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

# 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 male)
- 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

eei **EQUITABLE EVALUATION INITIATIVE**

# Evaluation and Equity Ecosystetm
We believe these component parts must become an integrated ecosystem if we are to get someplace new and equitable.
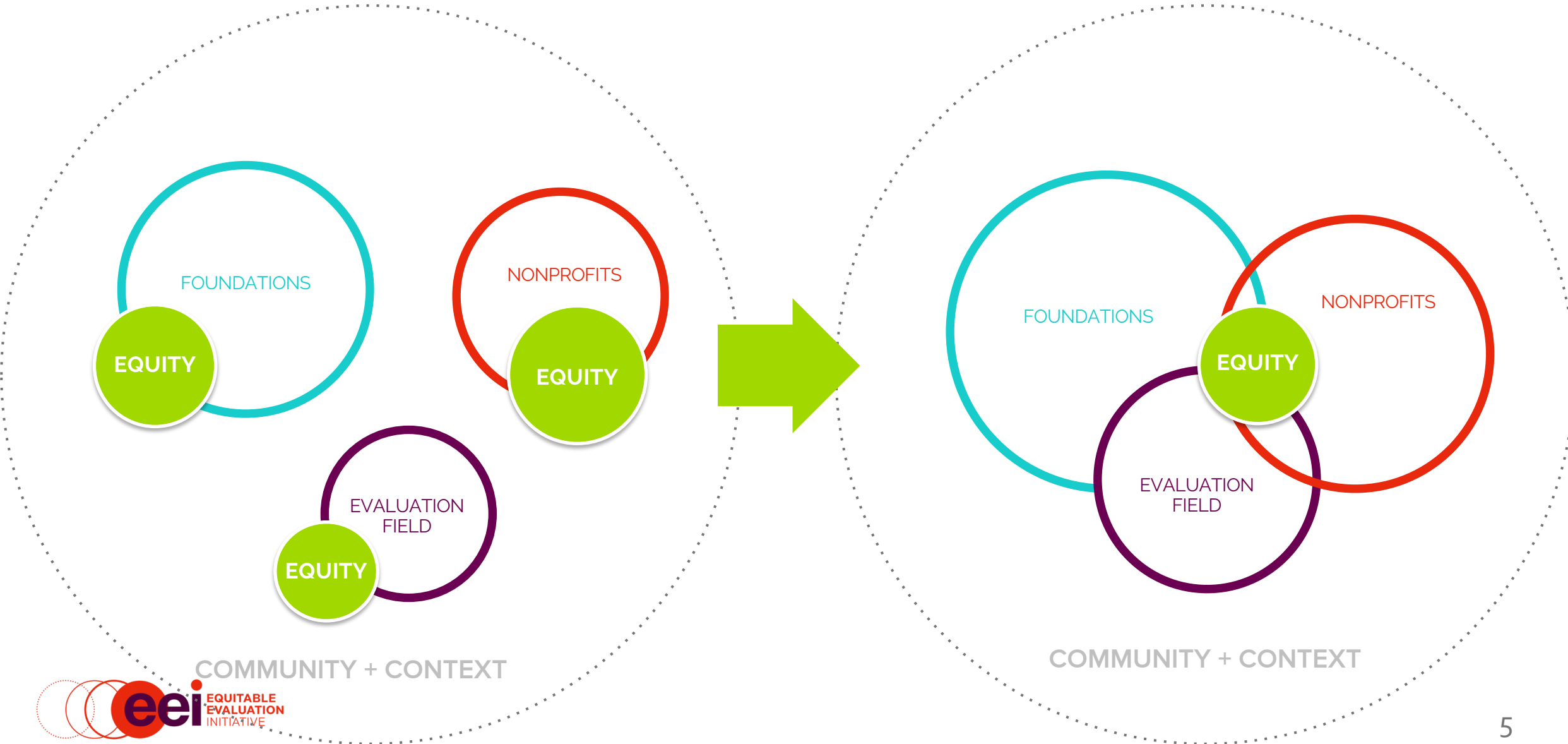
# Equity Working Definitions

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.. *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*

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# Equitable Evaluation

**Evaluation work is in service of and contributes to equity.**

**Evaluative work can and should answer critical questions about the:**

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

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

- 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.

- Multi-culturally valid
- Oriented toward participant ownership

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# EQUITY-FOCUSED EVALUATION PRINCIPLES

1. Has a 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
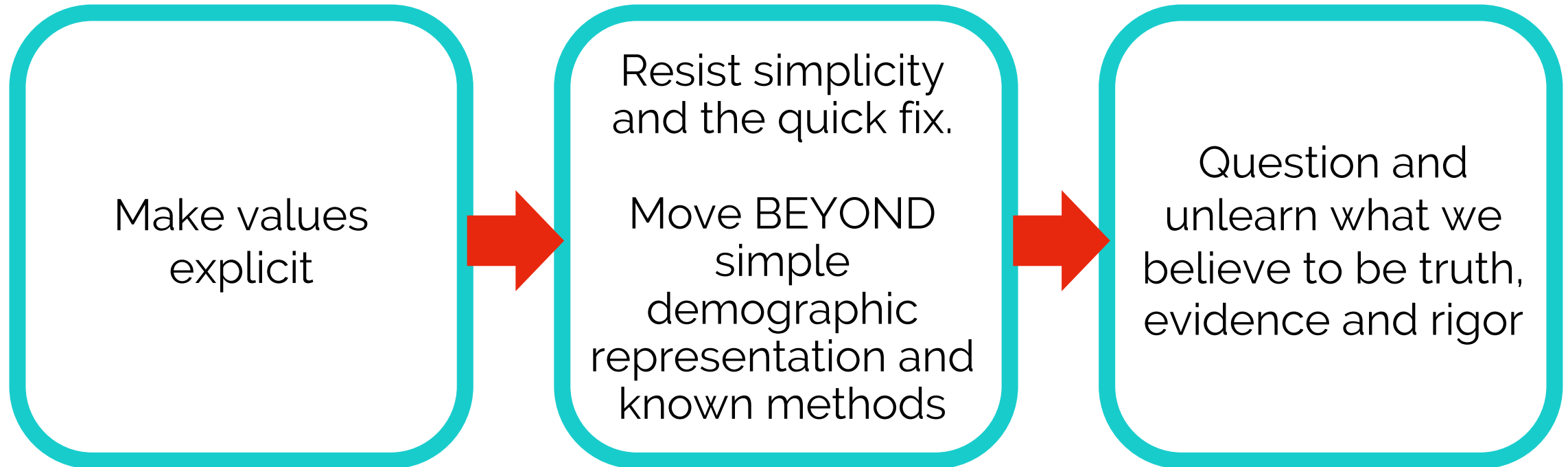6. Requires use post evaluation

Evaluation Questions

Evaluation Design

Evaluation Judgment

Evaluation Practices

Evaluation Use

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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

EQUITABLE EVALUATION INITIATIVE

# State of Play – Fall 2019

**Investment Partners**:
Ford, McKnight, Robert Wood Johnson, Irvine, SD Bechtel, Seattle, CalEndowment, Walton Family, Packard, (*MacArthur, TSFF, Conrad Hilton Foundation)*

**Field Partners:**
- Philanthropy: Johnson Center on Philanthropy, Grantmakers for Effective Organizations, Center for Evaluation Innovation, , PEAKGrantmaking , Associations for Advancing Equitable Evaluation Principles, *Environmental Grantmakers Association, Funders for Homelessness_*

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

**Making the Case**

**EMERGING Practice Partners**:
- *Consultants*
- *Foundations*
- *Field*

**Adopting EE Principles**

**Equipping for Transformation**

**Practice Partners**:
- *Consultants: Mathematica, TCC Group, Vantage Evaluation, Engage R&D, CEI, Colorado Collaboratory 2,*

- *Foundations :* Amplify Fund, Packard, AECF, Oregon  Community, Colorado Health Foundation, CalEndowment, Missouri Foundation for Health, Kresge

- *Field:* JCP, PEAK

**eei** EQUITABLE EVALUATION INITIATIVE

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# The Invitation

Embrace 21st century definitions of validity and complexity and reimagine the purpose and practice of evaluation to reflect the values and intentions that drive justice-seeking philanthropy and nonprofits.

EQUITABLE
EVALUATION
INITIATIVE

# Developmental Evaluation

**Purpose**: to support whole-system learning when we have complexity

- Framing problems and solutions
- Naming and testing assumptions
- Increasing line of sight around goals

The CREWS developmental evaluation had three core phases:

| Phase | Purpose |
|---|---|
| **Phase 1** <br> Develop a theory of change | • Clarify CREWS' aim, how it hopes to achieve these aims, and what outcomes it seeks to achieve in the short-, medium- and long-term |
| **Phase 2** <br> Conduct a portfolio analysis and grantee survey | • Assess the extent to which CREWS' aim align with grantees work (portfolio analysis) <br> • Better understand the value grantees derive from the CREWS community (grantee survey) |
| **Phase 3** <br> Interview a sample of CREWS grantees | • Clarify the tactics, outcomes, and early indicators of progress CREWS grantees are pursuing <br> • Identify external conditions that advance or limit progress towards outcomes |

# Jalonne's Reflections

When creating a theory of change, the **process** (thinking about what you want to achieve and how) is **often as important as the outcome** (the TOC document itself). Through the process, a funder often challenges its assumptions and clarifies what it wants to achieve. The TOC process helped Jalonne:

- Understand the importance of language and the words we use

- Articulate the assumptions around larger water sector challenges into words

- Delineate what short-term and long-term success looks like

- Articulate why we fund what we fund

- Re-evaluate what information is important to understanding grantee needs, initiative level progress

- Underscored the need to continue to strengthen "Kresge's learning" and "grantee learning" opportunities

# Phase 1: CREWS Theory of Change

| | |
|---|---|
| **Vision – What we want the world to look like** | Urban storm-water and waste-water systems are resilient to climate-driven flooding and provide reliable and equitable services to communities. Cities manage storm- and waste-water in a way that keeps people safe, healthy and economically unburdened in the face of flooding. |

| | | | |
|---|---|---|---|
| **Strategies – What we are doing** | **Convening urban water leaders** Convene urban leaders across sectors to strengthen networks and build climate resilience and equity knowledge that leads to action. | **Providing cities with evidence to make the case** Provide climate-vulnerable cities with evidence to make the case for policy and funding to strengthen storm- and waste-water systems planning and management. | **Investing in cities to become exemplars** Increase investment in cities that use a community-led and climate data-driven approach and have enabling policy conditions, in order to build equitable storm- and waste-water systems that are resilient to flooding. |

| | |
|---|---|
| **Short term outcomes** | Knowledge, Community Engagement, Funding, Policy, and Practice |

| | | | | |
|---|---|---|---|---|
| **Long-term outcomes** | Strengthened city, state, and federal water-management policies promote climate resilience and equity

Increased government and philanthropic funding, financing, and incentives for climate-resilient and equitable storm- and waste- water management in cities | Cities take an integrated approach to water systems planning and management, bringing together storm water, wastewater, and drinking water decision-makers, and collaborating across sectors as needed. | Cities and regions manage storm water and wastewater equitably, benefitting all community members economically, socially, and physically/mentally | Cities include all communities in decision making and action to drive solutions to climate challenges, providing funding and structure for the most vulnerable community members and CBOs that represent them to inform decision-making. |

| | |
|---|---|
| **Goal – our North Star** | Cities implement climate-resilient approaches to urban storm water and wastewater management, grounded in equity |

# Phase 2: Grantee and Partner Survey

CREWS grantees are well connected and continue to want more opportunities to **learn from and work with one another**.

CREWS grantees feel that their participation in the initiative strengthened their knowledge, particularly about **equity** and **climate.**

Grantees are **applying the knowledge gained through CREWS** to inform their own strategies, prioritize new community voices in their work, and design convenings.

CREWS grantees **collaborate with one another in many ways**, including co-presenting at conferences, sharing tools and data, and developing new initiatives or projects.

# Phase 3: Grantee Interviews

Interviewees represent organizations working on research, implementation of GI, capacity building, network building, and fostering collaboration.

**Outcomes tracked by grantees include** increased capacity of CBOs and residents to be change agents, collaboration among stakeholders, recognition of the value of GI, and awareness of decision-makers about water inequities

**Conditions that enable progress** include strong water leaders, supportive civic leaders, openness for innovation, existing infrastructure for cross-sector collaboration, sense of urgency, community connections, strong CBOs and community leaders

**Conditions that slow progress** include lack of consistent direction, resistance to community pressure, limited institutional capacity, lack of ownership of GI maintenance, inequity embedded societal structures that influence water systems, disunity among stakeholder groups