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Learning, Unlearning, and Sprinkling In: Our Journey with Equitable Evaluation

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Keywords: *Equity, evaluation, Equitable Evaluation Framework™*

Introduction

What do we really know about the progress philanthropy is making in our communities? How do we explain that change to our boards? And how do we honor the personal experiences of the people we serve and our own values during that process?

These are questions Health Forward Foundation has been exploring as we have recently completed a two-year journey with the Equitable Evaluation Initiative as a practicing partner. This partnership provided us with support to push for change that better aligned with our new purpose, which prioritizes racial equity and economically just systems.

While we were entering a relationship with EEI, our organization was also undergoing immense change. Our board was searching for a new CEO, one who would center equity in all of our work. This shift was somewhat of a natural progression from past work, but still represented substantial change. How that change would be operationalized, and what it would mean for both staff and our community, was also unclear. As a result, uncertainty and some degree of anxiety were common during this process.

In this article, we reflect on our journey with EEI's Equitable Evaluation Framework™ and describe a current project. Stories in Power, where we have experimented with some of the key concepts.

Overview and Perspectives

Health Forward Foundation is a regional health conversion foundation that was incorporated in 2003. Our current corpus sits at around \$925

Key Points

- The Health Forward Foundation recently completed a two-year journey with the Equitable Evaluation Initiative as a practicing partner. This partnership provided us with the support to push for change that better aligned with our new focus, prioritizing racial equity and economic advancement.
- The partnership also allowed us to explore a number of questions fundamental to our work in learning and evaluation: what we really know about the impact philanthropy is making in our communities; how we can explain that to board members, and how we honor the personal experiences of the people we serve.
- In this article we discuss our journey with the initiative's Equitable Evaluation Framework™ and how we experimented with some of its key concepts through a project called Stories in Power. A collection of voices detailing how members of a community have experienced their own power — or their lack of it — in making decisions that affect their lives, Stories in Power provided a concrete example of how our work can be different and helped us to lay a foundation for new ways of thinking about evaluation.

million and serves communities across a concentrated geographic area in Kansas and Missouri. Our service area encompasses six counties and includes both urban and rural communities, most of which are in the Kansas City metropolitan area. Since we began grantmaking in 2005, Health Forward has provided leadership, advocacy, and resources to tackle the pressing health issues facing our communities.

[O]ur grant cycles were tied to detailed theories of change, and we asked grantees to align their work and report their outcomes to fit that model. Our reporting process allowed for some narrative beyond metrics, but it still felt like we were missing the mark in truly being able to discuss results and tell the story of our partners' work.

In 2021, Health Forward underwent a strategic planning process that re-examined our impact on the health of our communities. In January 2022, we announced a five-year strategic plan (we call it our purpose plan) that recast our leadership, advocacy, and resources to advance and promote health equity through initiatives focusing on racial equity and economically just systems. This new purpose plan resulted in not only strategy shifts, but also changes to our grantmaking model and many operational aspects. Teams were restructured, new positions were created, and there was a greater emphasis on impact investing, strategic communications, and data, research, and learning.

This article is guided by the individual perspective of Jane Mosley, the primary writer, with significant contributions from Leigh Quarles and Jason Williams. Given the personal nature of the reflection, we want to introduce ourselves.

Jane Mosley is the director of research and impact learning at Health Forward. She has a Ph.D. in sociology and previously worked in academic settings. She has been at the foundation almost 17 years, having joined it in its infancy. While she writes this as a representative

of Health Forward and its staff, the singular first-person pronouns that follow throughout reflect her personal thoughts and experiences, not those of the foundation or other staff.

Leigh Quarles, an impact strategist with the foundation's People team, joined Health Forward four years ago as a program officer. She has spent the majority of her career working in academic medical centers where she was engaged in public health research.

Jason Williams, a principal impact strategist for the foundation's Power team, joined Health Forward in 2019 as a program officer. Previously a grantee of the foundation as leader of a grassroots organization, Jason brings lived experience of our communities of focus and is dedicated to centering the voices of those our work aims to impact. Jason and Jane were the two foundation co-leads for the Stories in Power project, which is described in depth in this article.

Evaluation Evolution

Our organization has undergone many changes over the last 18 years. What has not changed, however, is our belief that diversity is crucial to achieving our mission and goals. Since inception, Health Forward has intentionally sought diversity across our staff, governing bodies, and in our grantees. While cognizant of racial diversity, we also recognized the importance of operational-size diversity from our grantees. We've offered technical and financial support for application preparation to small nonprofits that may not have the operating budget for a grant writer. Further, we have worked to be conscientious of the innate power dynamics between funders and grantee organizations. Our philosophy has always been to partner with our grantees, recognizing that they are leaders with a close and unique understanding of their communities.

However, that philosophy has at times conflicted with more traditional notions of evaluation. While equity has been infused in our foundation, most notably in grantmaking and operations, our evaluation and learning processes have often been viewed as separate and distinct.

This is in line with experiences across the field (Grantmakers for Effective Organizations, 2021). The importance of using an equity lens in our evaluation has been less understood and undervalued by both our staff and governing bodies.

While we've aimed to work with — not dictate to — communities, we've asked for data counter to that approach. For several years, our grant cycles were tied to detailed theories of change, and we asked grantees to align their work and report their outcomes to fit that model. Our reporting process allowed for some narrative beyond metrics, but it still felt like we were missing the mark in truly being able to discuss results and tell the story of our partners' work.

Stewardship is a key value in philanthropy, and questions around it often found their way into evaluation discussions. No board or staff wants to waste money. Our grant record is solid: after more than 18 years of grantmaking and more than 1,000 grants, only a few have been canceled or not fully paid due to problems with the grant. It is exceedingly rare that we experience compliance problems — and yet, a preventive mindset can seep into what information we seek and how we ask for it. Philosophically, it's critical to separate compliance from learning.

Conflicting philosophies have repeatedly surfaced around the best way to measure our “progress.” The issues we were addressing were complex, which made it difficult to distill everything down to a few data points. Long narratives weren't always conducive to illustrating the small but meaningful change our staff saw through regular interactions with our partners. Like our peers, I often had to navigate the balance of responding to board inquiries about the “impact of our funding” without overburdening grantees to track results in a narrow, rigid, and unrealistic fashion.

In no way do I mean to diminish or devalue our past practices. The reality is that we all exist

Philosophically, it's critical to separate compliance from learning.

and operate within a philanthropic structure with good intentions, but one also influenced by its origins and history (Dean Coffey, 2018). As a recent reflection notes (Solorzano, 2023), mainstream foundation evaluation had a few central tenets:

- The main audience for their evaluation work are board members and leaders who want to see “proof” of impact.
- Traditional ROI approaches from the business sector bled into philanthropy, as leaders from for-profit businesses transitioned to roles in foundations.
- Evaluation and learning can be defined narrowly, based on white-dominant frames around impact,¹ such as funder-driven metrics.

Part of a change in mindset requires each of us owning our own part in the work and acknowledging that our actions have at times fallen short. We must be open to new ways of doing things. It takes humility for boards and staff to acknowledge we cannot alone solve problems.

Early in our tenure, after presenting at a board meeting, I remember a conversation with a board member who graciously offered to advocate for expanding our evaluation budget to solve the challenges in determining our impact. While thankful, I explained that the barrier was not simply insufficient funds. The complexity and longitudinal nature of the work would always make it difficult to draw a direct line from our funding to any one change. Like many board members since, he was open

¹ The EEF practice encourages terms such as “indicators toward progress” as opposed to “impact.” However, the latter term is common within our foundation and even noted in many of our titles. Thus, in this article we use “impact” in quotes, acknowledging that language is still an area with varied internal perspectives.

This framework stresses that implementation will naturally vary by organization and the communities they serve. It is up to each foundation to determine an authentic path forward.

to the conversation and shifted some of his thinking. We also had leading thinkers such as the Center for Evaluation Innovation (CEI) do several projects with us and share the results and approach at board meetings. Board members often attended Grantmakers In Health and Grantmakers for Effective Organizations meetings and sessions to learn how the broader field was changing regarding evaluation. Over time, individuals on our board began to shift their thinking from attribution to contribution.

Equitable Evaluation: The Meet and Greet

My first exposure to equitable evaluation principles was at the Midwest Funders Equitable Evaluation Peer-to-Peer Collaboratory in fall of 2019. This “making the case” convening, hosted by the Missouri Foundation for Health in partnership with EEI, brought together Midwest-area funders interested in exploring the tenets of equitable evaluation.

At the end of the convening, my reaction was twofold: First, we are doing this ALL WRONG. I had been in the philanthropic evaluation space for well over a decade and was now sitting with my head in my hands wishing I could have a do-over. Should I tear down everything and start from scratch? Second, these new tenets created tension with the training I had received through my social science doctorate program. Even though the information shared resonated on multiple levels and confirmed what I had been seeing in our field for years, this new model still felt uncomfortable and contrary to

the well-established methods and notions of rigor and validity I have known as a quantitative researcher.

My heart, as our colleagues at EEI would say, was on board, but my head was reluctant.

When I shared my first concern, Jara Dean-Coffey, EEI’s founder and director, was reassuring and moved me away from the all-or-nothing mindset so many of us in this field default to. We could, she noted, make SOME changes, even incrementally. Everything didn’t have to be torn down to make progress. This tension loop — taking some risk, learning, and moving forward — would continue to exist. This has been a centering point of the work, and yet it is one of the more difficult ways to gain traction, particularly with those not familiar with EEI.

Regarding my second reaction and everything I learned pursuing my Ph.D., I ignored it and kept moving forward.

When we learned EEI was soliciting foundations to join a peer cohort called practice partners, we jumped at the opportunity. The initiative presented an equitable evaluation framework that instinctively felt right despite the challenging work that would accompany it. This felt like the best path forward for our staff, our community partners, and our board.

This call for participation occurred at the peak of the pandemic when there was little joy or energy in the work. Our interaction with EEI was one of the few exceptions. We often talk in our EEI cohort calls about being attentive to our senses, and this reframing mapped on to the heart component.

The timing of the peer cohort was particularly advantageous for us and gave us a head start as we began to define our purpose and adopt more trust-based philanthropy approaches.

Our Experience With the Framework

A philanthropic default — and I include myself — is often to look for a model from a peer or a guide that we can integrate into our operations

with minor adjustments. But the Equitable Evaluation Framework™ does not come with tools, templates, or instruments for one to replicate. This framework stresses that implementation will naturally vary by organization and the communities they serve. It is up to each foundation to determine an authentic path forward. The only tool, in fact, is the individual and their influence.

The year two cohort included five foundations and began in November 2020. We were well-matched as we were primarily small to mid-size in terms of assets and based mostly in the Midwest and East Coast. As part of our participation, we had five annual Peer2Peer Collaboratories facilitated by our EEI coach and knowledge curators. Additionally, we participated in quarterly coaching calls every three months where we could wrestle aloud with current tensions, sticking points, or aspirations.

At times we felt overwhelmed, and I was challenged by how to implement this work (both internally and externally) during a time when Health Forward itself was radically changing and already introducing many new concepts to our grantee partners.

The two-year Practice Partners experience allowed participation from six individuals per organization. In our first year, we did not use all of our six slots and most of the participants were learning and evaluation associates. In year two, we had six associates participate; this expansion included associates from other departments. This change was important. Not only did it infuse the framework throughout our organization via different messengers and entry points, but it also acknowledged that this work didn't solely belong to one team.

Integration of teams and viewpoints from other areas of the foundation proved crucial to moving the work. We were told early in the process that the most valuable tool to move the work would be ourselves. If the tools in the process are the people, more tools are always helpful.

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Framework Case Study: Stories in Power

Early in our participation, we saw an opportunity to try out some of our learnings and begin to sprinkle the Equitable Evaluation framework into our work.

As part of its new strategic plan, Health Forward added an explicit focus on power, specifically building and supporting community power. Our first step was to avoid making our own assumptions about power and instead learn how communities define power in their own words. Those who are affected by systemic racism or live in rural communities are often excluded from decision-making tables. These were the people we wanted to listen to and learn from.

We partnered with Ad Astra Community Innovations Group to facilitate meetings with community members. This partnership resulted in a project we call Stories in Power, a collection of community voices detailing how they have experienced their own power — or their lack of power — in making decisions that affect their lives. Our focus was twofold:

1. Explore power as a critical component for advancing health equity and justice.
2. Co-facilitate this project with the community, therefore intentionally sharing power as part of the process.

With our new purpose and strategic plan, Health Forward is using equity to reframe its relationships with our communities. For

FIGURE 1 The beginning of a Stories in Power session



evaluation and learning, this meant a shift from an extractive relationship in asking for data to one where the community plays a critical role in design, collection, analysis, and use.

To accomplish that aim in Stories in Power, we formed a community advisory team of 12 people who drove the project. The team represented community leaders, residents, and grantees from across our service area in Kansas and Missouri. We selected them because of their proximity to their own communities and because it ensured representation from different groups, including people with disabilities, those with diverse personal experiences, and variation across age, race, gender, and county of residence. These members determined what questions to ask community members, designed the engagement opportunities, connected us to the community, and ultimately made sense of, and reflected on, the data we gathered.

In sync with the idea of sharing power, and recognizing the value they brought to the project, team members were compensated at the rate of \$75 per hour. Aside from monthly meetings, each community advisory team member decided how much time to invest and defined their own roles. One member was instrumental in survey dissemination and completion; she attended neighborhood groups and encouraged people to respond. Other members facilitated

listening circles or “Sip and Paint” meetings, which we explain next.

Data regarding power and perceptions of power were gathered in three main ways:

1. *Listening circles:* These conversations were designed and facilitated by both the research consultants and the community advisory team members. They explored how, when, or why community members may or may not experience power in our communities, and generally lasted 90 minutes. Around 150 people attended one of nine sessions; some were so large that we used two rooms for better conversations. People who participated varied along age, race, and ethnicity, although the majority were people of color.
2. *“Sip and Paint” sessions:* These sessions were guided by our community advisory team and merged creative exploration and cultural storytelling. While some of the prompts were similar to the listening circles, participants were encouraged to use art to convey their answers. (See Figure 1.) We held five of these meetings, and 86 people participated.
3. *Community survey:* The final source of data was a community survey. Created by the community advisory team, the survey asked about dimensions that were, or were not, associated

FIGURE 2 A SIP participant creates her “painting of power”



with people’s power. Almost 600 surveys were completed by community residents.

Our Findings

Community members appreciated having a safe space to openly talk about power. It felt like folks were engaged as their authentic selves, largely because of the coordination and participation of the community advisory team members. Participants shared stories that were deeply personal, they were engaged, and they empathized with one another without judgment. When Health Forward associates and I attended these conversations, we were struck by how powerful they were because the community owned the room.

This is some of what we heard during the listening circles:

It’s saying, when there is something that happens in our community that we don’t like, is the power of people coming together to say, how can we as a people overthrow, organize, come together to start initiatives, start programs so that our community is safe from whatever is impacting us.

— Listening circle participant

FIGURE 3 A SIP participant’s “painting of power.”



This is power. Power. Keep on going, girl. People need to hear you. They need to hear that. You know, that’s what it is. The enemy wants to silence us. But we have mouths. Our mouth is our power. Our mouth is our power. Our words that we speak is our power.

— Listening circle participant

“Sip and Paint” — that was powerful, being able to tell your story by painting a picture. You have to paint the picture first. So, as they were showing their pictures and telling the meaning of their pictures, some had hope, some had a story of peace now, and they were able to show what their emotions were at this time.

— Community advisory team member and facilitator

Power to me involves a community to see the growth and improvements in their area. The sun provides the world with energy. [See Figure 2.] The sun grows our food, provides our bodies with energy. This is a Black face because this reflects my community and representation validates the power of my culture.

— A SIP participant

It symbolizes like grinding, like really working hard. But also, the combination you are making, satisfied when you’re feeding your family. [See Figure 3.] Every day you use your molcajete and

you make sure you mix the tomatoes and the jalapeños and cebolla (onions) and you make something beautiful to share with the community. So, I feel like the hard work is what makes the community thrive, right? We all have to put in our part. And so that's kind of what my molcajete represents.

— A SIP participant

In thinking about what components were related to feeling powerful, respondents noted having influence and feeling like a part of a community. However, there was variation in what power meant and felt like to individuals based on life experiences. No one definition of power emerged. One important takeaway was that the community valued the opportunity to share their story in their way — whether that was visual art or the spoken word.

As conversations continued, however, we started to hear stories of perseverance and resilience, often led by the older adults who spoke of progress over time. As the conversations evolved, we began to hear the younger people recognize their power and brainstorm strategies around how to wield it.

The Framework Within Stories in Power

We viewed this project as a chance to try out some components of the framework. It also gave us an opportunity to practice unlearning some of our tightly held beliefs, or EEF orthodoxies, regarding evaluation.

The Value of Qualitative Data

Credible evidence comes from quantitative data and experimental design. Given the origins of evaluation in philanthropy (Dean-Coffey, 2018) it's unsurprising that foundations have defaulted to quantitative data, something that can be counted or graphed as "real data." While qualitative data have always been valued at our organization and by our board, more narrative stories were generally seen as a communications team focus, not as a standard tool used to demonstrate progress.

This was only the second time our organization has used art as a medium for outcomes. This type of information landed differently when we presented our findings to our board. The pictures and their meanings elicited an emotive response from our board and colleagues. We were able to complement these data with information from the survey and more traditional thematic analyses of the listening circles.

Presenting these in tandem allowed us to show a more nuanced picture of the work. It also helped us gain buy-in from people with different learning styles. Showing the images without additional information would not have resonated with some board members in quite the same way.

Accountability and Reciprocity

We worked on this project to reframe what accountability meant. As the EEF orthodoxy notes (EEI, 2017), funders often consider accountability as a one-sided set of expectations rooted in compliance, generally expressed as setting expectations and contractual compliance obligations for our grantees, consultants, etc.

We tried to practice reciprocal accountability. What was the foundation's responsibilities to community? We wanted to move the needle on how we partnered with communities around data collection. Too often it can feel like an extractive relationship. We wanted to actively create agency with this project. In most of the work, philanthropy sets the tone and grantees or the community respond. We tried to flip this; it was really driven by community advisory team members and community. When they noted it needed additional time, we extended the project. They were the ones who pushed for more community meetings and feedback.

Additionally, several of us at Health Forward served as members of the advisory team. While it is common for grantmakers to be on groups like this, our role was different; we were not facilitating or leading the discussions but merely participating similar to other members.

A Process in Service of Equity

The process itself was in service of equity. Participants at these events were actively engaged and the mood was, at times, deeply emotional. The conversations frequently started from a place of feeling powerless. But during the process of sharing and listening to others, participants ended up with affirmation of their own individual agency. One participant at a listening circle noted:

A lot of people in the beginning talked about feeling powerless. ... By the end of it people had shifted their mindset and talked about what power they had. They were leaving in a very different place. Watching that and listening to that, as people supported each other across the room, was powerful.

Tensions and Challenges

Using this approach was not without tension. One of these was the time it took to conduct the project. Originally estimated to take nine months, it soon stretched to 18 months. In retrospect, it is somewhat shocking that we allocated only nine months for this type of project. The goal was to have it inform some strategy development in 2023. This speaks to the philanthropic mindset — and particularly its focus on timelines. This project did not unfold in a straight line; instead, and similar to our work with EEI, it took a meandering path that allowed us to engage in more learning and authentically develop relationships. Not surprisingly, convening community members and implementing a schedule that worked for them took extra time. And, as noted earlier, community members pushed us to extend the project.

Because it took us time to thoughtfully adjust to input and reflections, Health Forward also contributed to the slower pace of the project. When we received a draft of the project results, we thought we were ready to wrap up and share the findings with our board. Our community advisory team members wisely counseled against this. They instead urged us to model power sharing and show the results to the community first. This was undoubtedly the right step, but it took time to schedule six meetings across our

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region. Our discomfort grew as the distance from the original deadline increased, as we battled against our ingrained mindset. Even though we knew it made sense for the work, the desire to meet the deadline was strong and it was hard not to feel as if we had failed by needing more time. It was a challenge not to default to the question: When will this be done? We had to consciously remind ourselves to keep the focus on more helpful questions: What are we learning? And how are we creating with community?

The strategies related to the Power focus area we developed prior to the completion of this project; however, we saw the ability to execute those strategies differently because of this work. One example is how we engage with applicants. Prior to Stories in Power, we offered prospective grant applicants opportunities to engage with staff, but not in a proactive way. We have since shifted to begin our processes from a place of listening, authentically engaging at the earliest possible opportunity.

While using multiple types of data has many advantages (who doesn't like a good drawing?), it is more difficult to summarize. How do you sum up that information, especially in a world with shorter attention spans? Context was key for this project, yet that doesn't boil down to a single sound bite. How do we do justice to the richness of the data collection? We have struggled to distill and explain our learning in a digestible way. And just as important, how do we use this information to drive and inform our work moving forward? We have used traditional

FIGURE 4 A graphic depiction of the Health Forward Foundation's participation as a practice partner

Attributable to Equitable Evaluation Initiative and Lane Change Consulting.

data sets to inform progress or impact but using these data to drive strategies has presented a learning curve for us.

Conclusion

The Stories in Power project was one way that Health Forward began sprinkling the equitable evaluation framework into our evaluation efforts, but our journey over the past two years has been greater than one project. It's not easily summarized by one data point or even one story. A graphic representation of our participation as a practice partner clearly shows some of the recurring themes, steps forward (and backward), as well as sticking points. (See Figure 4.)

What do we see in this image? Change is apparent. Change in roles, in focus, and in leadership. Overall, a lot of uncertainty was occurring

during this time and the visual conveys that and the feelings surrounding it.

We continually wrestled with meeting our board's expectations, and we brainstormed on how to bring them along in incorporating this framework — not always an easy task recognizing the many other items they had on their agenda. We had to acknowledge that they needed the same space and time to think about the framework that we ourselves needed.

To assist in those conversations, we leaned on our spheres of influence. Our annual board retreat had a panel on equitable evaluation with national leaders, including Jara Dean Coffey and Marcia Coné, Ph.D. This panel produced a very rich conversation and further illustrated the importance of this model.

The Stories in Power project has been helpful in providing a concrete example of how the work can be different. Leading with that and having it received positively helped us to lay a foundation for different ways of thinking about evaluation. Finding a successful model early was helpful as questions arose or other members defaulted to wanting more traditional data. We all need to see it repeated. Additionally, the support we received through coaching and peers was invaluable to this work. It helped to ground us by reminding us we were indeed making progress even if it didn't feel like it.

Real change has occurred in how we talk with our board regarding evaluation and learning. We can tell there has been growth in our shared language around equitable evaluation. Phrases like “stories” and “different types of data” are more common in board meetings. Change in language is critical to change in action. At a recent meeting, board members self-led a conversation about learning and evaluation, with several board members establishing themselves as key champions of this framework.

Having said that, this will be an ongoing process. Board and staff members continually change. It is common to have questions focused on more traditional requests for metrics or wondering if data we have are insufficient for our “impact.” We will never be finished with this conversation. I'm reminded of the adage that we are moving a body of work.

A message that Health Forward needed to hear over and over was “both/and”: in other words, the idea that we could proceed along multiple fronts at once, some of which more strongly aligned with the Equitable Evaluation Framework™. Because of our excitement around the framework, we wanted all our work to fully encompass this new approach. And, inevitably, when work couldn't fully encompass the new approach, we felt both frustration and disappointment. Our coaches had to keep reminding us not to fall back on all or nothing thinking.

While the Stories in Power project proved to be one of our first opportunities to apply the framework, we didn't pause other evaluation work that was in progress. We allowed ourselves the space to experiment with a different approach without feeling like we needed to fully adopt it across all our work. It wasn't an either/or choice. We knew that incremental progress on one project would allow us to integrate the framework into future work, without having to hold up all our ongoing projects.

We are proud of the progress we have made related to learning and evaluation, but we are far from finished. Tensions and setbacks continue. Not every project matches the success we found with Stories in Power. However, we are no longer sitting with our heads in our hands — we are continuing to move forward. At the heart of this work is knowing that this approach allows us to honor our values while demonstrating progress in our communities.

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