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Learning Circles as a Tool for Participant-Owned Evaluation

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Keywords: *Equitable grantmaking; equitable evaluation, learning circles, participant ownership*

Introduction

This article is co-authored by four people: Chan Brown, Virginia Roncaglione, Jennifer James, and Courtney Huff. Chan is the director of community partnerships at the Kansas Health Foundation (KHF) and serves as the program officer for both the Integrated Voter Engagement Initiative (IVE) and the Kansas Digital Equity and Inclusion Collaborative (KDEIC). Virginia, Jennifer, and Courtney are strategy, learning, and evaluation practitioners working with the two consulting organizations that are collaborating with KHF on the evaluations of the two initiatives.

Each of us has different identities and experiences that deeply inform our approach to the work and our interpretation of what it achieved. When *The Foundation Review* call for articles was published we had not all met, but Virginia, Courtney, and Jennifer were in relationship with Chan through the two initiatives. Serendipitously, both evaluation teams were piloting learning circles as a tool for participant-owned evaluation aligned with Equitable Evaluation Framework™ practice, which prompted us to partner on this piece.

Connecting as a group — across different projects, roles, lived experiences, and identities — was an opportunity to surface shared considerations, which appear in the fourth section of this article. At the same time, our experiences were very different and personal, so, following the EEF’s invitation to contemplate multiple truths and ways of knowing, we decided to share our subjective experiences, which we do in first-person voice in the next three sections.

Key Points

- Learning circles are an approach where individuals with a common interest meet regularly to learn from each other about a self-identified topic in a format chosen by the group. Honoring a group’s collective wisdom, centering participants’ learning needs, and prioritizing relationships and trust are all features of learning circles. This practice is of increasing interest to funders and evaluators as a tool for practicing learning and evaluation aligned with the Equitable Evaluation Framework™.
- Kansas Health Foundation and its strategic learning partners, Innovation Network and Harder+Company Community Research, are exploring learning circles in two of the foundation’s initiatives: Integrated Voter Engagement and the Kansas Digital Equity and Inclusion Collaborative. The foundation further applied the learning circle approach to the evaluation of these initiatives as part of its own practice in equitable grantmaking. By doing so, it is strategically following the lead of and yielding power to initiative partners.
- This article shares the authors’ individual experiences and collective reflections on being in the EEF practice, striving to shift ownership of the evaluation from foundations to participants. We offer considerations on 1) the foundation’s transition to equitable grantmaking and evaluation, 2) the formation and evolution of each learning circle project, and 3) what it takes to practice this approach in line with the EEF.

The descriptions and considerations we offer in this article are primarily grounded in our experiences as of March 2023, when we submitted

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— Chan Brown

this article. At the time, we were in the early stages of piloting learning circles as a tool for participant-owned evaluation. The impetus to write the article came from a desire to share the preliminary steps we were taking and the opportunities we saw with others who are also in the EEF practice, without waiting for years until the projects were completed.

Timing is also the main reason why only the perspectives of the foundation and its evaluation partners are reflected here. While we have ongoing, open conversations with the grantees (referred to throughout this article as partners) who participate in the two evaluation projects, we have not yet systematically discussed with them how it felt to have significantly more decision-making power in the design and implementation of the evaluation via the learning circles. Similarly, it is still too early for us to have substantial insight into the value and impacts of using a learning circle approach on all actors involved. We recognize the crucial importance of considering these questions and hope to share more insights in the future.

Reflections from Chan Brown

KHF's Evolution Toward Equity

Since its inception, KHF has been dedicated to improving the health of all Kansans through a wide range of evolving strategies aligned with the needs of Kansas' most impacted communities.

I joined KHF 12 years ago when I moved from Georgia to Kansas. Over the last seven years, I have witnessed and participated in a growing understanding that achieving the foundation's vision is linked to dismantling inequities identified by the social determinants of health. We realize that we won't be able to eliminate inequities that create health disparities by focusing on how to make healthy people healthier. As changemakers, we need to focus our attention on areas of the state with the greatest disparities, and to use multiple approaches beyond grantmaking to improve the health of all Kansans.

As transformational change requires transformational practices, we first needed to look inward at our own foundation's operations to consider what paradigms, mindsets, and practices needed to evolve further. Addressing health equity has been an evolutionary process influenced by major organizational transitions. We have had four CEOs in the last four years and lost valued staff members — including our grants management and evaluation staff — all while navigating the pandemic, responding to a racial reckoning, and supporting partners addressing multiple societal challenges. Each foundation president contributed to moving the organization forward. Through it all was KHF's commitment to health equity, with both board and staff growing together through this process.

Participating in the EEF Practitioner Cohort

In the fall of 2020, the foundation continued its evolution when it joined Class 2 of five EEF Practice Partners classes, representing 44 foundations. The class provided a venue to be in conversation about how organizations and individuals might be in the practice of the EEF.

I am grateful to have been part of this group. Amid the changes the foundation was undergoing, it was great to have the support of the EEF coaches and share reflections and learnings with other foundations. In our cohort meetings, we were encouraged to share what brought us joy and what was resourcing us, and to pause for self-reflection as we entered the space. What was

TABLE 1 Questioning Evaluation and Grantmaking Orthodoxies

Evaluation (and Grantmaking) Orthodoxies	KHF's Articulation of Equitable Evaluation and Grantmaking Principles
The foundation defines what success looks like.	Grant partners define what success looks like.
Grant partners and the strategies are the evaluation focus, not the foundation.	The evaluator and funder must turn a critical eye to their own practice, consider their power in relation to partners, and identify how they can shift to sharing that power.
Evaluators and foundation staff are the experts and final arbiters.	The role of evaluators and foundation staff is to support and enhance partners' expertise.
Evaluation and grantmaking are in service of the foundation.	Evaluation and grantmaking are in service of the partners and their community.

often resourcing me was my teammates and this group. Those Zen moments were appreciated during hectic back-to-back Zoom meeting days.

Being part of the class also offered me and the other program officers a chance to think about how we could try out new ways of being and practicing within our own organizations, aligning our evaluation practices to the EEF principles. We felt encouraged to think about incremental changes in certain aspects of our practices within our control. Shifting from a mindset of “all or nothing” to one of “possibilities” (Dean-Coffey, 2017) was liberating.

Questioning Grantmaking and Evaluation Orthodoxies

We began a deeper look at our grant application process, including critically considering who and how we want to engage, and ways to measure impact that mutually benefits the foundation and its partners. For example, when KHF launched its Building Power and Equity Partnerships Program our staff employed an approach that was more relational than the standard, written application questions. Through conversations, we learned about partners' hopes and dreams, community aspirations and assets, and challenges, and then determined which organizations were positioned to advance their aims and intentions with the support of the foundation.

In line with the “toward fluidity” EEF mindset (Dean-Coffey, 2017, p. 8), we also explored changes to make grantmaking practice more open, accessible, and respectful of applicants' time and expertise. As part of this process, we engaged Harder+Company to co-develop and facilitate a series of workshops to identify grantmaking behaviors and principles that would help to transform our collective grantmaking practice from one that focused on what the foundation seeks to achieve to one that supports how our initiative partners can make change happen.

A key feature of the workshops was to use a human-centered design process (IDEO Design Thinking, n.d.) to explore the grantmaking experience from the perspective of an organization seeking our support. This process helped us focus on being of service to our prospective initiative partners. We adapted the “foundations' orthodoxies” identified by the EEF (Dean-Coffey, 2017) to the grantmaking process, thereby establishing common principles for both the foundation and our evaluators. (See Table 1.)

A final step was to identify near-term “experiments” for program officers to try out these principles in our grantmaking practice. The experiments we identified were a big shift in perspective. In line with the EEF mindset “toward evolutionary” (Dean-Coffey, 2017, p. 8), we identified simple, relational steps, such as “breaking

The terms “learning circles,” “communities of practice,” and “learning communities” have often been used interchangeably. For this article, we define this approach as “groups of individuals with a common interest who meet regularly to learn from each other, and others, about a self-identified topic and in a format the group has decided upon”

bread” with partners to get to know what they find most important, thus moving away from the foundation as the expert and the grant as a specific transaction. We also identified larger, structural changes that would make better conditions for developing relationships, such as reforming the grant application processes to be conversational and focused on finding common ground as opposed to how well a proposal is written. As we considered these shifts, we also began to consider what orientations we desired in our strategic learning partners and identified that they should 1) engage initiative partners in identifying the data and information that would help them make decisions and progress on the challenges they care about, and 2) move beyond typical grant written reports to experiment with co-owned models of evaluation, as invited by Principle 2 of the EEF: “Evaluative work should be ... oriented toward participant ownership” (Dean-Coffey, 2017, p. 3).

Exploring Yielding Power Through Learning Circles

The evaluation projects of two of KHF’s initiatives in this article particularly exemplify this commitment to yielding power to and centering initiative partners’ learning interests

and practices while achieving higher levels of understanding and more meaningful results. While the two initiatives are different in context and characteristics, both are exploring learning circles as an approach for practicing evaluation in alignment with the EEF.

The terms “learning circles,” “communities of practice,” and “learning communities” have often been used interchangeably. For this article, we define this approach as “groups of individuals with a common interest who meet regularly to learn from each other, and others, about a self-identified topic and in a format the group has decided upon” (Keane, n.d., p. 1). Intended to lead to action and effective in facilitating culture change, learning circles have historically been used by groups seeking social change such as community organizations, trade unions, schools, and social justice groups (Norton, 2003; Building Movement Project, 2013; Peer 2 Peer University, n.d.). They have also occasionally been applied to the field of strategy and evaluation (Cohen, 2014). From my perspective, exploring learning circles was a way to take “baby steps” in moving beyond academic systems of rigor to different ways in which initiative partners might share about their work.

Expanding Strategic Learning Partnerships

During this period of evolution, we also reconsidered who we chose as strategic learning partners to ensure they would come along with us on this equitable evaluation journey.

Equitable evaluation encompasses so much more than helping initiative partners meet their goals. It’s thinking of the big picture about our role as a foundation. Cultivating a network, mobilizing resources, and building the power and influence of organizations are at the forefront of evaluating ourselves. We were intentional in selecting strategic learning partners that could help us think about how to address deep-rooted disparities and that believed equity was central to social change. We had worked with Innovation Network and Harder+Company before and knew that we shared a common goal of experimenting and growing together. So, with these

two initiatives, it was a matter of continuing to deepen the relationships.

With strategic learning partners who totally “get it,” it’s a lot easier to challenge our own mental models and push boundaries. Together, we posed questions to ourselves and grant partners about the problems we aim to solve, the assets within our communities, and the need to shed outdated orthodoxies and historical policies contributing to inequities.

Virginia Roncaglione on the IVE Initiative

I have been engaged with the learning and evaluation of KHF’s IVE initiative while working with Innovation Network, a learning and evaluation consulting organization that specializes in advocacy and social change. In recent years, the organization and its team members have been on a journey to center equity and social justice, using learning and evaluation to shift power to communities most impacted by inequities.

Innovation Network has been the learning and evaluation partner for the IVE initiative since its onset in 2017, when the foundation began supporting a cohort of community organizing and advocacy organizations in Kansas to develop IVE programs and incorporate them into their health equity work.¹ The IVE initiative has undergone two distinct phases with different funding partners and has kept 10 of the original 11 initiative partners.

Deferring Decision-Making to the IVE Partners

As the IVE initiative underwent these two phases, so did the evaluation. During Phase I, which occurred before I joined the project, the foundation was the evaluation’s primary beneficiary. It sought to provide KHF and its board with data and insights on the early impacts and lessons learned from the investment related to partner capacity to sustain IVE work, health

The big “aha” moment for me was realizing that ... more decision-making authority does not necessarily translate into ownership. Participation and decision-making authority invite to a preset space, whose paradigms are already set. Ownership requires the ability to define reality in one’s own terms and, in turn, exercise agency.

— Virginia Roncaglione

equity issue advocacy, and voter and community engagement.

However, during a sensemaking session at the end of Phase I, initiative partners posed their own questions and learning-related needs that had not been addressed by the evaluation. This feedback, received in parallel to KHF’s own shift in grantmaking practices and an increasing effort by some Innovation Network staff to practice evaluation in service of equity, prompted a set of conversations between the director of strategic learning and grants administration, the program officer for the IVE Initiative, and the Innovation Network project lead (all of whom have since left their organizations). They discussed changing the Phase II learning and evaluation project approach so that initiative partners are the primary beneficiaries and decision-makers, challenging the orthodoxies that foundations should be the primary users of evaluation and that the evaluation is in service of a foundation’s brand (Dean-Coffey, 2017).

¹ IVE combines “year-round nonpartisan voter engagement with community organizing activities to build a strong base of support that strengthens an organization’s ability to hold decision-makers accountable, impact public policy, and build long-term power for the communities they serve.” (Funders’ Committee for Civic Participation, n.d., p. 1)

Co-Creating the Learning and Evaluation Project

I joined the Phase II learning and evaluation project in 2021 with the mandate of bringing this vision into reality. I was very excited because I am committed to participant ownership, which I see as an opportunity to shift the power and resources of learning and evaluation into the hands of communities that have the most experience and knowledge about the very issues that affect them (Roncaglione, 2022).

To design and implement a learning and evaluation project with the initiative partners as the primary “owners,” I started by surfacing their values and goals related to the initiative and related its learning/evaluation and determining what information and knowledge would be valuable and important to them (Center for Evaluation Innovation et al., 2017). This approach challenges the orthodoxy that foundations — not grantees — should define what an initiative’s success looks like, and how success should be measured (Dean-Coffey, 2017). Between October 2021 and March 2022, the IVE program officer at the time and I facilitated a multistep co-creation process that leveraged unanimity- and voting-based decision-making for partners to articulate their vision of success for the IVE initiative, the topics and questions they wanted to pursue through the initiative’s learning and evaluation, and the methods that best responded to their learning needs.

The process surfaced that the core value proposition of the IVE initiative according to the partners was to foster relationships and knowledge-sharing among the organizations and build a network of groups capable of collective electoral action in Kansas, a state where these types of efforts may otherwise be isolated. Among the various approaches proposed, learning circles were unanimously chosen by partners as the one that would best serve the initiative goal as well as their learning needs.

Learning Circles as an Approach Aligned With Partners’ Priorities and the EEF

In line with this approach, during the co-creation process IVE partners envisioned for the learning circles to have

1. a participant-led nature, with partners deciding purpose and learning objectives for the circles, facilitator’s duties, cadence and length of meetings, and mechanisms for collecting and sharing findings, and
2. orientation toward action, with the circles being an opportunity to work collectively to advance the cohort shared goals. (See Table 2.)²

The relational, power-sharing, and activist nature of this approach made this practice one that is in line with the partners’ learning preferences as well as the EEF.

Growing Edges: From Participation Toward Reciprocity

Many growing edges “sprouted” for me in facilitating participant ownership for the IVE initiative’s evaluation. The most prominent one was shifting from a participatory to a reciprocity mindset (Dean-Coffey, 2017). While the choice to pilot a participant-owned project was informed by the IVE partners’ feedback and informally run by some of them ahead of the onset and throughout the project, there was not a structured process to create a shared understanding of what participant ownership meant and which conditions partners would need in place to exercise ownership in ways that they wish (Gonzales, 2019) before questions and tools were discussed.

The big “aha” moment for me was realizing that, just like increased participation cannot be conflated with increased power (Wilmsen, 2012), more decision-making authority does not necessarily translate into ownership. Participation and decision-making authority invite to a

² A note on the how: We find that experiential articles are helpful in describing why, but they often leave readers wondering, “How did they do it?” Table 2 presents some of the elements of how the IVE and KDEIC initiatives designed the learning circles, and would welcome further conversation both for sharing and learning.

TABLE 2 IVE and KDEIC Learning Circle Session Characteristics

Characteristic	Integrated Voter Engagement Initiative (IVE)	Kansas Digital Equity and Inclusion Collaborative (KDEIC)
Context	Previous relationships between initiative partners, the foundation, and the evaluation team.	New relationships between initiative partners, the foundation, and the evaluation team. Power differentials based on sector (public, nonprofit, academic) and leadership (white-led/People of Color-led).
Initiation	Initiative partners chose to use a learning circle approach.	The foundation offered the space for collaboration and learning.
Audience	Learning circles were open to all initiative partner staff and the foundation and evaluation team. Another funder was invited to one session.	Learning circles were open to initiative partner organization staff, the foundation, and evaluation team staff working on the project.
Topics	Session topics were identified through the co-creation and feedback process as well as ongoing communications.	The foundation and evaluation team selected the topics for the earlier sessions, then initiative partners voted and prioritized topics of interest for future sessions.
Facilitation and agenda	Each session was initially facilitated by two initiative partners, but due to limited bandwidth, they suggested bringing in external facilitators. The evaluation team as facilitators created and maintained a topics-and-facilitators' calendar, facilitated agenda brainstorms, created slide decks and other facilitation tools, and operated virtual breakout rooms and polls.	The evaluation team developed an agenda in line with initiative partner interest, conducted pre-circle initiative partner interviews, and curated results in a pre-session memo for the group's preparation. Meeting facilitation was supported by the evaluation team, but largely self-moderated.
Frequency and duration	Virtual sessions took place quarterly and lasted for 1 to 1.5 hours.	Virtual sessions took place quarterly and lasted 2 hours.
Insights documentation	The evaluation team developed emerging learnings from the circle sessions and compiled them in meeting notes.	After the session, the team added to the pre-learning circle memo a summary of key learnings from the discussion and a set of reflection questions to support continued engagement.

preset space, whose paradigms are already set. Ownership requires the ability to define reality in one's own terms and, in turn, exercise agency. Thus, for example, remarks by some partners on participation in the project being a "grant requirement" surfaced on more than one occasion, corroborating my intuition that ahead of us is more work to do in relationship with the IVE partners to acknowledge interdependence and foster mutual understanding and accountability (Dean-Coffey, 2017).

Growing Edges: Equity Vs. Equality.

Another key question Chan and I are still pondering is this: "How many and which participants constitute ownership?" IVE partners are vastly diverse in their goals, approaches, populations of focus, budgets, and more. Such differences have influenced differentials in how much bandwidth organizations have for participating in learning and evaluation. While we have offered the same touchpoints to all organizations and used unanimity-based decision-

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— Jennifer James and Courtney Huff

making approaches, these disparities have at times manifested as some organizations being more active in shaping the project.

We understand that the responsibility of creating a “liberated playing field” lies primarily with those with the most power in this ecosystem (i.e., KHF and Innovation Network). We are exploring how to engage the initiative partners in such a way that fosters equity so that learning circles provide an avenue to meet the needs of its diverse members. We would be delighted to hear from others in the practice on how they have approached this or similar challenges.

Courtney Huff and Jennifer James on the Digital Equity and Inclusion Collaborative

In 2021, KHF engaged us to support them in developing and evaluating a new initiative. To be clear, the use of a learning circle was not an intentional design element at the start. Learning circles became a focal point of the evaluation over time, and for two reasons. First, the foundation, with Chan at vanguard, was shifting its mindset and developing new approaches for who defines and adapts strategy. She was evolving from strategy directed by the foundation to one that is done with initiative partners.

Second, our own practice as evaluators was shifting. We were (and are!) deepening our understanding of our own power and responsibility as evaluators to center more intentionally

and directly on those closest to the issue. The use of learning circles was an embodiment of these shifts, and we were excited to support its implementation. And while we can't state that learning circles created the conditions for transformation, we see some evidence of changes that indicates that this practice is one that is in service of equity.

Designing an EEF-Informed Practice

Integrating equitable evaluation principles was not something initially designed for, and this practice deepened over time. Our initial design identified the key elements of the foundation's strategy and a corresponding system to track the initiative's progress and successes. This approach addressed some of the orthodoxies of evaluation identified in the EEF — qualitative and quantitative data were both deemed credible, and we took into account the organization (both funder and initiative partners) and not just the program (Dean-Coffey, 2017).

However, we did not fully engage initiative partners in what they wanted to achieve. Our evaluation was still ultimately organized by and keyed to topics of mutual interest that Chan observed. As a result, Chan and the two of us were still holding power over the initial “learning session” content — it was for the initiative partners but was not designed by them. This tacitly cued partners that the foundation is the ultimate decision-maker, thereby reinforcing the foundation's power in the relationship. Our realization of this dynamic resulted in a shift in our design from foundation-oriented learning sessions to learning circles informed by initiative partners.

Shifting Key Practices to Realize Participant-Owned Learning Circles

The key to shifting to learning circles was to intentionally focus on what initiative partners needed to be successful. Instead of identifying features of the foundation strategy and inviting partners in, we asked partners to identify topics of most importance to them. We used conversation-based interviews to understand how partners define success and what they want to learn from one another. In acknowledgment of

how busy initiative partners are, we continued the role of summarizing conversation results, sharing summaries with and across initiative partners, and developing learning questions that promote reflection for our sessions.

It is of note that while the focus of the work shifted more fully to the initiative partners, we still include Chan as a participant and a valued voice. Shifting focus toward participant-ownership approaches did not mean she had to step out of the equation and the work. Suggesting that would be both naive and disingenuous. Chan still monitors the strategy's development and will continue to use what is learned to guide future engagement and funding. However, the approach allowed her to learn and deepen her relationships with and knowledge of the initiative partners.

How Learning Circles Advance Equity and Utilize EEF Principles

As described above, the very process of learning circles directly addresses EEF's first principle of promoting equity by centering on the experiences and needs of those who are closest to the social issue (in this case, initiative partners and the communities they represent). Learning circles can be used in service of EEF's first principle, which is about evaluative work holding the responsibility to advance progress toward equity (Dean-Coffey, 2017). It also addresses EEF's second principle, that it be "designed and implemented commensurate with the values underlying equity work" — most notably being oriented toward participant ownership (Dean-Coffey, 2017, p. 3).

What is now emerging from the learning circles is connected to EEF's third principle — historic and structural decisions as well as system drivers. Consider the following. As we have nurtured initiative partners' trust in us and the safe space of the learning circle, they have begun to address tough issues related to structural issues that prohibit deeper collective action. The initiative is comprised of four partners with very different orientations and approaches, from small and large community-based organizations to even larger public entities. The learning

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circles became a space to discuss concerns and challenges, including competition and collaboration for limited resources, expectations, accountability, and challenges related to size and the composition of leadership. These issues came to light not because of the foundation or the evaluator. The catalyst was the learning circles' open topic format and the conditions that build relationships and trust. The partners have developed a deeper understanding of one another and a willingness to work together in ways that are mutually beneficial. And while this was happening, Chan gained a window into how to further support movement building and an important evidence point for the evaluation.

How Learning Circles Are a Key Method to Evaluation

The learning circle approach to evaluation is still evolving for us. We continue to maintain a framework that includes what the foundation wants to achieve, but we hold this lightly and are able to incorporate the unintended benefits and success (as well as challenges) that emerge through the learning circle. We are also finding that the normal challenges of bringing people together continue to exist: finding time for everyone to meet, ensuring that the learning circle is in service of each of their unique learning and growth versus a "have to do," and encouraging broader engagement from each initiative

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partner (as opposed to only the grant lead). We will be testing our assumptions about the benefits of learning circles with the initiative partners to understand more how it has benefited them and their organization and look forward to the ongoing partnership with initiative partners and Chan.

Using Learning Circles as a Method Aligned With the EEF

The four of us came together to write this article as we had a burgeoning sense that the learning circle approach is one way that foundations and evaluators can re-center their evaluation approach on initiative partners and the communities they serve. As we discussed and workshopped our experiences for this article and in the desire to support each other in practicing evaluation that further centers equity, we surfaced and offer the following collective reflections on using this approach, in line with the EEF:

- *Remember that methods are a manifestation of a paradigmatic change.* Practicing the EEF is much larger than the evaluation methods chosen. It directly addresses the deeper mental models of a foundation and, in both cases, has spurred changes in KHF's general practices. Using learning circles models equity principles that can be extended to grantmaking and other foundation practices as it necessitates interrogating and re-orienting who the work benefits. For example, as the KDEIC evaluation shifted to learning circles, Chan also shifted her approach to strategy. Instead of leading the strategy and partners followed, she listened during the learning circles for clues on how to support their work and what other interventions might be needed to achieve their shared goals.
- *Loosen control over the learning direction, while being clear on what you still need.* For learning circles to live into their promise of an approach aligned with participant ownership according to Principle 2 of the EEF, foundations and the evaluation partners need to relinquish a fair amount of control over what insights the learning circles will yield and for whom these learnings benefit. This also entails foundations' boards and leadership letting go of expectations of dashboards and performance metrics, challenging the philanthropic orthodoxy that "accountability is a one-sided set of expectations, generally set by the foundation" (Equitable Evaluation Initiative, 2022, p.1). In both projects, the ongoing documentation of the initiative partners' learning as the work progresses is the core input for KHF to also glean learnings related to the initiatives. These inputs provide a richer understanding of how the work is progressing to Chan, who believes that centering on partners' learning practices will help her to achieve higher levels of understanding and more meaningful results for communities.
- *Consider bandwidth in participant ownership.* Participant ownership requires creating conditions for change such that partners wield the increased power and resources that are being shifted to them. It does not mean participants do more than they have bandwidth or interest for. Groups benefit from support that is aligned and responsive to their needs. For example, a third learning circle session

of the IVE project, originally planned for after the November elections, was canceled. This was in recognition of the time and commitment initiative partners had dedicated to the electoral season, which did not leave sufficient bandwidth to plan and implement a session. This choice promoted self-care and centered on the human needs of all parties involved.

- *Recognize and tend to power dynamics.* While learning circles are conceived with an equitable structure whereby all participants have the same right and opportunity to speak (Norton, 2003), the presence of evaluators and funders, who have historically been the power holders in evaluation, may have unintentional influence over what is discussed. This must be named and managed on a regular basis. Further, power dynamics may also exist between partners, due to existing relationships in nonprofit ecosystems and competition for funding. For a learning circle to embody its equitable structures, it is important to invite open conversations about what different actors need to mitigate them, such as power differentials between funded partners due to sector (public, nonprofit, academic). This was not part of the initial design of the KDEIC learning circles, but was an unintentional, added value.
- *Be OK with trying things out and sharing things early.* Being willing to share about learning circles at this stage means that we may not be able to answer questions readers may have. What is the long-term impact? What iterations of this approach might spark other changes in grantmaking practices? What feedback would initiative partners offer that we need to consider? Our transparency in exploring and sharing shortcomings and successes is part of what it means to be an EFF practitioner. The greater goal is reimagining evaluation as a more equitable endeavor and in support of more equitable outcomes.

Conclusion

The journey of equity necessitates committed travel partners who understand that the EFF is

not an interesting theory, but a deeper experiential level that grounds our approach and helps in keeping all parties accountable. Learning and evaluation groups working in partnership with foundations hold significant responsibility in this sense, as they can leverage their power to challenge a foundation to align its processes in ways that value participant ownership, uncover the power dynamics in funder-partner relationships, and help foundations strategize on addressing the underlying system drivers of inequity both in evaluation and the grantmaking.

Like many in this field, over the past few years we have each been on a journey to center equity in our work. Being in community with one another supports deepening Equitable Evaluation Framework™ practice by inviting discussion and mutual accountability. We will be looking for opportunities to explore these insights with others as we deepen our own practice.

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