

Summary of Equitable Evaluation Practices in Philanthropy: Confronting Orthodoxies Course

April 18, 2018
Detroit, Michigan

Equity is achieved when there is an absence of avoidable or remediable differences among groups of people, whether those groups are defined socially, economically, demographically, or geographically.

- World Health Organization

From an equitable evaluation frame, evaluation is a tool to be used *in service* of equity. This six-hour training provided a typology of how philanthropy is addressing equity, a quick history of evaluation in philanthropy, principles of equitable evaluation, and evaluation orthodoxies. We then focused on how to overcome the orthodoxies in order to have more equitable evaluation practices.

Principles of Equitable Evaluation

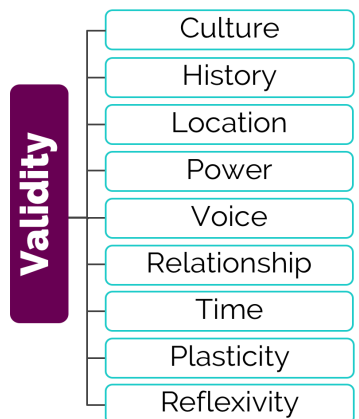
- Evaluation and evaluative work should be in service of equity.
- Evaluative work can and should answer critical questions about the:
 - a) Ways in which historical and structural decisions have contributed to the condition to be addressed,
 - b) Effect of a strategy on different populations,
 - c) Effect of a strategy on the underlying systemic drivers of inequity, and
 - d) Ways in which cultural context is tangled up in both the structural conditions and the change initiative itself.
- Evaluative work should be designed and implemented commensurate with the values underlying equity work -- multi-culturally valid and oriented toward participant ownership.

Foundation Evaluation Orthodoxies

Foundation evaluation orthodoxies are common beliefs that foundations hold about evaluation, which can act as roadblocks to achieving equity. The orthodoxies are those that rose to the surface as the most significant for participants.

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.
- **Because of time frames short-term outcomes are good indicators stewardship. ***
- Evaluation is in service of the foundation brand.



Traditional evaluation uses a series of validity tests to determine the accuracy of the tools, methodology, and findings. Using equitable evaluation, there is another set of validity tests (see above), leading to an evaluation that is more equitable and findings that more accurately reflect reality.

Actionable Steps

The most significant orthodoxies coupled with an expanded set of evaluation validity tests assisted the group in developing actionable steps to combat the orthodoxies in their foundations. Below are key orthodoxies and the steps identified by the participants that they could use when returning to their offices.

The foundation is primary user of evaluation.

- Make the foundation accountable to more than the board (e.g., the community or grantees).
- Share information that is easy-to-understand but substantial outside of the foundation and outside of academia.
- Move from reporting to discussions and stories starting on the front end of grantmaking to build relationships and trust.
- Facilitate a panel discussion of grantees around learning from evaluation and their experiences.

Evaluations should provide generalizable lessons.

- Shift the conversation and focus from generalizable lessons to a better understanding of data in context.
- Include qualitative data along with quantitative data.
- Educate the foundation and board about appropriateness and fallacies associated with generalizability.
- Write a memo with grant requests outlining the similarities and differences between grants that have similar strategies and/or outcomes that answers, how do these grants work together to accomplish the foundation goals?

Evaluators are the experts and final arbiters.

- Change foundation mindset to grantees as experts on their topics and their place, and work with them as such.
- Consider culture and context when using, recommending, or funding “best practice” programs.
- Create an opportunity or mechanism for non-traditional participants in the grantmaking and evaluation processes.
- Use consultants as facilitators for grantees and community members, rather than as “the experts.”

Because of time-frames short-term outcomes are good indicators stewardship.

- Use conversational reporting and a co-created timeline.
- Set expectation early for reporting.
- Ask for multiple methods for reporting that exhibit grantee strengths (e.g. video or conversation)
- Allow grantees the option to fail.
- Build time into grantmaking process to be strategic about evaluation.
- Set realistic expectations based on the timeline of the grant.

For more information: <https://equitableeval.squarespace.com>

