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A Team's Journey Toward More Equitable Philanthropic Research and Evaluation Practices

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Introduction

Over the past decade, we, as members of the Research and Evaluation team at the Annie E. Casey Foundation, have been on a journey to explore, assess, and reflect on what it means for us to engage in equity-focused practices.

We do so as a team with a diversity of identities and backgrounds. Together, we represent multiple racial, ethnic, and cultural identities, as well as genders and sexual orientations. Our academic training reflects a variety of disciplines that include child development, education, psychology, sociology, and public policy. While we all had experience conducting research and evaluation prior to entering in philanthropy, those experiences have been in a variety of settings that range from evaluation firms to government agencies to academic institutions. We bring this diversity of experiences and perspectives together through a shared commitment to finding ways to use evaluative practices to advance our knowledge of how to improve and promote more equitable conditions and resources for young people and their families, so that all young people have the opportunities that they need to succeed.

Within the foundation, our team identifies and invests in research and evaluation projects that generate evidence and data about policies, programs, and practices that affect the well-being of young people and their families. As a team that prioritizes applied research, our aim is to build the capacity for those who make decisions that affect the well-being of young people to use this information so that these decision-makers can improve the quality and responsiveness of resources and ecosystems to meet the needs and aspirations of all young people.

Key Points

- This article describes the journey of the Research and Evaluation team at the Annie E. Casey Foundation to develop an approach that would allow us to rethink and deepen how we, as funders of research and evaluation, center equity in our practice.
- In particular, we explain how, through this process, we began to focus on what it means to orient research and evaluation toward participant owners and came to examine the assumptions, expectations, habits, and values that we held. These experiences have presented us with opportunities to learn and be open to new ways of engaging in our work.
- We illustrate what this has looked like through vignettes involving five different Casey Foundation research and evaluation projects and conclude with some of the core lessons that we have learned: View tension as an opportunity for creativity; build in and protect space and time for reflection; and develop rapport and trust to strengthen practice.

While each of us has had experience and training in conducting research and evaluation, our role at the foundation is to partner with external researchers and evaluators who carry out the studies that we fund. We recognize the privilege that we hold by virtue of our position as funders, with significant ability to choose

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how the foundation's research and evaluation resources are used. In our role, we greatly influence what questions are answered, what happens to the information produced, who participates, and how they do so.

In our journey toward more equitable practice, we have challenged ourselves to see research and evaluation as more than just tools that can illuminate racial disparities. For us, this involves consideration of how the process and methods used in research and evaluation can be implemented more equitably and what it means, for us, to say that evaluation is in the service of equity as encouraged and supported by the principles of the Equitable Evaluation Framework™(EEF). Central to this examination, we have worked to integrate research participants as research owners — including them in decisions about what is studied, how studies are conducted, who has access to data, and how findings are used.

Through this process of exploration, we have learned about what this approach means for others. But in many ways, the lessons we have learned about ourselves — as individuals, professionals, and representatives of a grantmaking organization — have been central to helping us learn and strengthen our work. In bringing the evaluative lens to our own practice, we came to recognize and challenge our assumptions, interrupt our habits, and change our practice. The process has been simultaneously rewarding and challenging, giving us inspiration and discomfort, as we strengthened our capacity to engage in reflexive practice, slow down, and be aware of our biases and the limits of what we know.

This article focuses on our team's efforts to develop an approach that would allow us to design and implement multiculturally valid evaluative work oriented toward participant ownership and aligned with the EEF principles. Through our personal experiences participating in the Equitable Evaluation Initiative, we reflect on how we have designed and used evaluation to advance equity. As an account from our team's perspective, this article does not represent the viewpoints of those with whom we partnered in this work — even as these partners have had a significant influence on us.

This account shares five vignettes from different Research and Evaluation projects to illustrate how the team came to examine our assumptions, expectations, habits, and values and how this process helped us, as named in the EEF, to be open to new ways of being, thinking, and doing. Centering equity in our work can take many different forms, depending on the project, the context, our partners, and ourselves. The focus is on the process, as imperfect as it may be. We conclude by highlighting how these experiences have taught us what it means to invite vulnerability, take risks, and stay in the practice to find ways to be creative, protect space for reflection, and build the type of trust with partners that allows for mutual openness and learning.

Commitment to Equity

The Annie E. Casey Foundation is dedicated to developing solutions to build a brighter future for the nation's children and youth. The foundation's work is grounded in the belief that all young people, no matter their race, economic background, or neighborhood, should have access to the resources and connections that they need for well-being and success. The foundation bases its work on the best available data, which show us that a young person's race and the community where they live are critical

predictors of well-being. If we want all young people to thrive, we must reckon with the legacy of discriminatory policies and practices that have caused enduring barriers for young people of color to succeed. We must move toward equity — ensuring all children, youth, and families have what they need to enjoy full, healthy lives.

The foundation targets its influence and investments to reduce and remove systemic barriers for children and families. This work includes developing the capacity of foundation staff to reflect on the role of race and ethnicity in the areas of their work and to identify and support approaches that will create more equitable opportunities for all young people.

As part of this commitment, the Research and Evaluation team has had a long-standing practice of examining data about the differences in the experiences and outcomes for individuals based on their race and ethnicity — and using research and evaluation to provide information on what those differences are. We also have looked at why these differences in outcomes exist based on race and ethnicity, which means examining how systems and structures create and sustain inequitable access to resources and supports. These approaches are aligned with the third principle of EEF: to examine historical, structural, and cultural systemic drivers of inequity. Over the past decade, as we have reflected on how research and evaluation might create more equitable opportunities for young people, we have explored how we might go further and ask what it would mean if the very practice of research and evaluation was done more equitably.

Put another way, if looking at disparities and examining their root causes to point the way to solutions defines *what* an equity focus in research and evaluation aims to do, we have begun to ask ourselves *who* and *how* questions — like who decides and benefits from what is studied and how we study it. This expanded focus on equity has centered our attention on how research and evaluation practices can reinforce or mitigate inequities.

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Embedding Equity in Research and Evaluation Practice

To support us on this journey, in 2017 we partnered with the Equitable Evaluation Initiative to engage in a series of reflective conversations grounded by the three principles of the Equitable Evaluation Framework™. These principles state that evaluative work should be:

1. in service of equity,
2. planned and implemented in a way that is consistent with the values underlying equity work, and
3. designed to answer critical questions about the effect of a strategy on different populations, the underlying systemic drivers of inequity, and the role of history and cultural context.

We looked at how these principles were influencing our work and how our team could develop a cohesive approach that would allow us to rethink and deepen how equity was embedded. The team was not looking to eschew any of the existing research and evaluation methods. Instead, we recognized that the historical, cultural, and structural circumstances in which these methods have evolved illuminate certain ways of knowing and obscure others. We have sought

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to understand what it would mean to use those methods with equity as a central tenet, as well as to consider how we might use other methods that could capture forms of knowledge and perspectives that standard evaluative methods may miss. As a team, we agreed that there was no single approach that advances equity in research and evaluation and that we would not want the perfect to get in the way of the possible.

Since 2017, we have developed, piloted, revised, and operationalized an approach that assumed that any study — regardless of the method — could be conducted more equitably.[1] This approach allowed us to adapt to context and opportunity, building in critical reflection points at any stage of a project. The EEI team partnered with us to develop a process for asking reflexive questions at any phase in the cycle of research and evaluation projects to assess and strengthen the extent to which our practices advanced equity. This equity focus is not a separate bucket of work but instead an important and expected dimension of all our projects. Everyone on the Research and Evaluation team owns their part and is committed to understanding what equity means in their work. The team allows for the fact that the operationalization of equity-focused practices will vary and can exist along a spectrum.

The reflexive questions that we developed center around how our team, our research and evaluation partners, grantees, and community members are coming together in the work. What are each of our roles? Who has a voice and how? How are we working to build trust and to what extent are relationships grounded in trust? Are we providing space for everyone involved to reflect? Being honest and intentional in our answers to these questions has been fundamental to making equity-focused practice possible.

It became clear to us that the most meaningful aspect of this work centered on the EEF principle of orienting research and evaluation to be owned by those who are meant to benefit from it, or "participant owners." Making this shift required challenging several orthodoxies named in the EEF, including the notion that funders are the ones to define success and be the primary users of evaluation findings, and that evaluators are the final arbiters and experts within an evaluation project. As a result, our most significant move has been in giving space for others to be part of the decision-making processes that shape our projects, particularly those who are most affected by those projects and historically have been excluded from such decision-making. While who these community members are will depend on the project, they have included young people, community residents, program participants, frontline nonprofit staff and people who can contribute their life experience to inform our work.

Prioritizing Communities' Interests and Perspectives

Orienting research and evaluation toward participant owners requires reordering the typical funding and research process. It means prioritizing communities' interests and perspectives, so that we start with engaging community members, not researchers, to define what we study, how we study it, and why. It means taking time and resources to build rapport and create a project together.

This process also has taught us that we need to focus not just on learning about and responding

[1] The foundation is creating publicly accessible resources based on the approach the team developed. Resources are expected to be available by late 2023.

to communities' priorities and interests. It requires that we understand and be explicit about our own aims. Engaging in projects in partnership with community members has required that we reflect on the other side of the coin — that is, questioning our own habits and assumptions. The next paragraphs describe these habits and assumptions, followed by five vignettes to make our experiences and learning concrete.

Engaging in projects in partnership with community members has required that we reflect on the other side of the coin — that is, questioning our own habits and assumptions.

For example, when we developed our collective approach to centering equity in our work, we held the assumption that as representatives of the foundation, we had an important role as facilitator, convener, and translator. Serving in this type of role felt familiar to us. As a funder in the research and evaluation space, we often sit between groups — most typically evaluators, our program colleagues, and grantee partners — and facilitate communication and translation, ensuring that the studies are methodologically sound and will make relevant contributions to knowledge and practice. But we had been performing this role in a well-established dynamic in which the parties understood and had experience negotiating the differences in decision-making authority. The unspoken agreements could give us the sense that we were operating as a neutral party, one that uses impartial, scientifically based criteria to determine the strongest result.

When we began to engage more deeply with community members not as subjects of research but as true partners in decision-making, we needed to come to terms with the unequal dynamics of authority, question our assumptions, reflect on the habits of practice that had defined our work, and make explicit what had been implicit. It was not enough to make space for others to join, for simply making space was insufficient to alter the dynamics and structures of privilege that separated the philanthropic sector from the communities that had experienced decades of disinvestment and marginalization. It meant being willing to show up in a way that acknowledges and deals with the discomfort of that dynamic. And it meant recognizing that we could assume neither neutrality nor that the role of translation belonged with us. We were entering this space as partners and had to discover and take active steps toward sharing authority and ownership.

We have learned that the process of building equitable partnerships is a continuous one. It would be simplistic to think that with awareness and some initial effort, we might arrive at a steady state of equitable practice. The reality is far more complex, with a continuous need to question assumptions, clarify expectations and values, and navigate relationships. In fact, discord and tension are not to be avoided or removed. These dynamics can be the source of change and growth when we have the capacity to understand and address them constructively within a space of safety and openness to multiple perspectives and experiences. Doing this work means continuously engaging and learning and being willing to lean into discomfort. It means recognizing that we are also part of the system and have a role in either promoting or hindering a more equitable world. For this reason, we think that it is important that we do not simply give funds for others to do the work, but also take an active part in the process and examine our role and actions. This has required that we transparently represent the interests and priorities of our foundation while being open to critiques and questions about our practices, assumptions, and values. Inviting and responding to this questioning doesn't mean, necessarily, that we have to abandon our practices and values, but it requires being open and willing to slow down. The way we respond has significant implications for rapport and trust.

These examples show how we have worked to privilege the perspectives of community members and be cognizant of who is coming into the partnership, with attention to group dynamics and the need to recognize various perspectives.

How More Reflective Practice Can Lead to Creative Solutions

To illustrate our experiences with this effort, we offer examples from five research and evaluation projects in which we sought to engage in more equitable practice. These examples show how we have worked to privilege the perspectives of community members and be cognizant of who is coming into the partnership, with attention to group dynamics and the need to recognize various perspectives. With these projects, we experienced what it meant to enter the work as individuals and be explicit about our reasons for being in the room, as well as to check our assumptions about what community members wanted to engage in and learn. This process led us to identify methodologies that were relevant and more aligned with the realities of our community partners.

Vignette 1: Comparing Data in Communities

As part of a multiyear effort to equip community collaboratives with an approach to implementing relevant prevention programs for young people, we provided support so that community members could collect data about young people's interests and needs to select the most appropriate programs.

When community members wanted to compare their local data with national averages, our initial response was to dismiss the idea of a comparison for methodological reasons: the national data were 15 to 20 years old and not derived from the same measures, while the communities varied dramatically in their demographic characteristics. In our effort to explain the scientific reasoning, we failed to listen to community members to understand why comparing the data to these national statistics mattered to them.

We learned that this tension was not to be resolved by choosing one perspective over the other. We did not need to ignore the methodological challenges of comparison to meet the priorities and needs of the communities. In fact, it was only in recognizing both priorities that we were able to work together to find creative ways to use comparison data while still being careful in the interpretations and conclusions made.

Vignette 2: Making Non-Negotiables Clear

When we wanted to understand whether significant capital investments in a neighborhood in Baltimore, Maryland, were helping to ensure that all residents — particularly residents of color who had lived in the neighborhood for a long time — had access to resources like affordable housing that they needed to thrive, we invested in a research project that would be led by residents.

With the help of a consultant who had extensive connections within the neighborhood, we brought together a group of seven individuals to serve as advisors. These advisors, who all had experience in leading community-based efforts and were chosen to provide a range of perspectives, were either current residents or had family ties to the neighborhood. We wanted the advisors to make decisions with us about what the research should focus on and how it should be carried out. To help us come together as a project team, the consultant, who was familiar both to us and the advisors, facilitated the initial conversations. As funders, we took an intentional step back to give space for the advisors to step into the work. In meetings, we were judicious about when we spoke to avoid dominating or closing down discussion.

During one meeting in an early stage of the project, it became clear that the advisors saw our attempt to cede space as us not being fully forthcoming with them. They wanted to know why we were there, what we wanted from the project, and what non-negotiable requirements we were holding. They wanted to know that we wouldn't pull the rug out from under them or ask them to create a project that was ultimately for the benefit of others, not the residents. As a team, we thought that we had been transparent about what the foundation sought through this project and clear about our intent to create a research project with them. However, we had not defined the specific objectives of the research, which not only led to residents lacking clarity about what we were looking for but also increased distrust between the residents and the Casey team.

We realized that we had been operating by the orthodoxy that trust comes from doing the work, as opposed to the establishment of trust being a necessary starting point. We needed to take the time to build trust with residents and for them to know us as individuals, not just as representatives of the foundation. This experience taught us about the importance of addressing the unequal relationship between funder and community and understanding the vulnerability that community members feel — individually and collectively — when partnering with funders.

Vignette 3: Delivering Lessons in Ways that Respond to Community Needs

To support learning about community-led efforts to lift up the voices of local residents of color, the Research and Evaluation team funded a research project in which an artist, in partnership with communities of color, created a series of walls where Black people could write, draw, or paint their unfiltered experiences, thoughts, and emotions. Through qualitative narrative analysis, the research team looked to identify insights on how providing culturally appropriate physical spaces such as these led Black residents to experience healing and spiritual rest. The project's artist used observations, videos, and audio recordings to capture and interpret in real time what community members shared.

Our assumptions and tendency as funders to hold to the orthodoxy that findings from evaluations should provide generalizable lessons and that success is found with replication did not work here. It was essential to recognize that context mattered.

When the Casey team asked for ways to scale up this project, the artist and local evaluator pushed back. They pointed out that this was a community-driven project with a methodology that responded to the needs of specific Black communities that were disinvested, felt forgotten, and were initially reluctant to see beauty in common spaces. The artist and local evaluator explained that expanding the work would depend on the buy-in of local communities and local organizations that had to take care of the community walls, collect the data, and document what the community would share in a culturally appropriate and trust-based way.

Our assumptions and tendency as funders to hold to the orthodoxy that findings from evaluations should provide generalizable lessons and that success is found with replication did not work here. It was essential to recognize that context mattered. The specific history and culture of Black communities needed to be acknowledged. Community residents were responsible for maintaining the walls as emotionally safe spaces. We needed to attend to what the community and local organizations needed and could do.

By taking the time to listen and understand the complexity of this project, we were able to better

We see this advisory group as an opportunity to enhance the capacity of young people to guide and inform the design, implementation, and use of research and evaluation, while also increasing our capacity to implement equity-focused evaluation practices in our work, including youth-led and youth-owned research.

support the grantee and collectively find ways to present the results of this project in specific contexts. In this case, a traditional research report was not well-suited for conveying the qualitative narrative and, given the need for the approach to adapt to the specific historical, cultural, and social contexts of Black communities, we recognized the need for a product that allowed for creativity, flexibility, and an approach that could respond to the needs of the communities. Together with the artist and local evaluator, we determined that the solution would be a guide that provided the elements needed to create the community walls, as well as a series of tips to engage Black resident members and help document and present lessons to a broader community.

Vignette 4: Valuing Different Kinds of Expertise

As the team set out to conduct a study around supports for young parents, we established an advisory group that included young parents, practitioners, researchers, and policymakers. The advisory group was asked to help create a research approach that would prevent harm to communities and ensure a positive experience for all involved. It did not seem equitable to compensate the parents at a lower rate than the other members of the advisory group, so we as funders decided to recognize these different types of expertise with the same level of financial compensation, as well as providing for equal decision-making authority in determining the study design.

One expert who had been invited to join the advisory group — chosen for their extensive experience and leadership in the field of parenting research — objected to this arrangement, feeling their academic experience deserved greater recognition. We, with our external research partners, asked ourselves whether the project would have the same validity without this leading expert's participation, holding to the orthodoxy that evaluators should be selected based on conventional notions of expertise. We paused to reflect on our assumption that for scientific validity and evidence building, certain professional expertise was required.

Through this reflection, we determined that prioritizing one expert to the detriment of others would not honor our values, so we rescinded the offer to the expert. This was not an easy decision or one that we made lightly, but it was a critical one and actively affirmed how we wanted to work with all our partners. In the end, this experience helped to create the type of diverse and well-balanced advisory group that could truly help prevent future harm and ensure a positive experience for the communities involved.

Vignette 5: Sharing Responsibility for Solutions

In 2021, we began investing in a youth research advisory group that could partner with us on research and evaluation projects that examine issues relevant to young people. To support this project, we partnered with two organizations — a research consulting firm and a national organization with deep expertise in youth engagement — to lead the advisor recruitment, interview, and selection process; facilitate capacity building for the advisors and Research and Evaluation staff; and support the advisors' engagement in the research projects.

These partners helped us gather recommendations from an extensive network of

youth-serving organizations to identify a group of six advisors between the ages of 16 and 24 who reflect the types of young people that the foundation prioritizes in its investments: youth of color, those who live in low-income communities, those who have had involvement with the justice or child welfare systems, and young parents. After a 10-month period when the Research and Evaluation team and advisors developed relationships and set a common purpose for the advisory group, the advisors collaborated with the team on two research projects: a study examining racial identity shifts for some young people with foster care experience, and an evaluation of a school-based program designed to support the engagement of fathers — and, in particular, young fathers — in their children's education.[2]

We see this advisory group as an opportunity to enhance the capacity of young people to guide and inform the design, implementation, and use of research and evaluation, while also increasing our capacity to implement equity-focused evaluation practices in our work, including youth-led and youth-owned research. When the six advisors began collaborating with us on two studies, we encountered several challenges: how to collect and integrate youth feedback, the best way to schedule and coordinate meetings, and the most effective communication channels for us to use.

We thought that we were the ones who could come up with the appropriate solutions, but some of our attempts to do so weren't effective. When one of our partners suggested that the advisors might be more effective problem solvers, we began sharing responsibility for the work and ultimately arrived at solutions that worked for both groups. Together we created an approach to communication that blended synchronous and asynchronous approaches. We removed ourselves from meetings where our presence as funders could limit the interaction of advisors and the research partners. The advisors have shared that these changes helped them engage more deeply and feel part of a space of creating and solving problems together.

When the youth research advisors said that they wanted to serve as interviewers and note takers for one of the projects — a role that we had not anticipated — we created tailored Institutional Review Board trainings and spaces for questions, multiple follow-ups, phone calls, and text messages with reminders and key dates. We developed an FAQ document with key definitions and questions that had emerged during conversations and meetings, and a PowerPoint presentation with instructions, examples, and details to help the advisors complete their training. We needed to be able to pivot, be creative, and build new spaces for deeper participation and age-appropriate training that met IRB requirements.

In each of the projects shared through these five vignettes, the questions and feedback that community partners, young people, advisors, and our evaluation partners shared led to valuable opportunities to pause and reflect on our assumptions. Within the discomfort, an awareness emerged that helped us move toward a greater sense of openness and mutual understanding. We could negotiate relationships and agreements, changing our practice and shifting what we prioritize. By establishing the right circumstances, we could have the strength to be vulnerable in our engagement with our partners, take risks, and deepen the work.

Lessons in Practice

These experiences have led to three core lessons that we carry with us as we continue in our efforts to learn and build our capacity to engage in the practice of the EEF. We have realized the value of pausing when tensions emerge, reflecting to examine the assumptions that we were holding, and allowing ourselves the vulnerability to engage in honest conversations with community members and other partners. When we have met the tensions in this way, we find creativity emerging in the search for resolution.

[2] From the start of their engagement, the advisors have been compensated with a stipend that aligns with the foundation's broader youth compensation policy of $43.75 per hour.

Our experiences have taught us that both honoring others' perspectives, priorities, and interests and questioning our own are activities central to this work.

With flexibility and transparency, we could not only identify and pursue more equitable approaches and solutions, but also build rapport and trust with stakeholders, whether they were community members, young people, or grantee partners.

- *Lesson 1: View tension as an opportunity for creativity.* When we not only recognized tensions and divergences but gave space to reflect on how our own assumptions and practices contributed to the situation, we could gain new insights and open ourselves up to innovative ways to think and act. With the situations described in the projects above, we found creative, culturally appropriate ways for communities to share data and the results of their efforts, tailor trainings to engage youth in research tasks, and design data comparisons that reflected community context as well as sound methodology.

- *Lesson 2: Build in and protect space and time for reflection.* Through these projects we have made the space to rethink, recalibrate, and pivot our approaches. Given the restrictions of timelines, deliverables, and project context, it is not always possible. But when we created these spaces, we found that the results were very different. We have been able to reflect on our roles as funders and evaluators, the way we interact with communities, what we bring, and how we present ourselves. Whether this pause is internal or takes place in conversation with trusted partners, it can be a helpful way to identify, examine, and unlearn problematic paradigms. Taking this pause for reflection also helped our team to adjust team dynamics, project goals, and methods to better understand and serve these communities.

- *Lesson 3: Develop rapport and trust to strengthen practice.* Across these projects, we have worked to build relationships and strengthen trust. This process has enabled community residents and research and evaluation partners to speak up and push back to identify the best ways to capture and present the realities of their communities. It means taking the time to get to know our research and evaluation partners not just as researchers and evaluators, but also as individuals who share the same passion to improve the lives of children, youth, and families. Designing activities to fit into the schedules of community members and young people, breaking bread together, holding evening meetings, and using creative forms of communication serve to create a fertile environment for mutual learning where community members and young people can deeply engage in different project tasks and create their own learning plans.

Circling Around

Our team has learned, adapted, and expanded our understanding through our efforts to contribute to greater equity through our practice. We do so, though, with a humility based in the knowledge that there is still so much more for us to learn — and unlearn. Equity-focused practice is dynamic and never complete, based in a continuous process of reflection, communication, adaptation, and relationship building.

We believe that this is partly because we face so many deep and compounded inequities in our society, so that achieving a fully equitable society will be a long and challenging journey. However, something fundamental about equity-focused practice requires that continuous process. Our experiences have taught us that both honoring others' perspectives, priorities, and interests and questioning our own are activities central to this work. These practices require mutual honesty, vulnerability, respect, flexibility, and a willingness to lean into discomfort and the unknown.

We must see ourselves as part of the work and, as funders, not use the privilege of that position to stand beyond the work. We must join in as ourselves and learn how to do better, all within the context that we work in as funders. We must be committed to a journey of continually and authentically learning about ourselves and others — and acting on what we learn in our practice.

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