

# The Foundation Review

---

Volume 15  
Issue 3 *Equitable Evaluation Framework*

---

9-2023

## In Conversation: Two Community Foundations in Dialogue About Their Equitable Evaluation Framework™ Practice

Madeline Brandt  
*Oregon Community Foundation*

Kelly Casey  
*Hartford Foundation for Public Giving*

Jean-Marie Callan  
*Oregon Community Foundation*

Joel Hicks-Rivera  
*Hartford Foundation for Public Giving*

Kim Leonard  
*Oregon Community Foundation*

*See next page for additional authors*

Follow this and additional works at: <https://scholarworks.gvsu.edu/tfr>



Part of the [Nonprofit Administration and Management Commons](#), [Public Administration Commons](#), [Public Affairs Commons](#), and the [Public Policy Commons](#)

---

### Recommended Citation

Brandt, M., Casey, K., Callan, J., Hicks-Rivera, J., Leonard, K., Nguyen, M., Tamanas Ragusa, E., Stancil, C., Salmond, K., Seel, B., & Szczerbacki, K. (2023). In Conversation: Two Community Foundations in Dialogue About Their Equitable Evaluation Framework™ Practice. *The Foundation Review*, 15(3). <https://doi.org/10.9707/1944-5660.1665>

---

## **In Conversation: Two Community Foundations in Dialogue About Their Equitable Evaluation Framework™ Practice**

### **Authors**

Madeline Brandt, Kelly Casey, Jean-Marie Callan, Joel Hicks-Rivera, Kim Leonard, Madeline Nguyen, Elena Tamanas Ragusa, Cierra Stancil, Kimberlee Salmond, Becky Seel, and Kate Szczerbacki

# In Conversation: Two Community Foundations in Dialogue About Their Equitable Evaluation Framework™ Practice

Madeline Brandt, M.P.H., Oregon Community Foundation; Kelly Casey, M.Phil., Hartford Foundation for Public Giving; Jean-Marie Callan, M.P.A., Oregon Community Foundation; Joel Hicks-Rivera, M.S., Hartford Foundation for Public Giving; Kim Leonard, M.P.A., Oregon Community Foundation; Madeline Nguyen, M.P.H., Hartford Foundation for Public Giving; Elena Tamanas Ragusa, Psy.D., Drive Evaluation Studio; Cierra Stancil, M.A.P.P., Hartford Foundation for Public Giving; Kimberlee Salmond, M.P.P., Becky Seel, M.P.H., Oregon Community Foundation; and Kate Szczerbacki, Ph.D., Hartford Foundation for Public Giving

**Keywords:** *Equitable Evaluation, evaluation, research, power, foundations, philanthropy, learning, trust, measurement, equity, racial equity, community foundation, Hartford, Oregon, cultural responsiveness*

## “Get to Know Us”: Author Profiles

As we prepared for this conversation, we wanted to stay grounded in who we are — not just professionally, but also our positionality and who we are as people. One tenant of the Equitable Evaluation Framework™ is bringing your whole self to the work. In keeping with that belief, we wrote these profiles to provide insight into what we care about and how we show up in the world.

### Cierra Stancil

- Identities I bring to this space: Black, African American, cisgender straight woman; Hartford, Connecticut, native; community-based thought partner; senior community impact officer (grantmaker).
- Philanthropic orthodoxy I’m most likely to challenge: “The foundation defines what success looks like.” It certainly does not (lol). This is a tough balance to strike. I’ve begun to see myself as a conduit for others to use in support of social change. Kind of a weird concept, but the mental framing has helped me do my job (especially the parts I don’t love).
- Best sandwich: I love tuna full of veggies on wheat with provolone cheese!
- What brings me joy: Traveling. Traveling has created many scenarios where I’ve been

## Key Points

- This conversation between staff at the Oregon Community Foundation and the Hartford Foundation for Public Giving shares how we are infusing the Equitable Evaluation Framework™ into our practice as we aim to be less extractive, shift power, and honor all ways of knowing and being as valid. In sharing this conversation, we want to pull the curtain back and offer a behind-the-scenes view into the conversations, realities, and challenges involved in doing this kind of work.
- We sat down together for 90 minutes on a Wednesday afternoon, and the following is a rough transcript of our time together. The intention is not for the article to be an exemplar, but instead to demonstrate the complexities in applying the EEF in real settings and the patience and persistence it takes for organizational (and personal) transformation.

(continued on next page)

confronted with and have been able to overcome some of my deepest fears. Travel has made me a less fearful person in my everyday life.

- Words and phrases I most overuse: “I hope this makes sense.” (I’m not being

## Key Points (continued)

- We started our conversation with these questions: 1) Why is applying the EEF principles and challenging orthodoxies important for your practice? How is this approach helping us show up authentically? 2) What does applying EEF principles/ challenging orthodoxies look and feel like for you now? How are you infusing it in your work? Where does it feel easier or harder, and why? 3) Where do you hope to go from here? What does applying the EEF look like for you in the future?
- Along the way, the conversation gives the opportunity to see that our practice and takeaways as Equitable Evaluation partners and practitioners vary depending on who we are and our role in the foundation. We speak to the many ways that this work can “look” and the ways that the journey of each foundation is shaped by its starting place, mission, and culture. We hope readers will see themselves within the dialogue and understand that there are many ways to start, engage in, and further this work.

condescending when I ask this! I always mean it when I say it!)

- Words of wisdom: “The best is the enemy of the good.” — Voltaire

## Joel Hicks-Rivera

- Identities I bring to this space: Latino, Puerto Rican, brown, male, queer, first-generation American, college educated, professional, senior community impact officer (grantmaker).
- Philanthropic orthodoxy I’m most likely to challenge: “The foundation defines what ‘success’ looks like.”
- Best sandwich: Cuban or Italian deli combo.
- What brings me joy: Taking time to disconnect from work and connecting with my loved ones daily.

- Words and phrases I most overuse: “I have to write this down because I will forget.” “In full transparency ....” “Let’s be honest and real.” “This is too complicated. Can we just simplify this?”
- Words of wisdom: Be kind to yourself and forgive yourself.

## Kate Szczerbacki

- Identities I bring to this space: White, cisgender woman; queer/bisexual; college educated; middle-aged; evaluator, learner; director of strategic learning and evaluation.
- Philanthropic orthodoxy I’m most likely to challenge: “Grantees and strategies are the evaluand, not the foundation.”
- Best sandwich: Tuna salad on rye (extra pickles).
- What brings me joy: My partner, my cat, gardening, Tom Petty songs, hockey goal horns, pie, spring, new socks, old dogs, books as gifts, hearing “I was thinking of you.”
- Word or phrase I most overuse: “I’m going to be plain/honest/blunt.”
- Words of wisdom: “Look, we are not unspectacular things. We’ve come this far, survived this much. What would happen if we decided to survive more? To love harder?” — Ada Limón

## Maddie Nguyen

- Identities I bring to this space: Asian/ Vietnamese-American, second-generation American, queer femme, educated, multilingual, creative, researcher, learning and evaluation officer.
- Philanthropic orthodoxy I’m most likely to challenge: “Credible evidence comes from quantitative data and experimental research.”
- Best sandwich: Bánh mì đặc biệt.

- What brings me joy: Stickers, peanut butter, ice cream, animals, homemade foods.
- Words and phrases I most overuse: Like a true Californian, “like” — “OK, but, like ....”
- Words of wisdom: “When I choose to see the good side of things, I’m not being naive. It is strategic and necessary. It’s how I’ve learned to survive through everything. ... This is how I fight.” — Waymond Wang, “Everything Everywhere All at Once”
- Best sandwich: Anything on good bread with a copious amount of pickles.
- What brings me joy: Long talks with loved ones, travel, a stack of books to read, a beautifully crafted cocktail, family, dogs ... and sugar.
- Words and phrases I most overuse: “How are we going to socialize this?” (work), and “What do you want for dinner?” (life).

### Kelly Casey

- Identities I bring to this space: White, queer femme, listener, facilitator, researcher, collaborator, thought partner, family member, educated, senior learning and evaluation officer.
- Philanthropic orthodoxy I’m most likely to challenge: “Grantees and strategies are the evaluand, not the foundation.”
- Best sandwich: Anything with cheese.
- What brings me joy: Being in conversation with people. Poetry. Trees. Painting. Coffee. My loved ones and the animals in my life.
- Words and phrases I most overuse: “Fit for purpose” — “How will we use this information and for what purpose?”
- Words of wisdom: “One of the most vital ways we sustain ourselves is by building communities of resistance, places where we know we are not alone.” — bell hooks

### Kimberlee Salmond

- Identities I bring to this space: Korean adoptee, child of British expats; older sister, aunt, friend; cisgender straight woman; educated; reader; question asker; dog owner; unabashed pickle enthusiast; director of research and learning.
- Philanthropic orthodoxy I’m most likely to challenge: “Grantees and strategies are the evaluand, not the foundation.”

### Kim Leonard

- Identities I bring to this space: deeply empathetic mother, wife, cisgender, hetero female; white; college educated; elder millennial; learner, evaluator, analyst, thought partner, facilitator; dot- and people-connector; seeker of improvement, equity, and justice; previous Oregon Community Foundation senior research and learning officer.
- Philanthropic orthodoxy I’m most likely to challenge: Either “evaluators are objective” or “the foundation defines what success looks like.”
- Best sandwich: Cheesesteak from The Pickle Barrel in Bozeman, Montana.
- What brings me joy: Watching my daughter having fun, tending to our veggie garden, being near or in water, a big messy pile of qualitative data, bad reality TV and really good movies, baking with chocolate, Irish breakfast tea on a rainy day.
- Words and phrases I most overuse: “I’ll stop babbling now” or “does that make sense?”
- Words of wisdom: “We are all stardust.” — Carl Sagan (It reminds me to step back, keep perspective, and stay in wonder of the world.)

## Becky Seel

- Identities I bring to this space: Woman, white, Jewish, cisgender; frequent childhood mover; middle-aged mother; former union organizer; emerging artist; lover of questions, questioning lover, listener; research and learning officer.
- Philanthropic orthodoxy I'm most likely to challenge: "Credible evidence comes from quantitative data and experimental research."
- Best sandwich: Brisket sandwich with so much sauce it runs down my arms.
- What brings me joy: Playing games (indoor, outdoor, without a winner); moving to music; learning to ride a motorcycle; mushroom hunting and rock hounding with kids; one-on-one time with friends.
- Word or phrase I most overuse: "I was reading 'The Art of Gathering' and ...."
- Words of wisdom: "If you're really wishing someone well, it's hard to judge them." — Julian Treasure

## Jean-Marie Callan

(I hyphenate professionally to keep it together — Jean-Marie — or shorten frequently to keep it brief — "JM.")

- Identities I bring to this space: Researcher and learner; daughter, sister, aunt; introvert of few spoken words; fifth-generation Oregonian and former NYC transplant; youngest of four kids; college-educated philosopher, economist, and public servant; monolingual; cisgender, straight white woman; senior research and learning officer.
- Philanthropic orthodoxy I'm most likely to challenge: "Evaluators are the experts and final arbiters."
- Best sandwich: Is a hotdog a sandwich? That's not it, but the question gets to a dilemma I have. Perhaps a freshly baked everything bagel with cream cheese, lox, tomato, red

onion, and capers. But I wouldn't call that a sandwich exactly!

- What brings me joy: Making stuff, playing with words, the ocean, "a-ha" moments, dancing emojis, big trees, silly jokes, the smell of something baking.
- Words and phrases I most overuse: "Well ...."
- Words of wisdom: "Almost everything will work again if you unplug it for a few minutes, including yourself." — Anne Lamott

## Elena Tamas Ragusa

- Identities I bring to this space: First-generation Cypriot-American; cisgender straight woman; first-generation college grad; mother x2; first born; researcher/evaluator/college professor/psychologist; business owner; wife; New Yorker not living in New York; learning and evaluation consultant.
- Philanthropic orthodoxy I'm most likely to challenge: "Evaluators are the experts and final arbiters" or "credible evidence comes from quantitative data and experimental research."
- Best sandwich: Prosciutto and fresh mozzarella panini, Philly cheesesteak with fried onions and mushrooms, grilled halloumi with tomato on a toasted pita.
- What brings me joy: My people, a good book, any sort of brain teaser or logic puzzle, a sunny 68-degree day, a long walk with my dog, great music, traveling to anywhere new.
- Words and phrases I most overuse: "Does that make sense?" and "gentle consensus."
- Words of wisdom: "Dream. Try. Do good." — Mr. Feeny, "Boy Meets World," circa 2000

## Madeline Brandt

- Identities I bring to this space: Cisgender white woman; Oregonian; wife, daughter, sister, friend; writer, reader, researcher, previous

Oregon Community Foundation research and learning officer.

- Philanthropic orthodoxy I'm most likely to challenge: "Evaluators are objective."
- Best sandwich: A Thanksgiving po-boy from Parkway in New Orleans with fries for the table.
- What brings me joy: That first cup of coffee, making my husband laugh, watching my dogs run, long days in the Washington woods, Neil Young.
- Words and phrases I most overuse: "Rad!"
- Words of wisdom: "What if all research was done just because we loved people? Not because we wanted fancy careers, but just because we wanted everybody to be healthy and whole." — Abigail Echo-Hawk

## Introduction

**Kate Szczerbacki** (she/her): Hello, readers! We're so happy you're joining us. I'm director of strategic learning and evaluation at Hartford Foundation for Public Giving.

**Kimberlee Salmond** (she/her): And I'm the director of research and learning at the Oregon Community Foundation.

**Kate:** We wanted to present our "article" as a conversation to show the humanity of this work, and to demonstrate how we're actively growing, changing, and learning. Kimberlee and I will serve as bookends to the conversation, first by providing context about our foundations and our engagement with the Equitable Evaluation Initiative. We believe that the conversation transcript you will read below is our way of showing a definition of equity as a means drawn from Change Elemental<sup>1</sup> that the Equitable Evaluation Framework<sup>TM</sup> describes as "equity as a means — working toward outcomes in ways

that model dignity, justice, and love without re-creating harm in our structures, strategies, and working relationships."<sup>2</sup> The two foundations that the discussants represent are both striving toward similar goals; in opening up what would normally be a closed conversation between peers that contains ... emotions, history, and cultural context — we hope to demonstrate that the very way that we talk about our work and are present with each other is an essential component to applying equitable principles and undo and unlearn orthodoxies. Also, a potential critique of this type of deep dive conversation among foundation staff is that it is an example of classic philanthropic navel-gazing. However, we ask you to consider that this type of reflective exchange is a practice to be embraced when we are trying to move away from the EEF-identified orthodoxy that only grantees and strategies are the subject of evaluation and evaluative thinking, not the foundation.

**Kimberlee:** We have edited and tightened remarks slightly but left it deliberately conversational to reflect the intent more accurately — an informal learning dialogue between peers. Things may feel bumpy to the reader, but we ask to consider how the written word here translates to conversation. You will notice that everyone plays a different role — some are great elaborators or bring in nuance, while others are reinforcers and lift insightful moments or go deep on a specific point. All the roles are helpful in conversation. People were appreciative of one another and acknowledged the previous speaker at almost every turn. As presented here in writing, this may feel unnecessary to the reader, but it was important in the conversation. This approach also aligns with the recent EEI publication highlighting a shift toward attribution.

We're also pulling back the curtain on facilitation, and the kinds of prompts and acknowledgments that move our conversation forward — how this role encourages people to speak,

<sup>1</sup> See <https://changeelemental.org>

<sup>2</sup> Equitable Evaluation Initiative. (2023, May 21). EEF expansion: Elements of the EEF. Equitable Evaluation Initiative, para. 2. <https://www.equitableeval.org/post/eeef-expansion-eeef-elements>



*We were taught, many of us, or myself at least, to be observers, objective data collectors, analysts, experts. Definitely not to let people see the messy stuff that happens in the middle. That's scary, and I think doing that well requires being able to be yourself and create space for other people to be themselves, so that we're all able to contribute authentically.*

— Kim Leonard  
Oregon Community Foundation

reinforces and summarizes, and carries us on to new questions. The transparency and vulnerability we asked of ourselves in how we showed up in both the author bios here and the discussion below are a deliberate choice and challenge the EEF orthodoxy, that evaluators are objective and don't bring their full selves and perspectives to the work.

Finally, we offer an invitation to sit with the EEF before or alongside this piece, to see what orthodoxies emerge naturally. For example, the conversation pushes against beliefs like “evaluators are the experts and final arbitrators” and “trust and relationship come from doing the work but are not the starting point,” but we trust that the reader will find many more.

**Kate:** We at the Hartford Foundation for Public Giving are midstream in our participation in EEI. However, we have a longer history of engagement with the Equitable Evaluation Framework™. Our journey involves fewer

chase scenes, but if we're talking in cinematic or literary terms, I might frame it as a relationship story or a long courtship.

I'll start by giving a general sense of the Hartford Foundation for Public Giving as a philanthropic institution. We have been the community foundation for 29 towns in north central Connecticut since 1925. In 2022, we distributed \$54.5 million in grants to nonprofit, government, and other community partners in the region. This is the largest total in our almost 100-year history. Our current strategic plan is centered on the dual priorities of working with partners to dismantle structural racism and to improve the equitable economic and social mobility of residents in our region. Our Learning and Evaluation team is relatively large, with three staff in a 60ish-person organization. The genesis of our L&E unit happened about six years ago at the behest of our then-newly named president and CEO, Jay Williams. The creation of the unit was not only to signal our commitment to data-driven philanthropy, but to further operationalize the development of the foundation as a learning organization. In 2020, we officially changed our unit's name from Research and Evaluation to Learning and Evaluation to center the responsive, knowledge-building, and developmental nature of our practice.

**Kimberlee:** The Oregon Community Foundation has a somewhat fabled origin story with EEI that involves a chase scene, tears shed (mainly happy ones!), and multiple twists and turns. This conversation comes as we transition from EEI practice partners to “practitioners” (we're all learning what that means as we go).

For context, OCF is a fairly large statewide community foundation, and 2023 is our 50th anniversary year. We distribute more than \$100 million in grants and scholarships annually and have one of the largest research teams among community foundations nationwide. This means that when we started our work with EEI, our leadership had already made a visible and tangible commitment to research and learning. The foundation had also made a public



commitment to equity and was working to figure out how to put that into practice.

For us, EEI came along at a beautiful time. Our Research and Learning branch was already on its equity journey, but this work helped give us the language, framework, and, in some cases, permission to lean into the EEF principles and approach, allowing us to be more ambitious and concrete all at once. Back in 2017, our senior research officer, Kim Leonard, chased Jara Dean-Coffey down a conference hotel hallway and asked how we could get involved after hearing Jara speak about this emerging work. We began a consulting arrangement with Jara to explore how to apply the emerging EEF to our evaluation and research portfolio. This evolved into a year of coaching conversations where we played and tried different things, including a tool, a case study exercise, and readings. Not everything that we tried stuck, but through this process we were able to better articulate our approach to research and learning. We joined the first practice partner cohort and now have “graduated” into being active practitioners. While there are times when it feels like we’re still at the beginning of this journey, we are continuously deepening our commitment to the EEF, and it’s hard to overestimate how much the EEF has influenced our practice. This dialogue with our colleagues reminded me of the importance of a values-based community and warmed my heart for reasons I hope will become apparent to readers, too.

**Kate:** The Hartford Foundation’s history with the EEI began with an informal phone conversation with Jara Dean-Coffey in 2018. We had heard of the EEI’s field-building efforts and believed in its relevance to the racial and social equity work we were trying to do as a foundation, including in our evaluations. Ultimately, while the call was thought provoking, we had too much to get in order before starting a formal engagement with EEI. However, that short phone conversation put in motion a series of unfolding relationships that have occurred in the intervening years.

In 2019, the foundation sent a community impact (program) officer and a learning and evaluation officer to the pilot Equitable Evaluation Teaching Case. This was a joint offering by the EEI, Grantmakers for Effective Organizations, and the Kresge Foundation, using Kresge’s FreshLo (Fresh, Local & Equitable) Initiative to explore how an evaluator, program officer, and funder could include EEF principles in the early phases of an evaluation. The foundation’s officers not only returned with new insights, but with exhilarating new connections with other practitioners similarly intent on integrating the EEF principles into their work. It was evident that part of getting ourselves in order was building relationships with others making their way through the work.

The excitement around these connections led to another phone call with Jara Dean-Coffey, which, in turn, resulted in the foundation’s five-person Community Impact Leadership Team’s participation in EEI’s Making the Case Collaboratory — a six-month reflective journey and situational assessment for the foundation staff to understand the EEF principles and assess the status of our existing evaluation practices and orthodoxies. We were getting serious, using the EEF principles and named orthodoxies to examine our underlying thinking and daily work alongside other folks in philanthropy. While this six-month engagement went by quickly, it was meaningful work that was deepened by the participation of a cross-functional team of grantmakers, capacity builders, and learning and evaluation, and leadership team members. Today, we find ourselves in the back half of year two of Class Four of the EEF Practice Partners working alongside critical friends at other philanthropic institutions, and we maintain cross-functional representation in our practice partner team (including one of our capacity-building and evaluation consultants!).

**Kimberlee:** As directors of our respective teams, Kate and I deliberately held back from participating in the conversation to offer our teams more space. We’ll be back after the conversation to surface reflections and some continued curiosities that emerged for us.

## Conversation

*Eight people appear in boxes on a Zoom video conferencing screen. It is late afternoon on the American East Coast and midday on the West Coast. People in attendance look attentive and eager for the conversation.*

**Elena Tamanas Ragusa** (she/her): I'm happy to be here with all of you to facilitate this discussion. Thank you for carving up the time to have this conversation about the Equitable Evaluation Framework™.

For me, facilitation means I'm going to get out of the way as much as possible, so you can engage with one another around this work. I will ask some questions and follow up as needed and move us along to other topics to ensure that we get to everything that we want to talk about. That will likely mean that everyone won't get to say everything they want to say around a specific topic. I may also invite specific folks to step in if we haven't heard their perspective. I also welcome all of you to help that happen by inviting one another, and by stepping back if you feel like you've had the mic for a little bit of time. In the article, we're giving folks a "pull the curtain back," behind-the-scenes view into the conversations, the realities, and challenges of doing this kind of work. Much like the work that we are doing, the intention for this conversation is that it is fluid. It is not perfect.

So, with that, why don't we quickly go around, and by way of introduction **please share, super quickly, something that you really appreciate about your work or your community.**

**Kim Leonard** (she/her): This is random, but there's a doughnut shop here with the slogan "community, not competition" and for me that's what being part of the EEI feels like. We're all in community together trying to advance everybody's everything, which feels really good.

**Maddie Nguyen** (she/her): I really love being able to learn so much and so often at this job, and with so many other people.

**Becky Seel** (she/her): Hi, everybody. I appreciate that every day feels a little different with projects and the people I get to work with; meeting folks in education, art, and talking with entrepreneurs about what kind of thing they're cooking up.

**Joel Hicks-Rivera** (he/him/El): Hello, the fact that I am from this community or raised in this community is what brings me joy, and the fact that I feel like I'm a representative of the community that we're serving. So that's exciting to me.

**Cierra Stancil** (she/her): What I appreciate the most is work in the community. In a lot of ways, the role that I'm filling right now feels like it was meant for me: as I developed, as a member of this community, and through both my personal and professional journey. To end up here at this moment, doing what I'm doing, is what was meant to happen. I know that's kind of heavy, but I do feel that way.

**Jean-Marie Callan** (she/her): Hi all. What immediately came to mind to me is our attention and commitment to slowing down and to pausing. I feel like pausing is a word that I use a lot, that our team uses a lot, and it's also something that's hard. I find it personally hard. So together, keeping attention on ways to slow down is something I really appreciate.

**Kelly Casey** (she/her): Hi, everyone; I would say the thing I really appreciate is when we get to co-create things together; whether that's internally with my colleagues or externally, I'm really grateful for that process. I'm grateful for the people I get to work with, some of whom are in this room now, and grateful that we get to sit together and have this conversation today.

**Elena:** I'm a consultant and I really appreciate getting to do the work I do. Who gets to sit here and have this conversation with all of you in the middle of a Wednesday afternoon? This is my job. So, it's pretty cool.

Alright, so the first question actually ties nicely to what a lot of you a couple of you started

talking about. **Why is applying the Equitable Evaluation Framework™ principles and challenging those orthodoxies important for your own practice and the work that you do?** Anyone that wants to start, go ahead.

*(Awkward pause while everyone waits for someone else to go first.)*

**Cierra:** I'll say that it's both key and at the crux of implementation. Meaning like the ways in which you're structuring, grant programming, and interfacing with the community given the current social climate and sort of where we are as a nation. I would say that it should be at the core of decision-making. [The EEF] is both broad and narrow while being complex enough to really give you something you can use as you're making decisions, or as you're reaching out to others to incorporate them in the decision-making for communities. This is your initial train of thought. This is where you should start, and this is what you should be thinking. It's pretty foundational.

**Elena:** I appreciate the framing of this idea as kind of simple and also pretty complex at the same time.

**Becky:** For me, the key word here is practice. It's stepping back and thinking about "Why are we doing this? Why did we start? How are we doing this?" Stepping back to give that grounding that Cierra mentioned — that bigger picture — has been really important for me. The EEF and sessions made me wonder: Why are we always taking written notes instead of graphic illustrations that are more approachable and memorable? And why are we doing so many presentations and lectures as a field, when we could be having rich conversations among each other? It's helping me be conscious about broadening the space and acknowledging who feels welcome.

**Kim:** For me it's foundational and very much about practice also. The framework names things that have been frustrating and uncomfortable and difficult for me for years, but I didn't have something to hold onto or to point to until this. There are other valuable frameworks for

*... Being able to think differently in a way that better reflects my own cultural values and the values that I know many people share, I think it makes more room for us to think differently and work towards different solutions that will give us very different results than what we've seen in the past.*

— Maddie Nguyen

Hartford Foundation for Public Giving

sure, but something about the EEF really challenges me in an ongoing way. Every time I look at the framework and the principles, they feel a little different, or they apply a little differently. That gives me ways to aspire to do the work differently. It meets a need I didn't realize I had in ways that are continuing to evolve.

*(Joel and Kelly come off mute simultaneously then jump back onto mute.)*

**Elena:** Go ahead. Joel and Kelly, whoever gets to it first.

*(They wave at each other to try to encourage one another to go. Kelly gives in.)*

**Kelly:** I'll be quick and then hand this to Joel. I think something that was so helpful is that we got to sit with these framework principles and orthodoxies often in a community of practice, and we would discuss whatever projects or questions or things that were coming up, either one-on-one or together as a group. Internally we would sit with it, and I think it just offered areas of consideration — not a checklist — but things that we needed to keep in mind. And what did

*Are things going to be fair and just? Probably not. But if ... we can find ways to find some sort of a balance in that, or at least engage in conversation, I think that's the work and we should continue to practice that.*

— Joel Hicks-Rivera

*Hartford Foundation for Public Giving*

---

it mean for that particular project at that particular time in that particular context? Whatever it was we were sitting with, being able to talk it through together and figure out a way forward was helpful. And I think we did that intentionally as a group on a number of projects.

What does this implementation actually look like, Joel?

**Joel:** Oh, thank you, Kelly. I was thinking much like the rest of you were thinking, but I started to pull out the word equity out of that, and then practice also came out, and I went into the space of thinking this work is never done. We're constantly challenging and asking ourselves, "How do we continue to look at this work that continuously evolves?"

And so, when I looked up the word equity, I saw fairness. I wanted to just pull up a real definition: fairness and justice. I think, for all of those reasons, this is why we're here. Are things going to be fair and just? Probably not. But if ... we can find ways to find some sort of a balance in that, or at least engage in conversation, I think that's the work and we should continue to practice that.

**Jean-Marie:** I love that, Joel, and that's part of where my mind was going too. What's so important to me about the framework — it's absolutely about that attention and

intentionality that I'm hearing in the conversation — but to me it's also about moving what are really hard systems to move. And when we care really deeply about equity and advancing equity in our communities and society, that requires working at different levels. Some of that is thinking about big policy change. Some is about things we can do that are more tactical within projects. But it's also about internal transformation and doing things that change the way that we're thinking and approaching things. To me that's part of what's really powerful and important about the attention that we pay to the framework in our work. It's the opportunity it presents, an invitation to think and show up in different ways — and in doing that, about really transforming things to be more equitable.

**Elena:** I'm hearing a couple of different themes that are bubbling up here: one is around the invitation that this framework gives us to change the way that we approach and talk about the work, and also at the same time the change that we're hoping to actually effect. It could be both of those at once, which is kind of interesting.

Kim talked about her training versus using this in her current approach. **How is this approach helping you, all of us, show up authentically in this work? Does it give you additional space to bring yourself to the work in a different way?**

**Kim:** Yeah, this is the part where I cry, probably, because this matters so much. I love the idea of the framework as an invitation. It also feels like permission, and a call to action. It makes it possible for us to try new things and to show up as our messy selves, who cry regularly or whatever. And that's OK, encouraged even. I think that's so important, because if we want other people to be able to live authentically, to be able to share their truths, we have to do that too.

*(Kim gets teary. People put up heart reactions.)*

That's so different from the way we were taught to be, right? We were taught, many of us, or myself at least, to be observers, objective data collectors, analysts, experts. Definitely not to let

people see the messy stuff that happens in the middle. That's scary, and I think doing that well requires being able to be yourself and create space for other people to be themselves, so that we're all able to contribute authentically. I see nodding, so hopefully that makes sense.

**Maddie:** All of those things. I feel like for me, I really get to bring my culture into it, my blended culture, not just for me. I'm Vietnamese by heritage but living in the U.S., I'm very much a blended multicultural person. And so, this framework allows more room for that, because in my training, too, I was taught, like you have to be objective and usually objective means being white. And so being able to think differently in a way that better reflects my own cultural values and the values that I know many people share, I think it makes more room for us to think differently and work towards different solutions that will give us very different results than what we've seen in the past. And that's incredibly exciting for me.

**Joel:** I really love that, Maddie, because I've never heard that. It does also allow me to bring all my full self, my messy self. I don't know all of everything that I still need to learn. And I'm not a trained evaluator at all — I didn't go to school for that. But I feel like throughout my whole professional journey, data evaluation was just this big thing and this anomaly that sat over there. It was just way too much to learn to understand, to use. Even before I came to the foundation, I started to get comfortable, really using data to make decisions, to learn about communities and to see the differences. And then, even being a part of this group, it's allowed me to even feel like it's OK to be messy. It's OK to bring all of who I bring in my multicultural self. So, I appreciate that.

**Kim:** Let's get real about how messy the data is too, right? We get to embrace that and still use it, to make sense of all the different kinds of information and hold it all as valid. I think that connects to what you're talking about, Joel — about being able to do the work. It invites more possibility, it's more welcoming.

**Joel:** Yeah, it makes me think about folks who are in this space and the language that they use that can be super intimidating, and I don't feel like we talk about data like that at our foundation. It feels very common, just to talk that way about evaluation. And it can sound very extractive to communities of color.

**Cierra:** Piggybacking off what Joel and Kim just said, about validity: I was glad when I got the opportunity to see what EEF was about and began to look into things and talk about the framework, having been in philanthropy for almost six years at that point, I definitely defaulted to these orthodoxies we're supposed to be challenging. I was just doing my job. When we started looking at these orthodoxies, I started to feel like some of the [nonphilanthropic] experiences that I've had out in the field — and we won't even talk about me as a human being — now feel as though they have validity. And I can use that information that I know to be true in a way that is beneficial for the broader community. It just sort of lit a fire in a very real way where it was like, "Oh, I'm gonna ride this wave, because it opened up a lot of doors and showed new opportunities and possibilities." So that validity piece has been pretty cool to use as a framing for things to implement.

**Kelly:** I think just speaking to what everyone is saying, research and evaluation — all of this is not neutral, and often has been harmful. And to what Joel said — extractive. I think it's important we sit in all of that, and the orthodoxies specifically. We went and we looked at them over and over again, because they can just carry on and kind of sneak back in with time pressure, with hierarchies of decision-making, with all these pieces, and consistently having them to go back to and sit with the work has been really helpful. And once again, looking at ourselves and kind of evaluating how we are doing the work, taking on feedback, and then implementing changes, to what Cierra was speaking to. Now kind of seeing how that process has played out, I think, it has been really, really important for us to sit with and reflect on.



**Elena:** I've been part of the Hartford EEI team, so I have a dual role here as facilitator and also a part of this work, and I'm going to share something that I guarantee you I will cringe at when I read the transcript later because I never would have thought that this would be relevant to this discussion, but I think it is connected. So, in my off time, I have been taking improv comedy training for the purpose of continuing to build that real-time ability to respond and help move people to consensus. And something I learned there is that the point of improv is not to be funny. That was clear right from the very first class. What they tell you is that the point of improv is to strip out that moment of thinking through saying it perfectly, saying the right thing, and instead being immediately authentic. And it's that authenticity — especially because we're not used to doing it day in and day out — that people respond to and find humorous. It's seeing someone have that sort of knee-jerk immediate reaction, showing "this is who I am, and this is my natural response to that prompt or that situation," that is really the root of what is happening in that space. And that notion is not what I expected coming in. As I pull up the EEI principles and orthodoxies and sit in these conversations, I think of that running line from my improv instructor in my head. And I'm reminded how hard it is to just react authentically in our work. Everything in my being tells me "No, don't say that. Don't do that. That's not the way to react," based on life experience, based on training, based on the professional hats that I wear. It's really, really hard to bring that sort of authenticity — to multiple aspects of life. I find that this provides a framework and some tools to remind myself of those opportunities, that it's OK and safe in some places to do that.

**Joel:** I am gonna say, just to give ourselves grace too. As a male person of color — I am always having to prepare to not be perfect, and to just make sure that I'm showing up in a certain way, so that folks see me as a prepared, intelligent man of color. I have to overcompensate in those spaces a lot. I think not only does [challenging] these orthodoxies kind of changes that for me, it allows me to just be messy — but messy in a calculated way.

**Elena:** I want to move us to the next question. But anything burning in people's minds first? Alright, so no smooth transition. We're just going to go there. **What does applying this framework and challenging these orthodoxies actually look like? What does it feel like in your work?** If people are reading this article and looking for concrete ideas to take baby steps or jump into the deep end, what might those be? Where is it easier? It's a big question.

**Cierra:** I have the orthodoxies printed out as one of my frequent reference tools. I keep it on my desk, and because I'm a grantmaker, it looks like looking at processes from beginning to end constantly and consistently and thinking contextually about all the beneficiaries: the broader community, those who are implementing the programming and those are participating in the program. Then it's looking at us and the things that we traditionally do to get in the way. For me there's just a constant reevaluation of how things were done and to whom. When I say process, I mean from beginning to end of experience. How were you originally engaged? What does the setup of the actual grant period look like and is that prohibitive?

And then thinking about my positionality. What can I do from my role to alleviate what's in the way? Now, here's the kicker, because, yes, I am thinking about how to alleviate it, but I'm also keeping in mind current systems and doing a weight balance of whether or not my idea to alleviate could actually make the problem worse. Broader change or bigger change — we all know that's gonna take some time. Both myself and the grantee have to continue to engage in current systems. That's just a reality. So, it's a constant assessment of process, beneficiary, the environment, and landscaping.

**Maddie:** Yes to everything, but for me it's still about giving back power to other people. As like an evaluator who got a fancy degree from Yale and has a lot of research experience. I know that there are a lot of assumptions and powers that I hold, and I feel like I have to keep pushing back — like, yes, I am in this role as an evaluator. Yes, I'm gathering a lot of information. Yes, I'm doing

a lot of digging, but ultimately this is in service for people. This is in service to the community, and I am merely a medium through which to help communicate what these values and ideas and goals and strategies are for the community. It's just really finding as many opportunities as I can to push back on these traditional ideas of what power it looks like, and who it should belong to.

**Kim:** A couple of things are coming up for me. Cierra, you talked about all the questions that you ask yourself, and I feel like we are working really hard to ask better questions in all the work that we do. Where can we shift the burden? What should we be paying attention to — is it what our grantees are doing, or is it what we're doing? Where's the locus of control, and how can we focus our energy on asking questions about what we can change, what we can do better? And Maddie, I appreciate you talking about your role. For me, a lot of this is reflective practice about the way that I show up in the work, and the way that I do the work. I tend to talk a lot, to take the lead readily. Where can I sit back? Where can I cede something rather than control it? Where can I facilitate something rather than own it? Like you said, it's power shifting, but it's also just like, where can I just show up in a different way that's probably more helpful than what my tendency might have been. Sorry, Jean-Marie, you unmuted, too.

**Jean-Marie:** No worries at all. The very first word that occurred to me about what it feels like is “swirly.” And that's a word I've been using a lot for a variety of reasons. But one reason is that there's a lot to think about and hold practicing the framework. I think I heard that in some of the other reflections, too. It also looks really adaptive, thinking about adapting to what's happening and to the people that we're working with. And it's taking those pauses and slowing down. Those are some of the qualities of the work. To make it a little bit more concrete, in one of the particular projects that I'm working on — which is looking at the current sort of state of things in Oregon (that's a very short way to put it!) — we're really looking at the questions that we ask in a different way, building off of

*What has been the easiest for me is taking personal responsibility for the framework. The principles are really genuinely trying to ground myself in what I do in alignment with trust-based philanthropy and can do to model those behaviors in front of others. I am doing this work differently than the way that I've done it before.*

— Cierra Stancil

*Hartford Foundation for Public Giving*

what Kim Leonard said. We're thinking about asking questions about systems and looking at “system indicators” rather than “people indicators.” And what can we really examine in a different way than we have before? How can we ask the questions a little bit differently, so that we're getting to different things? And then it's also how we're answering those questions.

We're thinking about taking the process a lot slower, which can be uncomfortable. And we're finding ways to invite others in with us along the way. Sometimes that means, you know, needing to take things pretty slow. That can feel like I'm not doing as much as I'd like to be doing or not making as much progress as I'd like to make. But it's really important to be approaching it that way. And it takes lots of different forms in different projects. This sort of bridges to the question about where it's more challenging and where it's easier. Often I find it's a bit easier where there's more guardrails or constraints on a project versus places where we have more open canvas to play. Those can actually be a bit more challenging for me to figure



out what to do, what to focus on, and how to sit in that swirly space of practicing and trying on lots of different things at the same time.

**Joel:** I think about how we're not the experts — asking ourselves lots of questions before we ask others. Are they our partners' questions? I love ideating, and just getting together and asking so that we can get to a place where we're asking really thoughtful questions, seeking to understand, and getting out of the way. And then understanding your own power, which is what I believe Cierra was talking about in her role. I think building trust, and having honest and transparent conversations, has been really helpful in this space.

**Becky:** On that note of getting out of the way — there's this idea that the conversation around the data is more important than the data itself. Who needs a 20-page report when you could spend an hour or two talking with people about a single number? Some people might think that percentage is worth celebrating and others are thinking, "man, we've got a lot of work to do." It's that slowing down piece. To be honest and build trust.

I'm also thinking about the improv that Elena mentioned. One of the things that I get really excited about is using creativity or art or games to prompt people in a different way. It gets us thinking differently and dusting off parts of our brain that are less about logic and rationality. It shakes up the power dynamics when you're passing a ball around someone with a lot of education doesn't know if they're going to catch the ball (that's me). Whatever position you have, whatever expertise you think you might have, some of that falls away in favor of something unexpected. Those are the approaches that I get excited about and want to welcome.

**Elena:** I'm wondering how folks are working through this process of balancing what could be an additional burden by inviting others in and slowing down the process, with the space for other perspectives. **How do we strip away some of our power based on our positionality? What is your current experience? Where have you found some "success"? — I say this with quote "success" there — or some challenges, or what are you grappling with?**

**Kelly:** I'm gonna also invite everyone on our team to speak to this, because everyone was involved in different ways. But the first thing that came to mind is Process Redesign,<sup>3</sup> which is an internal project that we did to look at all of our systems. And we wanted to, in each situation, ask: How are we redistributing power? How are we thinking about burden on grantees and on staff? We had a lot of thoughts and understandings from what grantees had said to us, and a lot of assumptions about how things were sitting with folks.

But [for the foundation's grants process redesign project] we also needed some additional information, and we did go and collect information from 146 grantees. I think it was 16 grantees who also participated in reviewing the application specifically, because that was an area where grantees had feedback, and we wanted to roll out a revised version with them. I think it's about being really intentional when we are going to ask for input because it can be burdensome, right? We want folks to be included in decision-making, to be aware of that power. Even when we're asking questions of folks, there's power dynamics in that, and how we're asking, and what we're asking, and how we're using that information. I think it's part of an effort to make our thinking visible internally and externally. The information that we collected, we used it to redesign our processes and we also use it in all sorts of ways internally.

<sup>3</sup> Note from Kate: Process Redesign was a special project implemented at our foundation to overhaul our grants process. It centered reducing grantee and foundation administrative burden, elevating and foregrounding trust of organizations in the grants process (challenging the EEF identified orthodoxy that trust/relationships come from doing the work, but are not the starting point), and improving grants data quality so the foundation can better keep itself accountable to equitable and trust-based practices (challenging the EEF-identified orthodoxy that grantees and strategies are the focus of the evaluation, but not the foundation).

When questions come up about topics, we have that information from grantees that we can turn to. I think it's also compensating people for their time and labor, because they're providing their expertise and experience. I think in that project specifically we had to sit with all the orthodoxies and time burden, and also wanting to design systems in a way that honors what staff and grantees needed, because once again we have a lot of barriers in place.

**Cierra:** I'll say it's like somebody turned on a flashlight to illuminate issues with our own internal processes in the way that we're operating and functioning. As we were trying to implement [process redesign], it felt like there was a barrier to being able to answer something grantees elevated as an issue. The grantees would say "this is an issue," and immediately after at a meeting with staff we'd be looking at the feedback and, it's like, "Well, we do this to you because we're doing this to each other [philanthropy as a field]." It's a balancing act. I would love to remove this barrier for you, but I've already made the determination, based on our own internal processes, that removing that barrier for you either might not get the result that you're looking for, or I might be so burdened throughout the rest of the process that you would feel negative effects, whether it's getting the money to you later or whatever it is. There's always that calculus at that end of it. It just adds an extra layer. I guess if we're gonna talk about how difficult [the framework] is to apply? There's the issue that this individual [grantmaker] has gone through a transformation, has seen the light, and said, "We shouldn't be doing this." But you work within a system, and by the way, so does the grantee. And so how do you balance this? You're working on getting the best result.

**Jean-Marie:** Another example from a different space in our work is that we've been engaged in starting up an advisory group — or we're actually playing right now with calling it an "advisory partnership" instead. We're really thinking about how to construct it in a way that has mutual benefit for our team and the folks who join us, too. So as part of that we're

planning to financially compensate folks who participate. But we've also been having a lot of conversation about what the benefits can be of participating in a group like that. We're trying to articulate benefits for ourselves and for others, and what the reasons are that folks might want to join in that work with us. And we've been doing that in a way that we are co-creating with some fantastic folks who have joined sort of an early version of what that might look like. We're thinking together about designing it. And with that group, we've been coming up with things like building relationships being a key thing that comes out of that space and the opportunity to engage in some learning that's meaningful for everyone's work. As we identify those things, we're thinking about ways to design the "advisory partnership" so that it has those mutual benefits that help balance some of those different burdens.

**Kim:** I feel exceptionally aware and fearful of burdening others, and I wonder if sometimes we use that as an excuse too. Could we try harder to make sure that it's not a burden? If we want to invite folks to do sensemaking with us, when do we avoid or minimize that engagement because it's hard to figure out how to make it worthwhile for others, or reciprocal? It's hard to figure out how to compensate people well for their expertise and time. But I think it's possible and that's one of the things I'm most excited about in the future. Can we work through those worries and figure out how to do more power-sharing, participatory work?

**Joel:** Kelly, you might be able to help me out a bit. The first example that came to my mind was, we're working with a group of school districts [on an evaluation and learning project] and we really wanted to co-create with them and to be very inclusive, and to really bring them into the fold. We also have an external evaluator that was hired that we all have a wonderful relationship with, so it's an amazing team. The district leaders love the team. We all are working really well together, and we get to the session of "let's co-create the learning questions" and it became very burdensome for all of the district leaders. It was well intentioned, and we were really

*One of the things that I get really excited about is using creativity or art or games to prompt people in a different way. It gets us thinking differently and dusting off parts of our brain that are less about logic and rationality. It shakes up the power dynamics ....*

— Becky Seel

*Oregon Community Foundation*

---

wanting to co-create, and so it took us a little minute to pivot in vivo. We don't have to go there; we can go another direction. Eventually we got to listening to what they were saying, and it was that they're so burdened with all of the current work, to think about these higher order kinds of overarching, learning questions across multiple districts. It just it wasn't for them to do right then and there. So, they had asked us to go back and present something that they can react to. I think you know we try to do the right thing at times, but I think also reminding ourselves in person that well, maybe we just need to pivot, and sometimes to stop.

**Kelly:** Completely agree to all that Joel said. People's plates are overflowing. They have so much work, and if it's not something that's going to feel meaningful to what they're doing, what is it for? I think we need to unpack what burden is, and how it sits with people and what feels burdensome and why.

Because if learning questions feel completely divorced from the work, then it's not going to feel meaningful, right? Where are you at? And what do you need to move forward? What does that look like? Understanding that, and then working backwards into a learning question that we can collect information around to support

district leaders (the example that Joel was speaking to). That's so important — checking with folks before making decisions. Sometimes we just make a decision, and there's also power in that. Just being, like, we're not going to co-create with folks because it takes time to think about it meaningfully. To Joel's example, understanding where people are at, pivoting, and working together to co-create something in a way that feels meaningful for folks: It does take intention and more time, but it makes the work more meaningful and actually useful and not something that's just gonna sit in a paper that no one touches and isn't going to do anything for anyone.

**Kim:** I love all this, and it makes me think about abundance [as opposed to scarcity]. We sit at foundations, so we have a lot of power theoretically, or our foundations do. We have a lot of resources; we have control over timelines. How can we take an abundance mindset and make it possible? Unpack the burden, as Kelly said, meet folks where they are, make it meaningful to them. That's a real challenge but I feel like it is possible. I also have Jara [Dean-Coffey] in my mind, asking, "What's one small step you can take now?" That reminder that we don't have to do it all immediately is so helpful. The pivot that Kelly and Joel describe is such a great demonstration of what's possible. You switched it up when you needed to, and that's hard to do in the moment.

**Maddie:** I'm thinking about burden, too, I try to remind myself that we see a lot of different types of individual burdens. I guess, just reminding ourselves that many of the burdens that our grantees are feeling stem from systems and trying to find out: What are the roots of these burdens? How can we undo some of those intentional structures so that the burden is less than, and they have more room to dream about a different future and a different path for that future.

**Becky:** Yes! That dreaming space and the idea of abundance just feels so good! How can we support that? We're trying to provide more open, unstructured space for people through a

monthly meeting we call Breakfast Club. We bring a topic, like trust or supporting each other in relationship building, and the conversation goes from there. And with the advisory group that

Jean-Marie mentioned, we want to include open time for advisors or partners to talk to each other about what's going on, and for them to fill in around what they care about. It's a balance of creating some structure and bringing openness, with hopefully a little bit of dreaming.

**Elena:** Before you transition, I want to try a really quick little experiment. We'll see how this goes. In the spirit of celebrating small wins in community work, I'm wondering if there are any parts of this work that you're doing now, as it relates to challenging the orthodoxies, applying the Equitable Evaluation Framework™ principles that have felt relatively easy? You could just unmute and throw it out if there are any.

**Joel:** Something pops up for me with the [school] districts. So, when I came to the foundation, I was given alliance districts to work with, and we are working with six of them. These are legacy grants, so they've been around for way longer than I have been here at the foundation. You can imagine the trauma that they've experienced. And so here I come, and I was, like, "Well, you're the experts, you tell me what you need, and I'll see if I can facilitate that." That little nugget flipped the work. People were saying, "Oh good job, Joel," and it wasn't about me. I didn't do anything. I just gave them the space, and they did all the work. And so I think that was a little nugget that I felt to me that's tangible, that I've seen while being here at that the foundation these last 18 months.

**Elena:** Thank you for that. Any others before we transition?

**Kim:** A lot of this is about relationship building, right? Within the EEI community, it's been really rewarding to be able to have conversations with folks at other foundations and understand what it looks like elsewhere. There's camaraderie, validation, and support there. That

has felt in some ways easier than other things. Really being able to center relationships with other human beings. Joel, I think your example is a little bit about this, too. We started an evaluation a couple of years ago and the program officer was the one to say, "Before you do any evaluation work, spend at least a month getting to know people." She encouraged me to deliberately take time to start relationships before we dug into the evaluation. I had to resist putting on my interviewer hat, but that felt like a huge win, and it has paid off in the ability to have hard conversations with people. And it wasn't that hard to do either.

**Joel:** I'm glad you said that because it was all really relationships, honest authentic relationships, trust building and sharing a little bit of your own self and your own vulnerability. I think magic can be done when people are trusting each other, and they build trusting relationships.

**Kim:** Yeah, I love that, and I wanna qualify that. I said it's not hard to do, but it actually is hard to do, but it's also not hard to do, if that makes sense? It takes time. It takes the intention, and not everyone is an extrovert, right? Sometimes it's hard to create relationships with people you don't know.

**Joel:** Yeah, and I don't think you need to be an extrovert. I think you just have to be honest and authentic, and then know who you are, and that's the hard part, is knowing who you are and how you show up in space. And if you haven't gotten that, forget it.

**Cierra:** What has been the easiest for me is taking personal responsibility for the framework. The principles are really genuinely trying to ground myself in what I do in alignment with trust-based philanthropy and can do to model those behaviors in front of others. I am doing this work differently than the way that I've done it before. There's a lot of individual work that goes into being able to do something authentically. Yeah, that takes years of work. But in a very real way, taking responsibility for what you're doing and your piece of things, I actually

found it grounding, because the work is so, somebody earlier used the word “swirly.” What you stand 10 toes down on is your own personal responsibility for your role in the way that you go about things.

**Kelly:** I’m gonna go off what Cierra said, about that personal responsibility piece — and having colleagues, having a team committed to the work, and knowing that no matter these are things that we’re going to move forward like we did for a team that we sit on together. We gathered feedback on a community organizing and community engagement RFP process. We gathered feedback from grantees on our Civic and Resident Engagement Team logic model. And it takes time, but having people committed and taking responsibility and saying: “Because of the values we have set out for ourselves, these pieces are really important, and therefore we’re committed to doing them.” That piece is easy, and then the implementation of it is where some of these complexities and sticking points and other pieces can come out.

**Becky:** On that thread, Cierra, of personal responsibility — for me, it feels natural to acknowledge where I make mistakes — that word feels so heavy! But the bigger idea is that we’re not expecting perfection and to normalize mistakes in living and learning. That’s something that I try to acknowledge and make more visible. With my team, I have a lot of mistakes to share! It takes trust to do that though.

**Elena: So where do you hope to go from here? What does applying these principles look like for you in the future?** Either short term, or, if you want to be ambitious and talk longer term, more than just the next six months or next year or two.

**Joel:** Talk about slowing things down, right? So at least for me, I’ve spent almost 19 months with this material. And you know, any change is gonna have its own process. It’s not always linear. I think for me, just really continuing to engage in these conversations. I’m continuing to engage other members of the foundation in this process, and reminding myself constantly

that I’m not perfect, that I am full of mistakes, and to give myself grace. But I think this work never ends. I think it’s continuous connection, continuous conversation.

**Jean-Marie:** Yeah, I come back to the idea of practice, and that’s something that feels really helpful to think about when talking about this work. When I think about the future, I think of an analogy of other places where I’ve practiced something. I think about when I was a kid — and this didn’t stick so it might not be the best example — but I learned how to play the saxophone. And you know there’s different phases of practicing something. There are parts where you’re paying attention to all the things, and it can feel like, you know, not very second nature. And then it develops over time. I think my hope for the future is to continue along that path of practice with an understanding that it doesn’t end. As Joel said, it’s gonna be a lifelong practice. But my hope is that it feels different in the future, and that I’m able to practice in a different way as I move forward in the work.

**Maddie:** I think one of the things I would like to do in moving forward is continue incorporating more Indigenous ways of thought and knowing into the work and into the foundation’s framework. Right now, the Hartford Foundation just looks so much more diverse than it’s ever been, and I think that means that we have to change how we’re thinking about things, and how we’re approaching it. Like, one specific example I’m thinking of is this approach called two-eyed-seeing. It’s basically a way of thinking about one subject from multiple perspectives based on the different roles that you hold in your own life, and the different types of ways of thinking that you hold especially for people who come from multicultural backgrounds. There’s the thought that they’re always competing with each other. So, I think, being able to bring that more fully into our space would help people feel like they, too, can hold power over how they learn and how they decide to move themselves through this work, so that’s with that giving people back the power that they have always held.



**Becky:** That's so beautiful, Maddie, and really inspiring. It makes me think of something I read from Robin Wall Kimmerer [member of the Potawatomi Nation] about the limits of nouns in English — like the word “bay.” In her native language, a bay is a verb [wiikwegamaa] — to be a bay. The boundaries of a noun can be limiting. There are so many ways we can learn from each other and different ways of knowing. Expanding beyond the head to the heart as well.

**Elena:** What do others think? **Where do we go from here? What does this look like in the future, either for you individually or for your organization?**

**Kim:** We're shifting into practitioner mode technically with the [Equitable Evaluation] Initiative because we were part of the first cohort, and we're figuring out what that means. So that's part of our future. What does it look like? What do we still need from the initiative team or from the amazing group of foundation colleagues? But I mostly hope we don't forget to keep paying attention to the small stuff, or the seemingly small stuff. Jean-Marie and Becky, you've talked about practice, and it brings me back to the notion of what small things we can do today or tomorrow. It doesn't have to be all about gigantic moves or leaps to sort of make valuable change. I just want to hold onto that going forward.

**Kelly:** The thing that also came to mind is something Cierra was speaking to before — the distinction of the things that we can do now and things that we cannot yet do but can't unknow. And then how do we bring those pieces forward. Part of that will be bringing along people for that — expanding those that are involved. And, Maddie, as you spoke to ways of knowing and perspectives, and as Becky and others have spoken to, that imagination, and thinking about what's possible. That's gonna involve culture shift and a dismantling of systems. And holding each other together in that will be important. As always, these conversations have been so fruitful and have left us with a lot to consider as we move forward in this together.

*Everything in my being tells me 'No, don't say that. Don't do that. That's not the way to react,' based on life experience, based on training, based on the professional hats that I wear. It's really, really hard to bring that sort of authenticity — to multiple aspects of life.*

— Elena Tamanas Ragusa  
Drive Evaluation Studio

**Elena:** Kelly did such a nice job of summarizing. Thanks, Kelly. **Let's open it up for any additional thoughts, reactions, or things that you're feeling right now.**

**Joel:** In all of our conversations I kept thinking about how in this role there is inherent power that we have, and then I think about the minute that I walk out of these doors of the power that I don't have. That duality of who I am as a Latino male, with all of my identities, and what I bring to the table, that struggle that I internally have with all of this.

**Cierra:** To circle back to something that you had said earlier, Kim, about abundance. My observation of the internal culture of various philanthropic organizations, is that staff and other parties, who are all the while observing the needs and conditions of the “have-nots,” will operate as though they are suffering from the same lack of and need for resources. There's such an interesting duality there because Kim is right about the abundance of resources. How does that cause us to treat grantees, and sometimes even the community?

**Kim:** I so appreciate that, Cierra. I also was in my own head while we were talking about abundance and burden, thinking what a place of privilege I'm in to say that. I recognize that we have colleagues who can't operate that way, or not transparently, because of a variety of things — identity, role, tenure, the foundation's stance, all the things. I can say that here with you all as a sort of call to action for all of us, but that doesn't mean that in reality it plays out that simply at all. Yeah, thank you, Cierra. Reminds me again how for me these conversations are part of the work, and I draw so much energy and inspiration from what you all have shared. I just deeply appreciate it, and I hope that this conversation is a great catapult for us to have other conversations about other things, including abundance and some of the work that you all have been doing.

**Elena:** Any other thoughts?

**Maddie:** Yeah, I have to actually hop off. This has just been circling my mind for a while. I feel like we are so focused as evaluators — I say this very broadly — on just collecting knowledge. And we forget that knowledge should always yield to wisdom. And if we're not working towards understanding wisdom, then what's the point of collecting knowledge? And also remembering that everyone, every person has always been an evaluator. And so, what are we doing then, to find collective wisdom? So, peace! *[Maddie holds up one hand in V or peace sign as she exits the Zoom room.]*

**Elena:** Thank you, Maddie. Other thoughts swirling in people's minds that may or may not be connected to previous conversations? What's at the front of your mind right now?

**Cierra:** Everybody on this call is educated in many different ways and to do this work you're drawing from your life before that and from your professional experience. You are being asked to step outside and beyond things that are happening on its face. I think it's OK to express that sometimes that can make you tired, even if you can see the benefits of it on the other side. It's why I won't stop. I'm not gonna stop, but

it's okay to acknowledge a certain amount of fatigue. Being this thoughtful and deliberate with the things that you're doing and saying and especially because all of us are adopting old systems and are looking at systems that work together — is not easy. Hartford Foundation is an almost 100-year-old foundation. It took a long time to get here and to be unweaving things as quickly as we're trying to — that's a lot.

**Elena:** "Messy" was the one [word] that I kept hearing. That reminder is really, really important here, so it's a good note to go out on.

I just want to thank everyone for the time that you took not just today and not just for the work that you're doing, but the added work of reflecting because it is a lot. So, thank you for your thoughtfulness and for your candor. With that, I think we're done. Have a good rest of the day.

*The people in the Zoom room smile, nod, and thank each other. Thanks are given to Elena for facilitating the conversation. Folks wave and exit the videoconference.*

## Reflections on the Conversation

**Kimberlee:** As I absorbed this conversation, several things occurred to me. One is the graceful grounding that the EEF provides. It was able to seed a layered, vulnerable, organic conversation between two teams on opposite coasts who have virtually no experience working together, but nonetheless were able to show up and step into brave spaces as a group. That is a testament to how the EEF knits people together and provides a welcome mat to explore, be messy, and show up authentically to this work. The excitement, camaraderie, and affirmations being built here in real time are infectious and serve a reminder of how necessary and sustaining these conversations are between practitioners.

**Kate:** Conversations like this demonstrate that equitable evaluation is not, and should not be, lonely work. Applying the EEF is a relational experience. Engagement with the principles and confronting orthodoxies requires examining and unlearning centuries-old practices that are rooted in white supremacist systems and beliefs.



We need peer support and an array of perspectives from colleagues and partners to turn over rocks, untangle knots, build bridges, and make our way down a winding path. Showing up in EEI opportunities and conversations like this one has helped me realize that people committed to this work are more than colleagues — they are partners, allies, co-conspirators, and teachers. Equitable evaluation is a connective tool. By lifting up the value of community knowledge and critiquing the orthodoxy that credible evidence comes from quantitative data and experimental research, the EEI connects work in the social sector to a vast and frequently ignored pool of knowledge, ideas, and learning that exist in community.

**Kimberlee:** Like good conversation, this one left me with more questions than answers. I am sitting with three questions to wrestle with, both in our practice at Oregon Community Foundation, and personally in my role as director of research and learning:

- First, how do we reconcile our desire to model an abundance mindset with the reality we operate within a grantmaking system that reinforces the scarcity mindset through our very grantmaking practices?
- Second, how do we effectively infuse this approach into more aspects of the Oregon Community Foundation's work?
- And last, but certainly not least: how do we balance burden and perspective? How do we create the space for folks to participate in a way that honors their involvement and makes their contributions meaningful?

**Kate:** I'm asking these questions:

- How much of the upholding of principles and challenging orthodoxies is done by ourselves versus in systems? Who is accountable for making progress there?
- How can we encourage ourselves to see beyond the binary of lived experience versus professional expertise — to an integrated

perspective that these forms of knowledge and skills can inform and improve the work?

- Also, in realizing that this work is never done and that maybe we won't live to see the ideal, how do we recommit each day to ourselves to ourselves and each other that it is very much worth trying and making the progress we can?

**Kimberlee:** I am left feeling grateful for this work, for my colleagues, and for the questions.

**Kate:** Whether it's intended or more of a positive externality, EEI seems to create a sense of profound gratitude. I share that!

## Acknowledgments

We owe a huge debt of gratitude to Madeline Brandt from Oregon Community Foundation, whose magical and insightful writing and editing skills crafted this submission.

**Madeline Brandt, M.P.H.,** was a research and learning officer at the Oregon Community Foundation and is now an independent consultant.

**Kelly Casey, M.Phil.,** is a senior learning and evaluation officer at the Hartford Foundation for Public Giving.

**Jean-Marie Callan, M.P.A.,** is a senior research and learning officer at the Oregon Community Foundation.

**Joel Hicks-Rivera, M.S.,** is a senior community impact officer at the Hartford Foundation for Public Giving.

**Kim Leonard, M.P.A.,** was a senior research and learning officer at the Oregon Community Foundation and is now principal & founder of Leonard Research & Evaluation.

**Madeline Nguyen, M.P.H.,** was a learning and evaluation officer at the Hartford Foundation for Public Giving and is now an independent consultant.

**Elena Tamas Ragusa, Psy.D.,** is president and founder of Drive Evaluation Studio.

**Cierra Stancil, M.A.P.P.,** is a senior community impact officer at the Hartford Foundation for Public Giving.

**Kimberlee Salmond, M.P.P.,** is director of research and learning at the Oregon Community Foundation.

**Becky Seel, M.P.H.,** is a research and learning officer at the Oregon Community Foundation. Correspondence concerning this article should be addressed to Becky Seel at [bseel@oregoncf.org](mailto:bseel@oregoncf.org).

**Kate Szczerbacki, Ph.D.,** is director of strategic learning and evaluation at the Hartford Foundation for Public Giving.