
**Whoever controls information,
whoever controls meaning,
acquires power.**

— Laura Esquivel

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

The Reality

RACISM

is insidious and permeates what we believe to be *true* and *objective*

EVALUATION

- 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

THE STAKES

are too high for evaluation not to be an instrument of change and in service of a greater equity and liberation

"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...

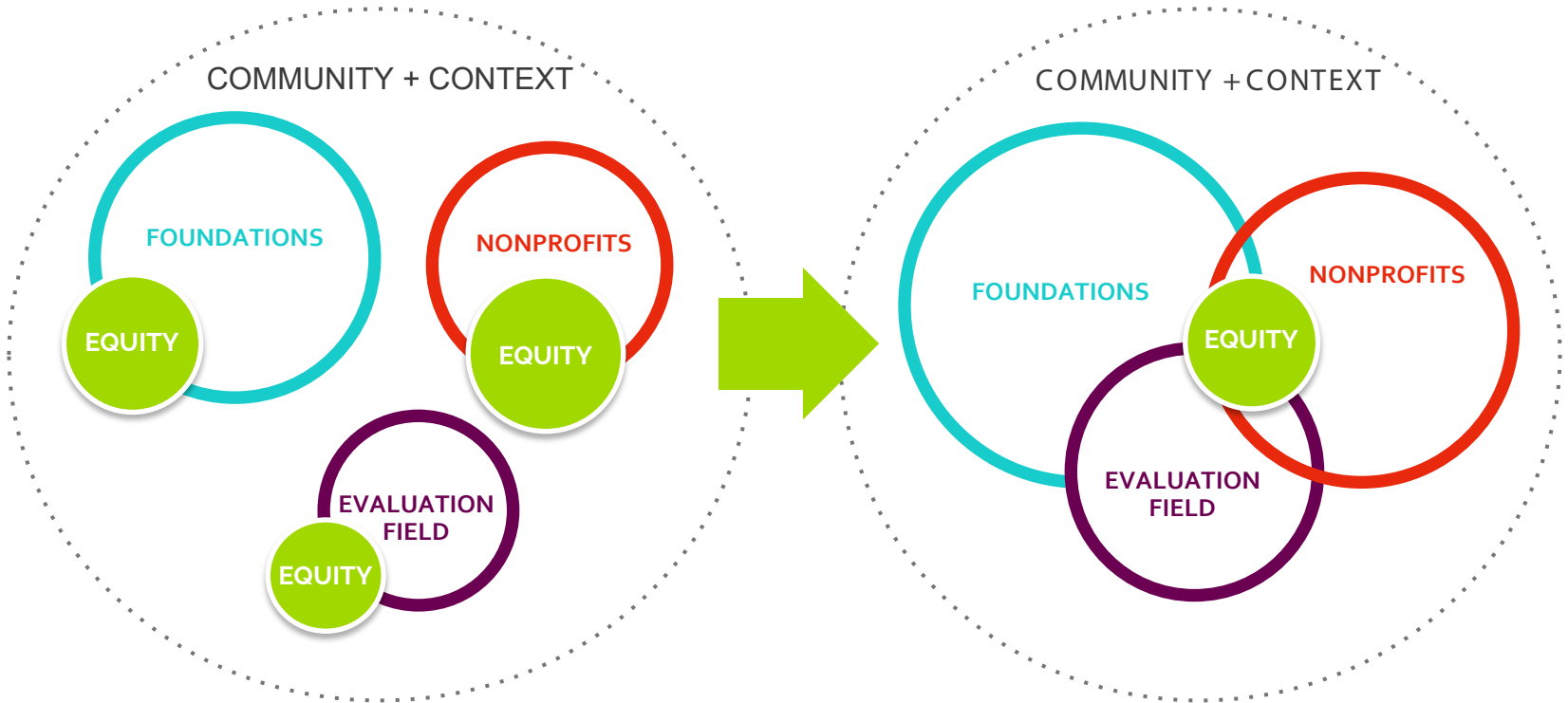


The consequence of the single story is this: It robs people of dignity. It makes our recognition of our equal humanity difficult. It emphasizes how we are different rather than how we are similar."

-Chimamanda Ngozi Adichie

Evaluation and Equity Ecosystem

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



Equity Working Definitions

MEANS

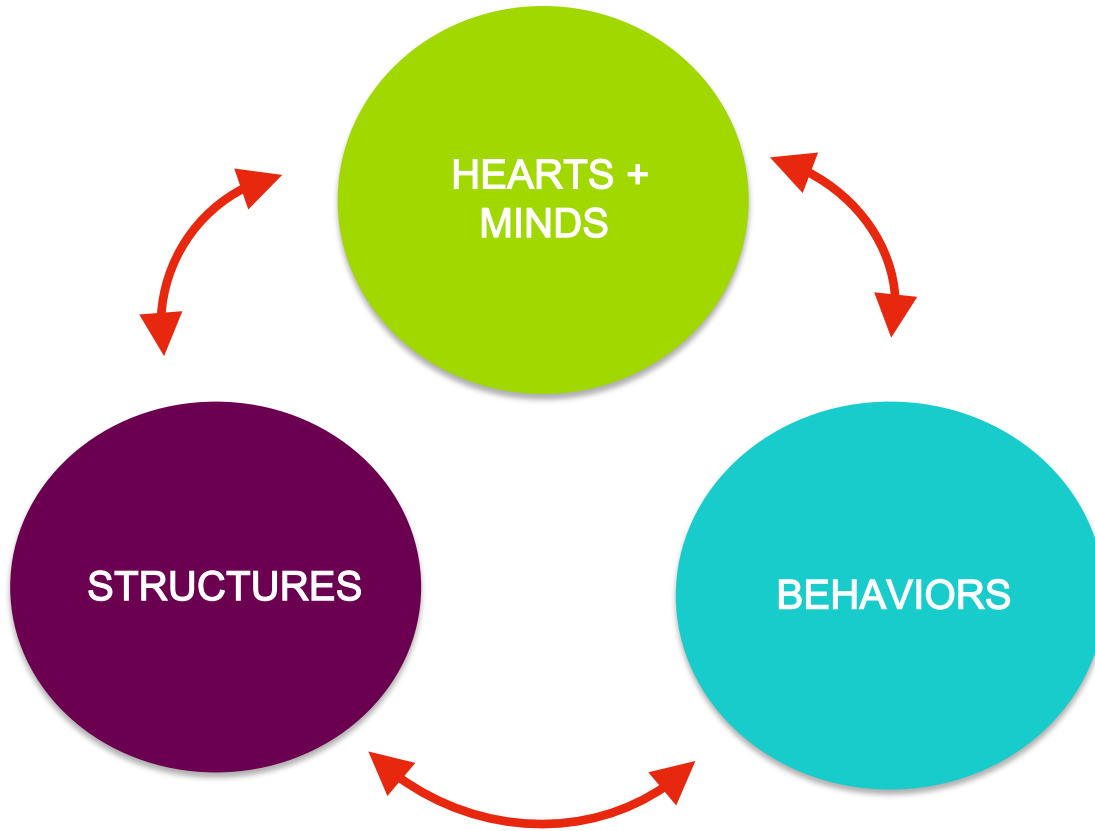
Deep equity means **working** toward **outcomes in ways that model dignity, justice, and love without re-creating harm in our structures, strategies and working relationships.**

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



A Paradigm Shift ...

is what we're really talking about

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)

INTEGRATING EQUITY: AN OVERVIEW OF CURRENT PHILANTHROPIC PRACTICE



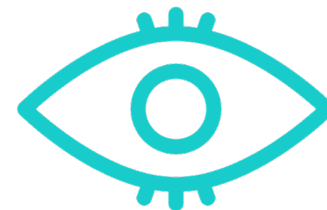
EVALUATION INITIALLY OVERLOOKED

FOUNDATIONS

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)



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

Martin Luther King Jr.

“ quotezofancy

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.

Validity



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.

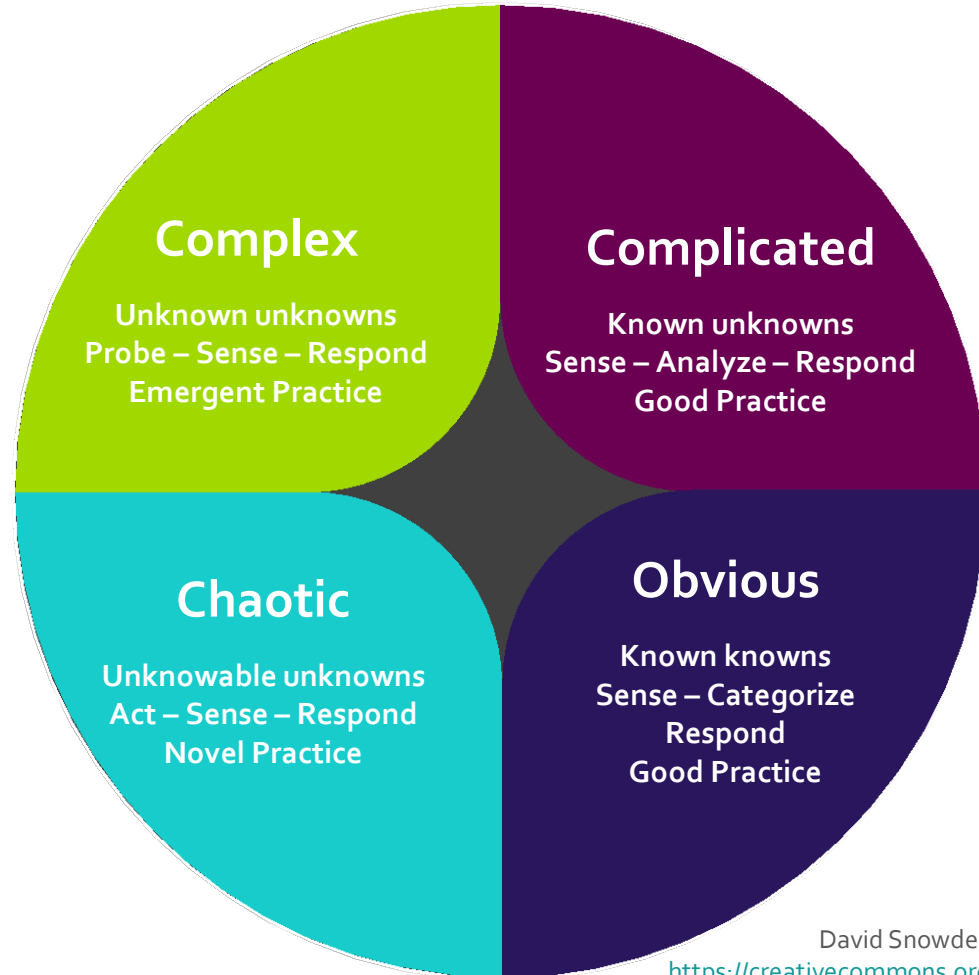
Cultural Responsiveness and Context

- 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.

Embracing Complexity: Cynefin Framework



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	<i>Grantees, community members seen as experts</i>
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 <i>reflecting multiple worldviews.</i>
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	<i>Evaluator leads analysis.</i> Results/meaning derived considering culture and system analysis
Reporting	Written report & briefing to funder	<i>Disseminated to broader community.</i>
Use of Findings	Findings express judgment of worth	Findings used to <i>build capacity of community and community organizations</i>

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.

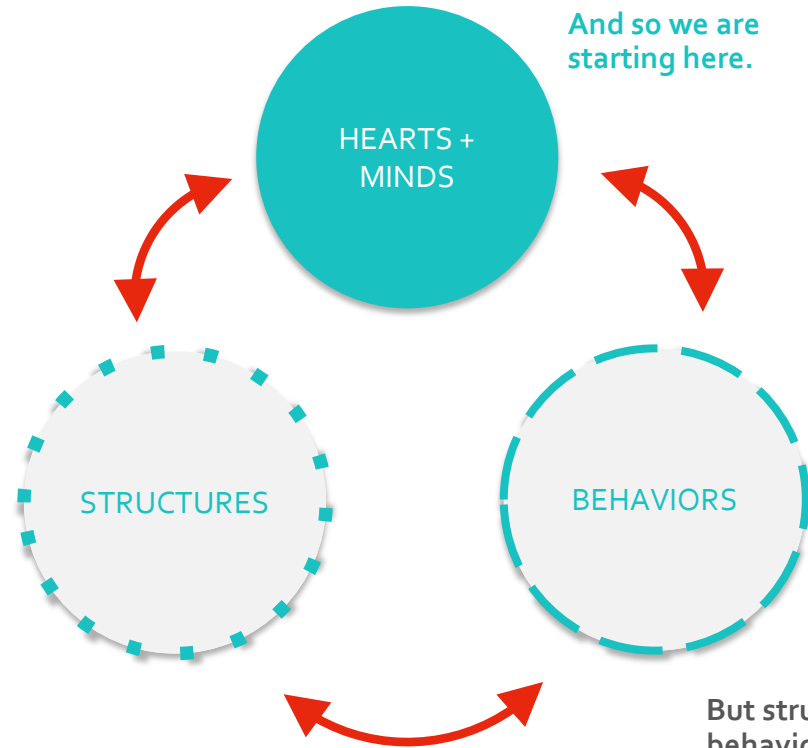
Privilege is a learning disability

— Kaylynn Two Trees (2003)

We've learned that

HEARTS AND MINDS

are primed to advance equity within evaluation practice



But structures and behaviors – evaluation practice – are not.

Wheel of Change for Transformation, Robert Gass

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)

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

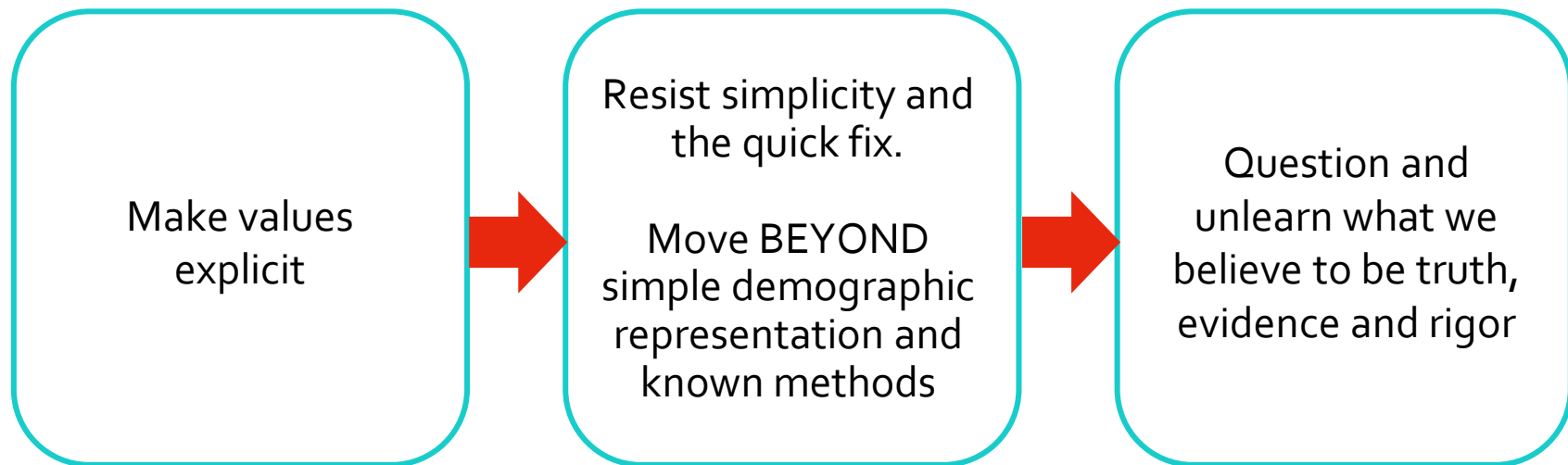
Evaluation Use

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

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.

Change is Hard



The real work starts with
questioning the frame.

- Maria Rosario Jackson (2018)

The Opportunity

EVOLVE

notions of rigor and relevance as they pertain to evaluation's purpose and usefulness.

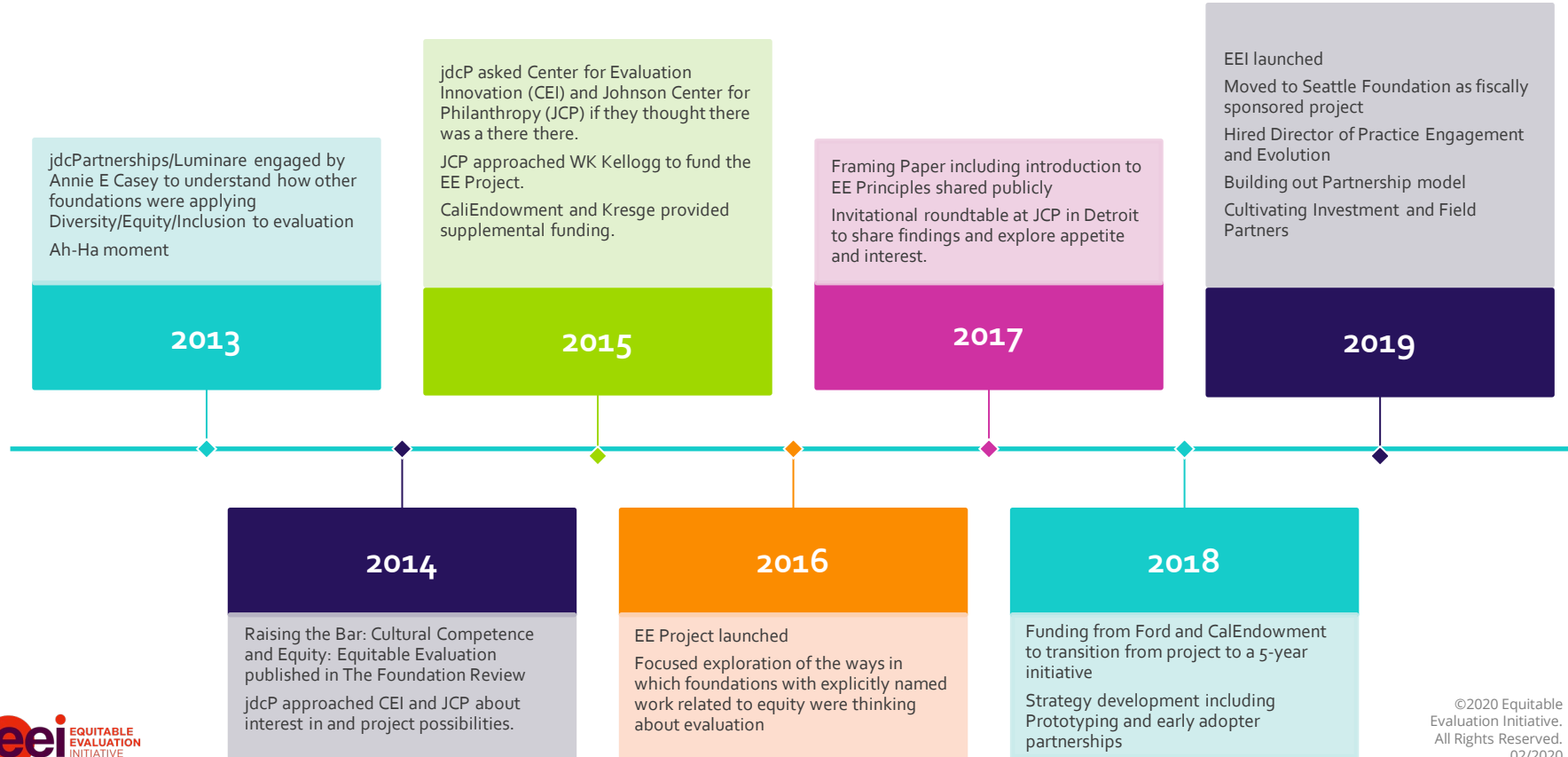
EXAMINE

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.

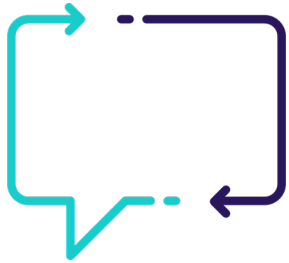
Timeline – Project to 5 Year Initiative



Our Investment Partners



Fall/Winter 2019 Emerging Practice Partners

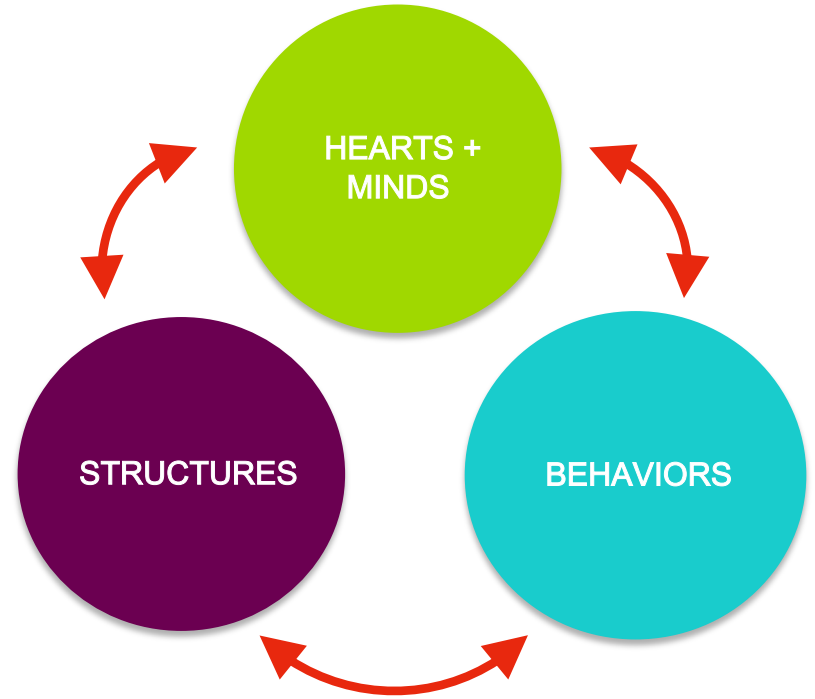
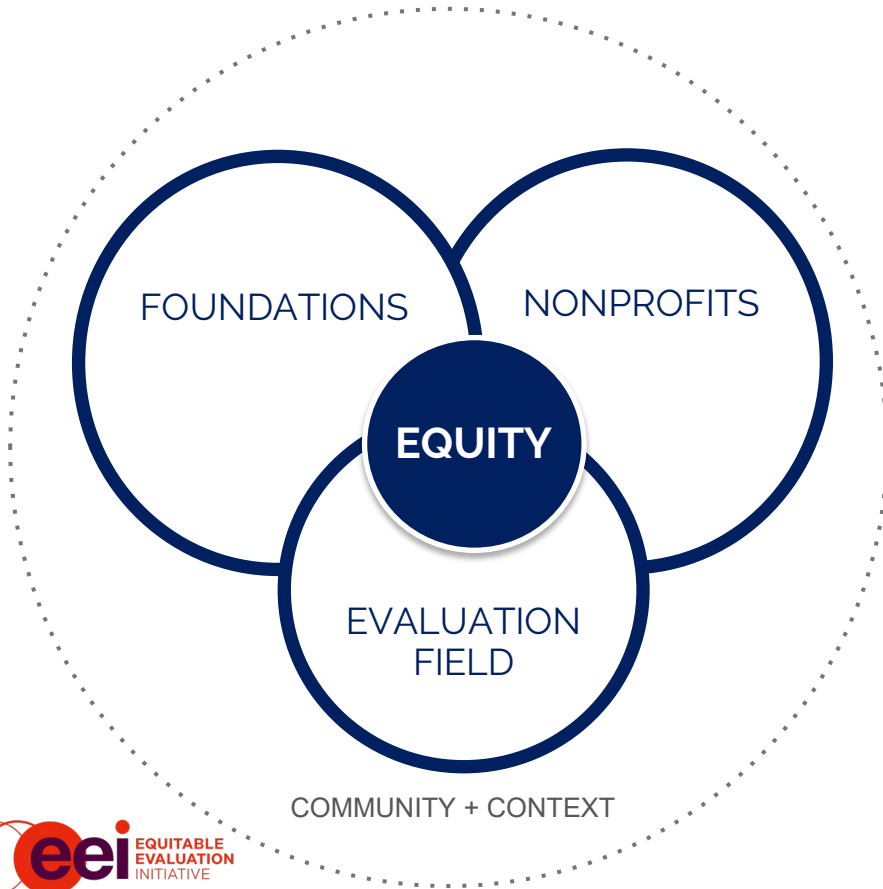


- **Foundations:** AECF, Oregon, Colorado Health Foundation, CalEndowment, Missouri Foundation for Health, Kresge, Vancouver, Nellie Mae, McKnight, Kresge, Michigan Health Endowment Fund, MW Collaboratory Participants.
- **Philanthropic Support Organizations:** Johnson Center on Philanthropy, Grantmakers 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

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.**

Bringing it all Together



**SORRY FOR
THE INCONVENIENCE**

**WE ARE TRYING
TO CHANGE THE WORLD**



Join Us

www.equitableeval.org/

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@equitableeval

info@equitableeval.org