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## Executive Summaries

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## INTRODUCTION

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### The Practice of the Equitable Evaluation Framework™: Context and Introduction to the Special Issue

Marcia A. Coné, Ph.D., and Jara Dean-Coffey, M.P.H., Equitable Evaluation Initiative

For many, this special issue of *The Foundation Review* is an introduction to the Equitable Evaluation Framework™ and how some folks in U.S. philanthropy are reimagining evaluation, learning, and research through its practice. This article provides an overview of the framework and the initiative that has worked over the past three years, in partnership with many, to “be in practice of the EEF.”

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## TOOLS

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### Learning Circles as a Tool for Participant-Owned Evaluation

Virginia Roncaglione, M.Sc., Innovation Network; Chan Brown, B.S., Kansas Health Foundation; Jennifer James, M.A., Harder+Company Community Research; and Courtney Huff, M.P.H., Harder+Company Community Research

Learning circles are an approach where individuals with a common interest meet regularly to learn from each other about a self-identified topic in a format chosen by the group. Kansas Health Foundation and its strategic learning partners, Innovation Network and Harder+Company Community Research, are exploring learning circles in two of the foundation's initiatives. This article shares the authors' individual experiences and collective reflections on using learning circles as a tool in practicing EEF.

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## REFLECTIVE PRACTICE

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### 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

This conversation between staff at the Oregon Community Foundation and the Hartford Foundation for Public Giving shares how they are infusing the Equitable Evaluation Framework™ into their practice as they aim to be less extractive, shift power, and honor all ways of knowing and being as valid. This article is a rough transcript of their discussion, starting 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? The authors 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.

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

Jane M. Mosley, Ph.D., Leigh W. Quarles, M.P.H., and Jason L. Williams, B.A., Health Forward Foundation

The Health Forward Foundation recently completed a two-year journey with the Equitable Evaluation Institute as a practicing partner. In this article the authors discuss the journey and how they experimented with some of 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 their work can be different and helped them to lay a foundation for new ways of thinking about evaluation.

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

Kimberly A. Spring, Ph.D., Maria Fernanda Mata, M.A., Jeffrey Poirier, Ph.D., Allison Holmes, Ph.D., and Amir François, Ph.D., The Annie E. Casey Foundation

This article describes the journey of the Research and Evaluation team at the Annie E. Casey Foundation to develop an approach that would allow them to rethink and deepen how they, as funders of research and evaluation, center equity in their practice. The core lessons that they 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.

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## A Journey into Equitable Practice: Doing More, Doing Differently, and Doing Better

Bree Bode, Ph.D., Sarah Panken, M.S., Annie Murphy, Ph.D., and Marci Scott, Ph.D., Michigan Fitness Foundation

Six staff members from the Michigan Fitness Foundation participated in the Equitable Evaluation Initiative (EEI) where they learned about the principles of the Equitable Evaluation Framework™, engaged with inspiring podcasts and articles, discussed equity issues in small groups, and benefited from the guidance provided by the EEI leaders and peer practice partners. That experience led to different ways of thinking, learning, knowing, being, and doing. They started to use “equity language” with intent, words such as transformative, framing and reframing, community of practice, relational, accountability, shifting mindsets, and community voice. New ideas to advance equity became a staple in conversations. These new ways of thinking at times caused discomfort and tension. But changes did happen; and the more they changed, the more they changed.

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