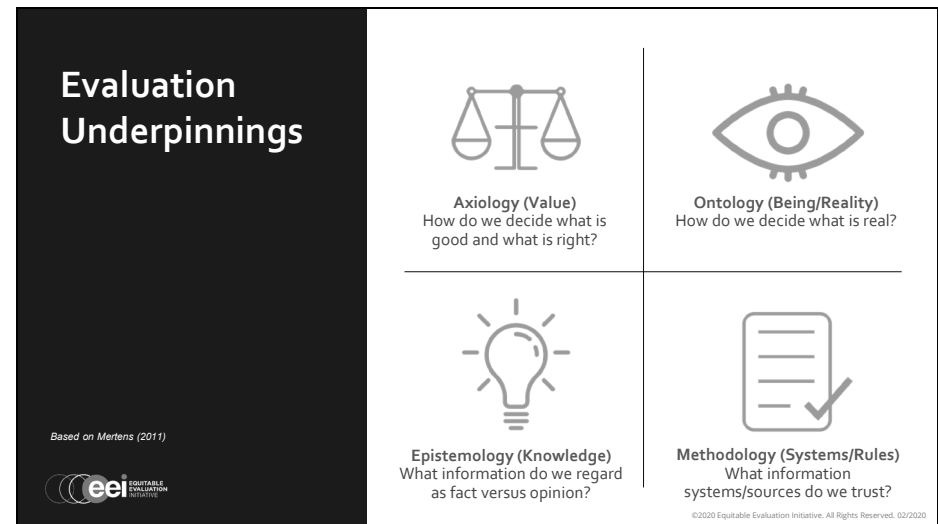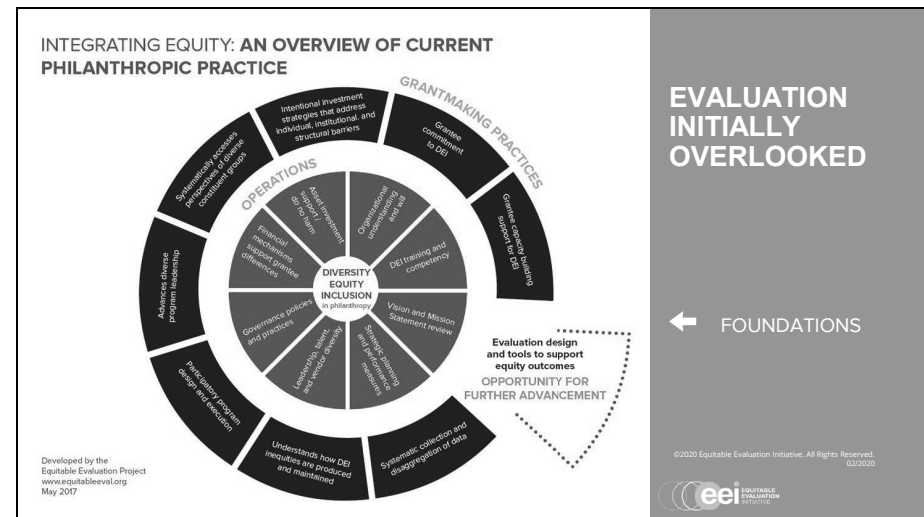
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A Paradigm Shift ...

is what we're really talking about

HEARTS + MINDS

STRUCTURES

BEHAVIORS

Wheel of Change for Transformation, Robert Gass

Notes: In thinking about present day evaluation practices, we must consider the when, why and who that brought evaluation to philanthropy in the beginning. And how this shared history has implications as we evolve evaluation to remain relevant and meaningful. What's Race Got to Do With It? Equity and Philanthropic Evaluation Practice (Dean-Coffey, J., AJE)

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U.S. Philanthropic Evaluation History

Evaluation is a child of government and behavioral sciences.
(1960s)

Evaluation in foundations is conceived in a narrow context by a few individuals.
(1970s)

Evaluators needed a new market.
(1980s-1990s)

Questions regarding the evaluation use and purpose are a constant thread.
(Beginning of time)

Evaluation and foundations have a history of coming together and pushing evaluation practice
(1990s-)

Hall, P. D. (2003); Hall, P. D. (2004); Hall, P. D. (2006).Hogan, R. L. (2010); Center for Effective Philanthropy & Center for Evaluation Innovation. (2016)

Notes: The efforts of D5 Coalition, PolicyLink, Philanthropic Initiative for Racial Equity and the state of the US heightened discussions and the imperative. The 2014 Foundation Review, Racial Equity special edition was the first of its kind, giving a behind- the-curtain view of how foundations were thinking about and grappling with racial equity. In 2017, the EE Project team decided to focus on philanthropy as an entry point, not because the other ecosystem players were unimportant but because we saw an opening in philanthropy and knew how to enter.
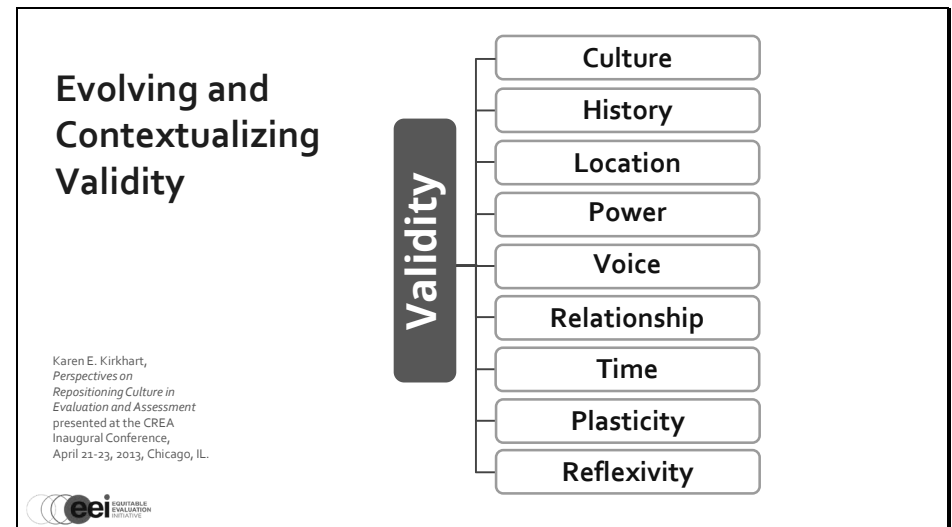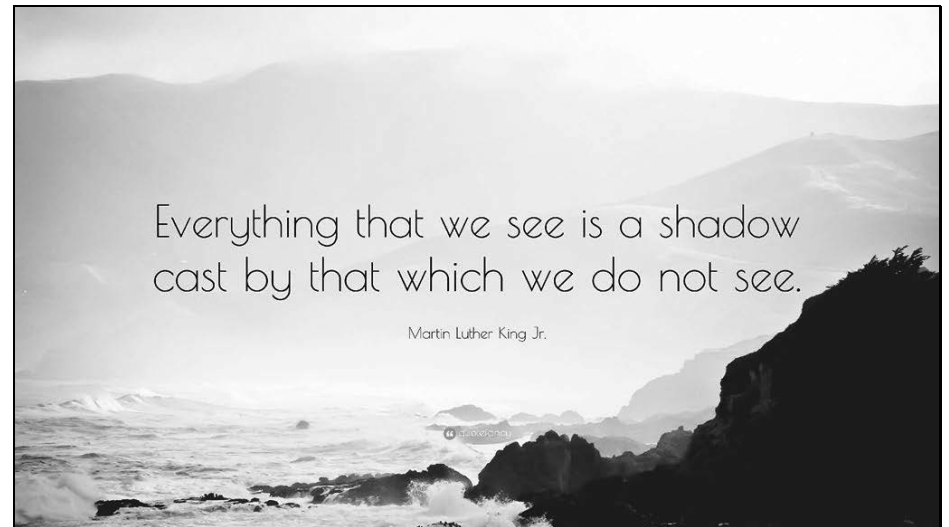
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INTEGRATING EQUITY: **AN OVERVIEW OF CURRENT PHILANTHROPIC PRACTICE**

EVALUATION INITIALLY OVERLOOKED

← FOUNDATIONS

Developed by the
Equitable Evaluation Project
www.equitableeval.org
May 2017

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Notes: When we think about evaluation, we typically jump to methods which is limiting. We must recognize there are a set of beliefs that drive our methodological choices and focus. If we do not understand what drives this tendency, evaluation runs the risk of being at odds with the values and intentions of our efforts.

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Evaluation Underpinnings

Axiology (Value)
How do we decide what is good and what is right?

Ontology (Being/Reality)
How do we decide what is real?

Epistemology (Knowledge)
What information do we regard as fact versus opinion?

Methodology (Systems/Rules)
What information systems/sources do we trust?

Based on Mertens (2011)

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Notes: A reminder that we are humans doing this work and that as such our experiences and identities influence perspectives.

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Everything that we see is a shadow cast by that which we do not see.

Martin Luther King Jr.

Notes: There have been (and will be) challenges to the validity of data that start to waiver from what we believe to be objective. This is another blind way in which we perpetuate a norm that preferences one type of truth, knowing and evidence. Dr. Kirkhart offers this definition of validity which has implications for data analysis and sense making.

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Evolving and Contextualizing Validity

Karen E. Kirkhart,
Perspectives on Repositioning Culture in Evaluation and Assessment
presented at the CREA Inaugural Conference,
April 21-23, 2013, Chicago, IL.

eei EQUITABLE EVALUATION INITIATIVE

Validity
- Culture
- History
- Location
- Power
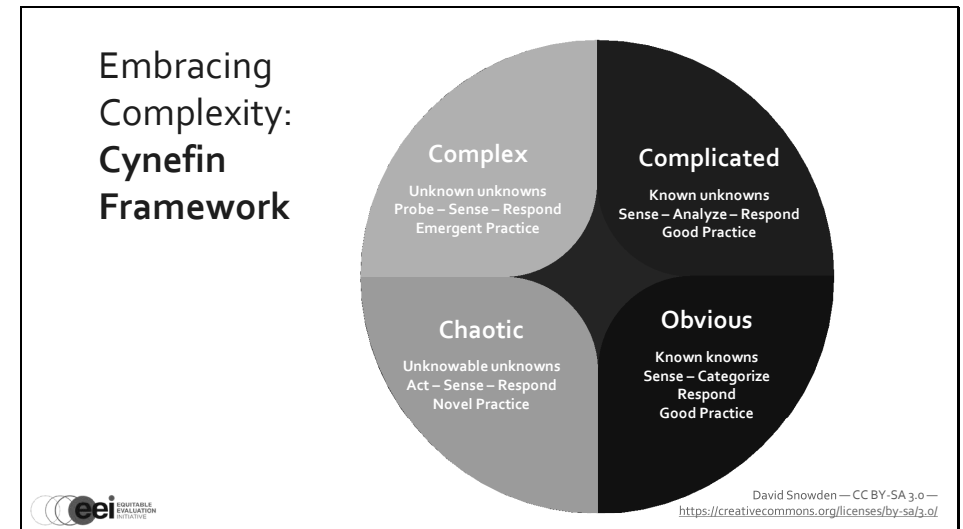- Voice
- Relationship
- Time
- Plasticity
- Reflexivity

Notes: These 4 elements were shared by Jewlya Lynn and Hallie Presklill at the 2015 AEA Conference and a subsequent blog It asks the evaluator to balance the desire for the highest-quality methods and design with the need for the evaluation to have value for the end-user, and for it to be contextually appropriate. From an evaluation purchaser's point of view, it can be a way of articulating upfront expectations or comparing the quality of different approaches. From a programmatic point of view, it can help program leaders and staff have confidence in the evaluation findings or a way of talking about what they are concerned about as they look at results.

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Notes: Our leanings towards predictability and control are no longer serving us in a world of complexity and chaos, evaluative practice must evolve. Link

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A New Definition of Rigor

Quality of the Thinking
- The extent to which the evaluation's design and implementation engages in deep analysis that focuses on patterns, themes, and values (drawing on systems thinking); literature; and looks for outliers that offer different perspectives. seeks alternative explanations and interpretations; is grounded in the research

Credibility and Legitimacy of the Claims
- The extent to which the data is trustworthy, including the confidence in the findings; the transferability of findings to other contexts; the consistency and repeatability of the findings; and the extent to which the findings are shaped by respondents, rather than evaluator bias, motivation, or interests.

Cultural Responsiveness and Context
- The extent to which the evaluation questions, methods, and analysis respect and reflect the stakeholders' values and context, their definitions of success, their experiences and perceptions, and their insights about what is happening.

Quality and Value of the Learning Process
- The extent to which the learning process engages the people who most need the information, in a way that allows for reflection, dialogue, testing assumptions, and asking new questions, directly contributing to making decisions that help improve the process and outcomes.

Hallie Preskill, PhD FSG Jewlya Lynn, Founder PolicySolve
2015 American Evaluation Association annual conference

Embracing Complexity: **Cynefin Framework**

Complex
Unknown unknowns
Probe – Sense – Respond
Emergent Practice

Complicated
Known unknowns
Sense – Analyze – Respond
Good Practice

Chaotic
Unknowable unknowns
Act – Sense – Respond
Novel Practice

Obvious
Known knowns
Sense – Categorize
Respond
Good Practice

David Snowden — CC BY-SA 3.0 —
https://creativecommons.org/licenses/by-sa/3.0/

Notes: Evaluation has already evolved. Here is one example where issues of context, cultural and differing truths and perspectives are encouraged and honored. Culturally Responsive Evaluation (CRE) developed by Drs. Hood and Hopson.

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Evaluation Has Already Evolved

(Based on SPRA, 2005 Commissioning Multicultural Evaluation, A Foundation Resource Guide), *The California Endowment*

	Traditional	Culturally Responsive
Evaluator	Formerly trained/Professional experts	*Grantees, community members seen as experts*
Role of Evaluator	Leader, judge, expert	Facilitator, translator and convener
Design and Planning	Evaluator presents plan for funder approval	Rapport and trust building core to an inclusive planning process *reflecting multiple worldviews.*
Data Collection	Evaluator designs data collection instruments and protocols.	Evaluator designs data collection instruments and protocols with stakeholder involvement. Stakeholders trained in and conduct some d/c methods
Analysis	Evaluator conducts analysis	*Evaluator leads analysis.* Results/meaning derived considering culture and system analysis
Reporting	Written report & briefing to funder	*Disseminated to broader community.*
Use of Findings	Findings express judgment of worth	Findings used to *build capacity of community and community organizations*

Notes: How does the Equitable Evaluation Framework differ (or might it) from Culturally Responsive Evaluation? Be clear, the EE Framework does not replace CRE but can in fact serve as a container for which CRE and other approaches might be situated and ideally utilized more so.

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Continuing Evaluation Evolution

(Based on SPRA, 2005 Commissioning Multicultural Evaluation, A Foundation Resource Guide), *The California Endowment*

	Culturally Responsive	Equitable Evaluation Framework
Evaluator	Grantees, community members seen as experts	Grantees, community members and those most impacted, evaluator, etc.
Role of Evaluator	Facilitator, translator and convener	Partner, learner, facilitator and convener.
Design and Planning	Rapport and trust building core to an inclusive planning process reflecting multiple worldviews.	Informed by role program/effort plays in overall foundation portfolio and reflecting values which support equity. Evaluation questions and overall plan co-created acknowledging culture, context and mindful of time frames needed to build and sustain authentic relationships and understanding within and across groups
Data Collection	Evaluator designs data collection instruments and protocols with stakeholder involvement. Stakeholders trained in and conduct some d/c methods	Co-created inquiry frameworks, data collection tools and protocols grounded in cultural context. Various parties play a role in data collection depending on evaluation questions and methods.
Analysis	Evaluator leads analysis. Results/meaning derived considering culture and system analysis	Analysis and sense making frameworks conceived of at onset are refined now that data is in hand. Multiple analysis methods used including qualitative, quantitative, indigenous, and network, etc.
Reporting	Disseminated to broader community.	Various reports/materials are developed, disseminated , discussed and shared depending on audience, findings of interests and intended use.
Use of Findings	Findings used to build capacity of community and community organizations	Findings used to: 1) inform all matter of decisions and actions including those at the foundation in terms of effectiveness of strategy and understanding of issues/solution, 2) highlight strengths and opportunities that community can leverage; and 3) surface new solutions and roles.

eei EQUITABLE EVALUATION INITIATIVE

Notes: <u>Kaylynn Sullivan TwoTrees</u> is an artist/catalyst/guide who works across mediums, connections and social constructions focused on creating sacred space for deep remembering and reciprocal communication/relationship with nature and the unseen world. This quote speaks to how we "do violence to other's truths when we fail to refine the self, as an open diversity-conscious and expansively learning centered instrument" <u>(Symonett, H, p.111-112)</u>

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Privilege is a learning disability

— Kaylynn Two Trees (2003)

Notes: We learned that there was a group of people and institutions for whom this conversation was not only eye opening but also freeing. The growing interest is a testament to that readiness.
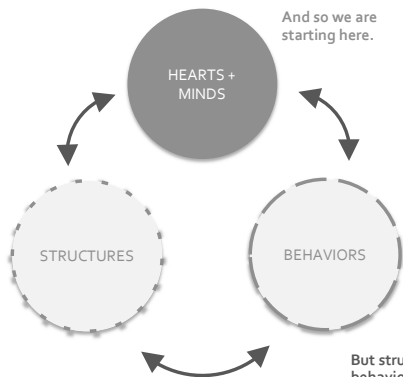
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We've learned that

HEARTS AND MINDS

are primed to advance equity within evaluation practice

And so we are starting here.

HEARTS + MINDS

STRUCTURES

BEHAVIORS

But structures and behaviors – evaluation practice – are not.

Wheel of Change for Transformation, Robert Gass

Notes: The challenge is hard, yes. We have an offering: the Equitable Evaluation Framework, which has main principles as foundational guideposts.

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Equitable Evaluation Framework Principles

Evaluation and evaluative work should be in service of equity:

- Production, consumption, and management of evaluation and evaluative work should hold at its core a responsibility to advance progress towards equity.

Evaluative work should be designed and implemented commensurate with the values underlying equity work:

- Multi-culturally valid.
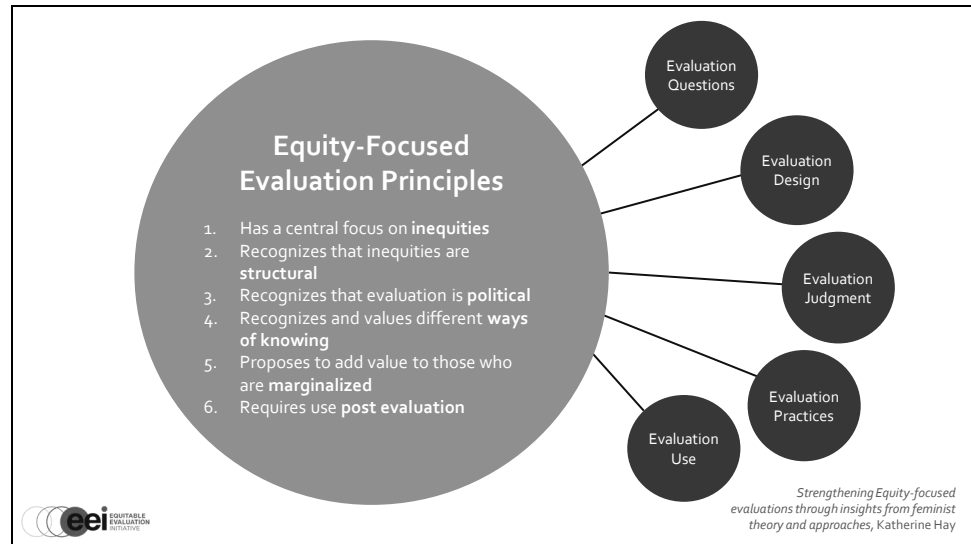- Oriented toward participant ownership.

Evaluative work can and should answer critical questions about the:

- Ways in which historical and structural decisions have contributed to the condition to be addressed.
- Effect on strategy of the underlying systemic drivers of inequity.
- Ways in which cultural context is tangled up in both the structural conditions and the change initiative itself.

(Emerging Principles, Spring 2018)

Notes: This graphic is a useful visual for seeing what should be considered in the phases typically associated with an evaluation as it pertains to understanding inequities. ("Engendering policies and programmes through feminist evaluation: opportunities and insights." Indian Journal of Gender Studies 19/2 (2012); 321-340)

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Equity-Focused Evaluation Principles

1. Has a central focus on **inequities**
2. Recognizes that inequities are **structural**
3. Recognizes that evaluation is **political**
4. Recognizes and values different **ways of knowing**
5. Proposes to add value to those who are **marginalized**
6. Requires use **post evaluation**

- Evaluation Questions
- Evaluation Design
- Evaluation Judgment
- Evaluation Practices
- Evaluation Use

Strengthening Equity-focused evaluations through insights from feminist theory and approaches, Katherine Hay

Notes: Orthodoxies are often invisible, masquerading as "common sense." They are traditional/tightly held beliefs that can undermine Equitable Evaluation Framework principles. They are believed to be foundational and affect the undercurrents of organizational culture (see more, p.2) This set of orthodoxies surfaced as part of the research conducted in the EE Project 2016-2017.
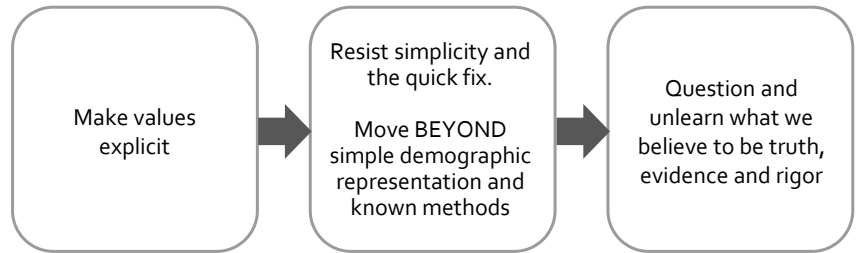
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Orthodoxies (Foundation - emerging 2018)

The foundation defines what success looks like.	Grantees and strategies are the evaluand, but not the foundation.	The foundation is the primary user of evaluation.	Evaluations should provide generalizable lessons.
Evaluators should be selected based on credentials that reflect traditional notions of expertise.	Evaluators are the experts and final arbiters, grantees are the beneficiaries	Credible evidence comes from quantitative data and experimental research.	Evaluators are objective.
Evaluation funding primarily goes to data collection, analysis, and reporting.	Time frames/short term outcomes as indicators of good stewardship.	Evaluation in service of foundation brand.	Trust / relationships come from doing the work, but are not the starting point.

Notes: This requires a way of being and thinking that is grounded in a moral imperative (equity as an end not only a means) and embraces the complexity of identities. It will challenge ideas of validity and rigor, which codify bias and ways of knowing, truth and evidence as objectivity.

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Change is Hard

Make values explicit → Resist simplicity and the quick fix. Move BEYOND simple demographic representation and known methods → Question and unlearn what we believe to be truth, evidence and rigor

Notes: So where to start? At the beginning, the frame. Whose frame? Developed when? From what perspective? Grounded in what world view? Maria Rosario Jackson's expertise is in comprehensive community revitalization, systems change, arts and culture in communities and dynamics of race and ethnicity.

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> The real work starts with questioning the frame.
>
> - Maria Rosario Jackson (2018)

Notes: This framing (or reframing) has been well received by foundations and evaluators/consultants in the philanthropic ecosystem. There is growing acknowledgement of the role that race and racism has played (and does play) in the conceptualization of evaluation and its practice. If we want to get somewhere new, we have to be and do something different.

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The Opportunity
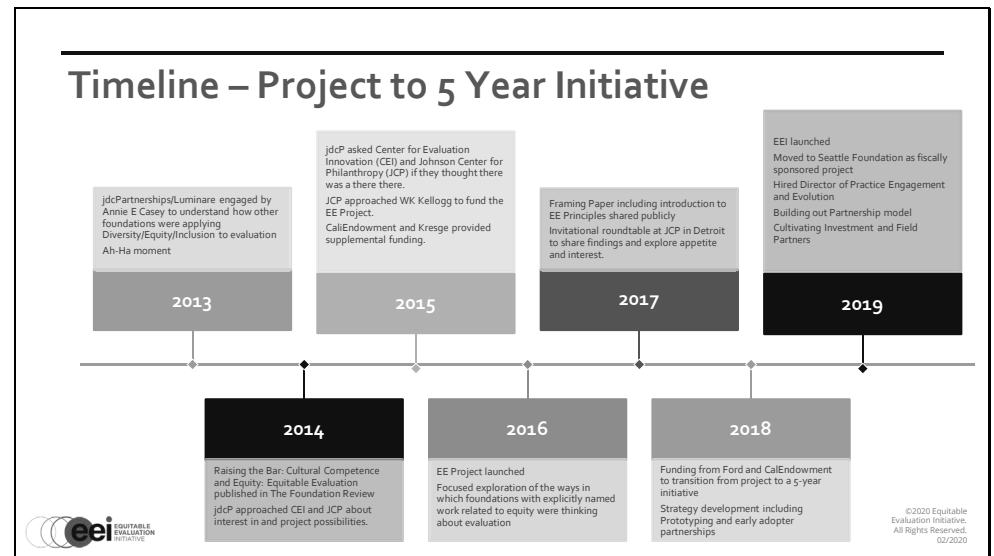
EVOLVE — notions of rigor and relevance as they pertain to evaluation's purpose and usefulness.

EXAMINE — the "fit" of existing evaluation approaches to the principles and values of equity-focused philanthropy and nonprofit efforts.

UNDERSTAND — better what it takes to build the foundation/evaluator/non profit capacity, will and wherewithal to engage in equitable evaluation.

Notes: This is a history of the evolution of the Equitable Evaluation Framework, noting that the ideas and frames that inform it predate both EE Project and the EE Initiative.

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Timeline – Project to 5 Year Initiative

2013 — jdcPartnerships/Luminare engaged by Annie E Casey to understand how other foundations were applying Diversity/Equity/Inclusion to evaluation. Ah-Ha moment

2015 — jdcP asked Center for Evaluation Innovation (CEI) and Johnson Center for Philanthropy (JCP) if they thought there was a there there. JCP approached WK Kellogg to fund the EE Project. CaliEndowment and Kresge provided supplemental funding.

2017 — Framing Paper including introduction to EE Principles shared publicly. Invitational roundtable at JCP in Detroit to share findings and explore appetite and interest.

2019 — EEI launched. Moved to Seattle Foundation as fiscally sponsored project. Hired Director of Practice Engagement and Evolution. Building out Partnership model. Cultivating Investment and Field Partners

2014 — Raising the Bar: Cultural Competence and Equity: Equitable Evaluation published in The Foundation Review. jdcP approached CEI and JCP about interest in and project possibilities.

2016 — EE Project launched. Focused exploration of the ways in which foundations with explicitly named work related to equity were thinking about evaluation

2018 — Funding from Ford and CalEndowment to transition from project to a 5-year initiative. Strategy development including Prototyping and early adopter partnerships

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Notes: EEI has as part of its community a set of Investment Partners that span the US, foundation types, foundation focus and age. They have proven to be champions and thought partners behind and in front of the scenes.

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Our Investment Partners

the David Lucile & Packard FOUNDATION

The James Irvine Foundation

SEATTLE FOUNDATION

CONRAD N. Hilton FOUNDATION

MacArthur Foundation

The California Endowment

FORD FOUNDATION

Robert Wood Johnson Foundation

S. D. BECHTEL, JR. FOUNDATION
STEPHEN BECHTEL FUND

TALENT CITIZEN

McKNIGHT FOUNDATION

WALTON FAMILY FOUNDATION

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Notes: This is an overview of the current philanthropic ecosystem actors engaged with EEI as Practice Partners. Those in italics are ones with whom EEI is exploring what next.

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Fall/Winter 2019 Emerging Practice Partners

- **Foundations:** AECF, Oregon, Colorado Health Foundation, CalEndowment, Missouri Foundation for Health, Kresge, Vancouver, Nellie Mae, McKnight, Kresge, *Michigan Health Endowment Fund, MW Collaboratory Participants.*

- **Philanthropic Support Organizations**: Johnson Center on Philanthropy, Grantmakers for Effective Organizations, Center for Evaluation Innovation, PEAK Grantmaking , Funders Together to End Homelessness, Philanthropy Northwest, *Associations for Advancing Equitable Evaluation Principles*

- **Consultants**: *TCC Group, Vantage Evaluation, Engage R&D, CEI, LFA Group, Abt Associates, ORS Impact, SparkPolicy Institute, Colorado Collaboratory 2, Mathematica*

- **Academia** (*Professors from): UConn, Rochester, Tufts, University of Indiana, Portland State University, Penn*

Notes: What we have before us is an evolutionary opening…An invitation. This is a unique moment in time to bring into alignment evaluation with the intentions of many of us who seek to transform the world in which we live.

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The Invitation

Reimagine the purpose and practice of evaluation **to reflect the values that drive** philanthropy and the nonprofits and their intentions **and embrace 21st Century definitions of validity and complexity.**

Notes: Starting with hearts and minds is key - primed toward equipping for transformation, and adoption of the Equitable Evaluation Framework principles.

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Bringing it all Together
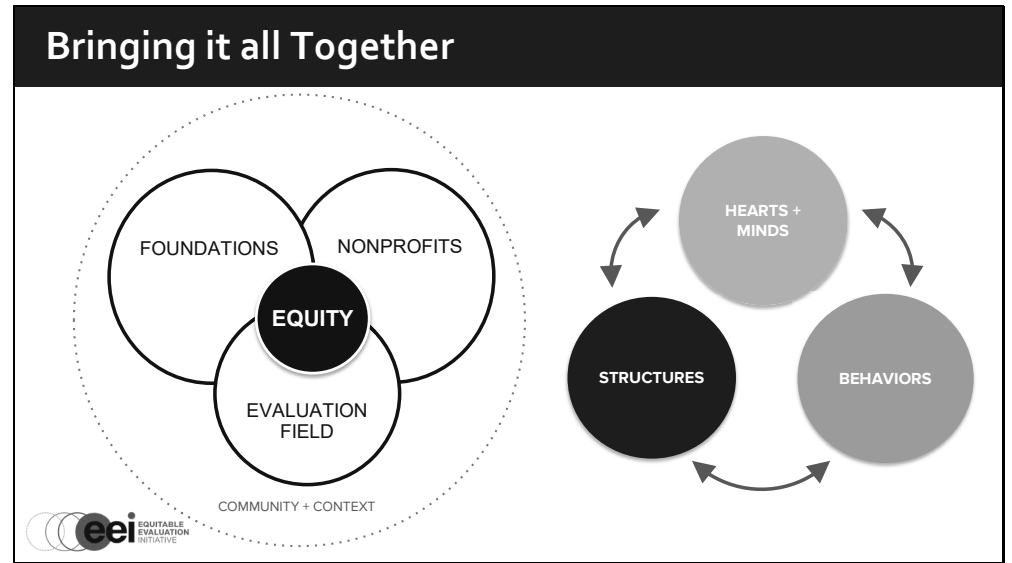
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info@equitableeval.org