



JOHNSON CENTER

AT GRAND VALLEY STATE UNIVERSITY

Rethinking Foundation Evaluation Practices: Equitable Evaluation

CONNECTICUT COUNCIL FOR PHILANTHROPY

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Why We Need to Rethink Evaluation

- The Rise of Strategic Philanthropy
- A Focus on Systems Change
- This Moment in History

Brest (2013)



Strategic Philanthropy and Easy Fixes

Simple problems

Follows a formula - can reliably predict cost, timeline, end result

Complicated problem

May take many attempts, but once discovered, can be repeated with predictable results

Kania, Kramer, Russell, 2014



The Real Challenge for Strategy and Evaluation – Systems Change

Complex problem

Dynamic, nonlinear, counter-intuitive

Multiple interdependent factors

History and context are critical

Momentum can shift in unpredictable ways

Successful programs not reliably replicated in other places



Kania, Kramer, Russell, 2014



Defining Equity

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." *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





INTEGRATING EQUITY: AN OVERVIEW OF CURRENT PHILANTHROPIC PRACTICE

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





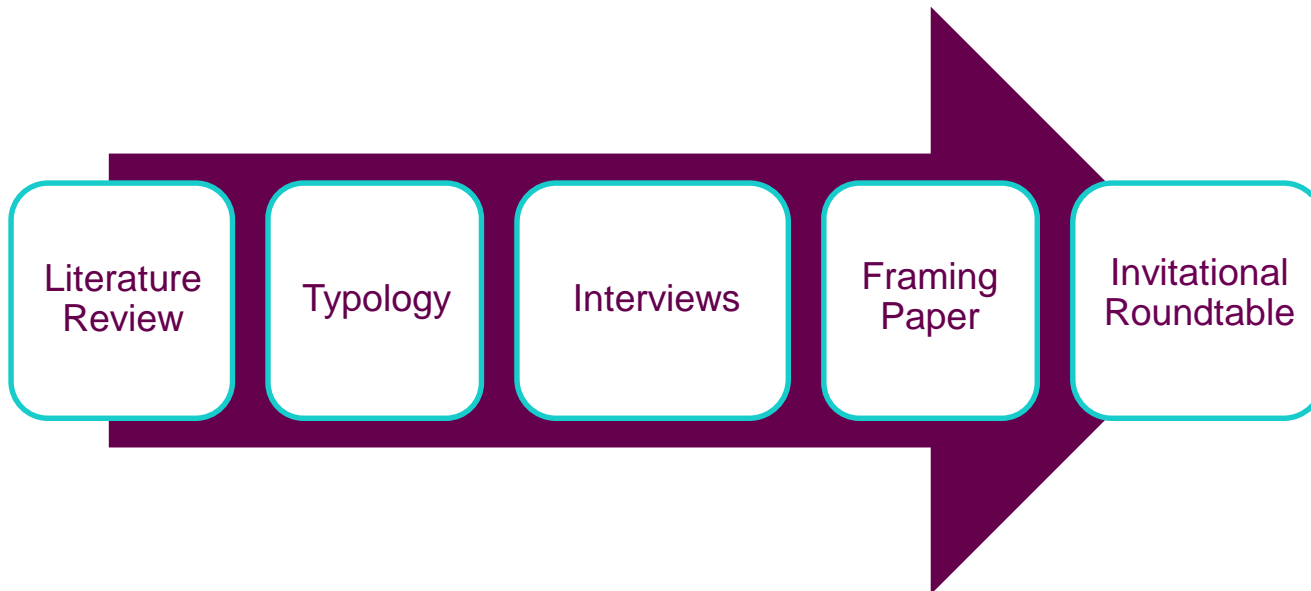
THE EE PROJECT (2016-2017)

THE TEAM:

- Luminare Group
- Johnson Center for Philanthropy
- Center for Evaluation Innovation

THE FUNDERS:

- W.K. Kellogg Foundation
- The Kresge Foundation
- The California Endowment





EQUITY PROGRAMMING TYPOLOGY (working May 2017)

	Approach	Description
Structural Integration of Equity Frame	Institutionalized-equity Approach	Builds institutional structure from outset or restructures organization to consider equity in all policies, practices, procedures internally and externally
	Equity-add-on Approach	Engages in post-hoc decisions and actions to graft equity considerations and approaches onto existing (usually non-equity supporting) institutional framework.
Investment Reflecting Equity Frame	Institutionalized-Equity Approach*	Funding recognizes the problems of structural racism and systemic structural barriers with a focus on transformative, systems level change.
	Cultural-matching Approach	Focuses on developing, implementing, and disseminating approaches that match, reflect, integrate historical, cultural, and social needs and desires of populations of color
	Missionary Approach	Funds needed services in traditional ways, targeted specifically to people of color, usually delivered by people of different ethnicity than population served
	Diversity Approach	Includes people of color in defined aspects of funding decisions.
	Equality “Raise-all-boats” Approach	Focuses on improving systems of care for improved outcomes, with the expectation that improved systems will automatically impact all population groups
Equity Frame Not Active	Selective-equity Approach	Chooses selectively which population or inequity to address as sole programmatic focus, e.g, income inequality but not racial inequities; Latinas but not African Americans
	Concerned, Non-action Approach	Knows that inequities exist, but does not know how to incorporate into strategic actions.
	Low-awareness Approach	Conducts professional work in absence of recognition or consideration of need to address inequities





AN OFFERING: EQUITABLE EVALUATION

(Emerging Principles and Orthodoxies, Spring 2018)

Evaluation work is in service of and contributes to equity.

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

Evaluative work can and should answer critical questions about the:

- Effect of a strategy on different populations
- Effect of a strategy on the underlying systemic drivers of inequity
- Ways in which history and cultural context are tangled up in the structural conditions and the change initiative itself.

Evaluative work should be designed & implemented in a way that is commensurate with the values underlying equity work:

- Multi-culturally valid
- Oriented toward participant ownership

FOUNDATION ORTHODOXIES

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.	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.	





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

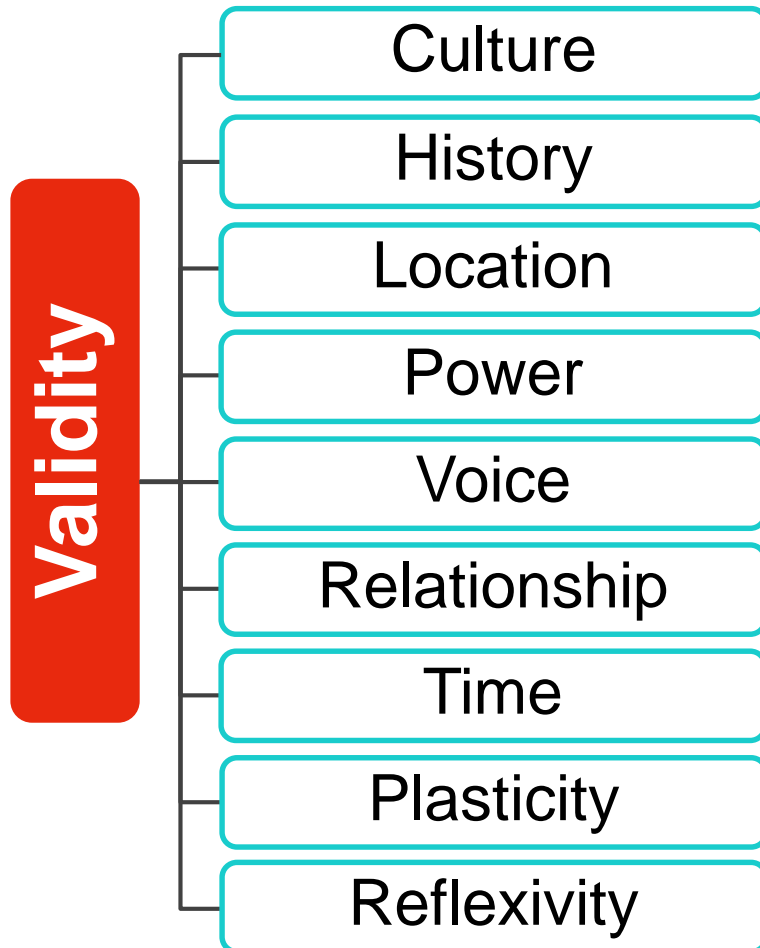
Evaluation
Questions

Evaluation
Design

Evaluation
Judgment

Evaluation
Practices

Evaluation
Use



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.





WHAT MAKES EE DIFFERENT

(Based on SPRA, 2005 Commissioning Multicultural Evaluation, A Foundation Resource Guide)

	Culturally Responsive 	Equitable
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.






EE Project Website: <https://www.equitableeval.org/>



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