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Table of Contents

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Editorial

Dear readers,

This issue of *The Foundation Review* is somewhat unusual in its focus on a particular approach, the Equitable Evaluation Framework™ (EEF). It is also unusual in that the authors were encouraged to explore their personal experiences with using the EEF, including not only their intellectual but their emotional reactions to exploring and seeking to apply it.

The EEF is primarily a way to help us think differently about how knowledge is created, who gets to be part of the creation of knowledge, and how power may be wielded differently based on different ways of knowing. Although some standard evaluation methodologies may be more amenable to practicing equitable evaluation, the EEF does not prescribe specific tools or practices, but rather a different conceptualization of the evaluative process. In keeping with the spirit of EEF, we used a different process to review the papers submitted for this issue. One review was done as a standard double-blind review, while a second review was done by a group of people familiar with EEF who submitted a collective review. This second process provided a much richer set of feedback for the authors than the typical peer review.

The first article in the issue by **Coné and Dean-Coffey** introduces the Equitable Evaluation Framework™; the remainder of the issue provides examples of how it has been put into practice.

- **Roncaglione, Brown, James, and Huff** describe how they are using learning circles as a tool in their efforts to implement more equitable evaluation practices.

- **Spring, Mata, Poirier, Holmes, and François** reflect on the Annie E. Casey Foundation's Research and Evaluation team's work to rethink how they center equity in their practice.

- **Brandt, Casey, Callan, Hicks-Rivera, Leonard, Nguyen, Ragusa, Stancil, Salmond, Seel, and Szczerbacki** share a transcript of their conversation about their experiences at two different foundations.

- **Mosley, Quarles, and Williams** write about Stories of Power approach to understanding power dynamics.

- **Bode, Panken, Murphy, and Scott** reflect on how the Michigan Fitness Foundation has changed its language, thinking, and ways of working based on their engagement with the Equitable Evaluation Initiative.

We hope this issue encourages you to think about how you know what you know.

Teresa R. Behrens, Ph.D.
Editor in Chief

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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

Keywords: *Equitable Evaluation Framework™, practice, praxis, play*

Introduction

Welcome to the special issue of *The Foundation Review.*

For many, this 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. For others, you've been in practice of the EEF alongside us and other individuals and organizations and are, thus, represented in the offerings shared from your colleagues.

Over the past three years, in partnership with many, we've engaged in exploring, puzzling together, and sharing what it means to "be in practice of the EEF." While impossible to convey the depth, breadth, and richness of this endeavor, we hope what follows here provides glimpses and glimmers of what is and might be possible.

The Equitable Evaluation Initiative

The Equitable Evaluation Initiative launched in 2019 as a five-year endeavor to seed and grow a field of EEF practitioners through experimental and emergent practice. Since the spring of 2020 EEI has welcomed 44 foundations into six classes as EEF practice partners. The practice partner pathway consists of a six-month Making the Case Collaboratory, which is the entry point, a two-year Equipping for Transformation experience (See Figure 1), and a newly forming EEF practitioner space (folks who have completed Making the Case Collaboratory and Equipping for Transformation) where folks continue to be in practice and champion the EEF (Equitable Evaluation Initiative, 2022).

The Equitable Evaluation Framework™

Through this practice of collaboration, the EEF has evolved from its original offering in 2017 (Center for Evaluation Innovation, et al., 2017) to

FIGURE 1 Equitable Evaluation Initiative (EEI) Practice Partner Pathway

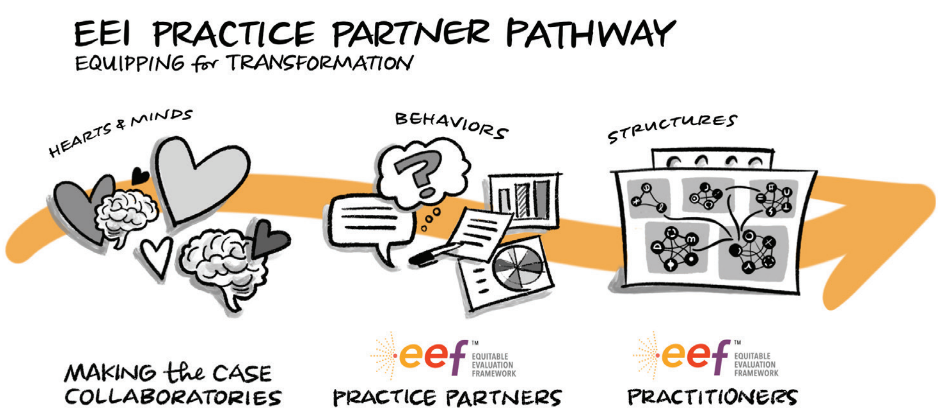
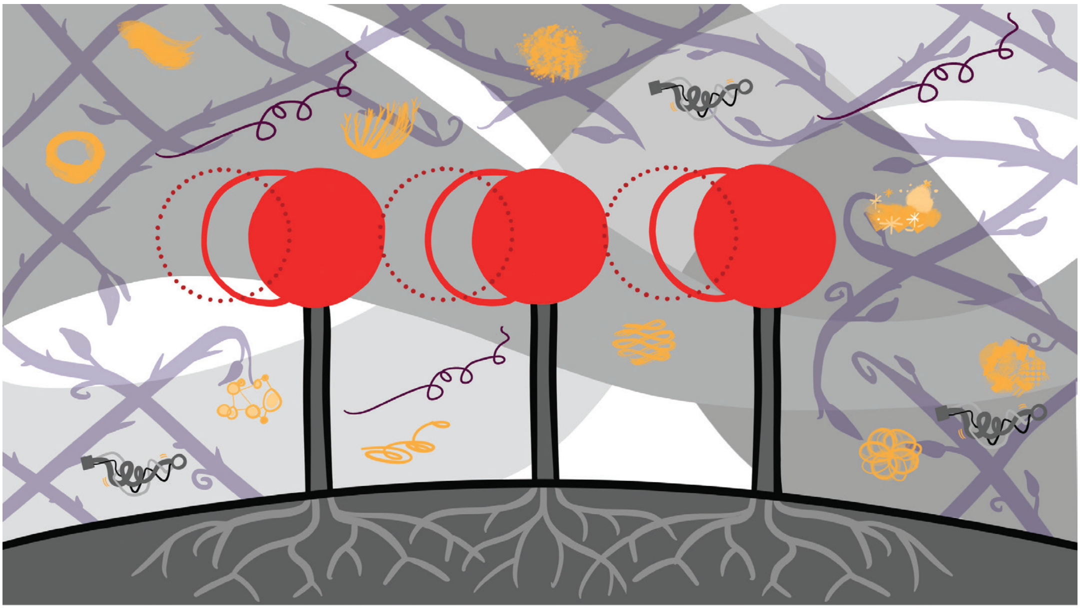


FIGURE 2 Elements of the EEF



https://www.equitableeval.org/post/eef-expansion-eef-elements

an expanded 2020 version shared in *Shifting the Evaluation Paradigm: The Equitable Evaluation Framework* (Equitable Evaluation Initiative & Grantmakers for Effective Organizations, 2021), to its current iteration shared at equitableeval.org/framework (EEI 2022). Today, the EEF is a set of principles, orthodoxies, mindsets, sticking points, and tensions, grounded primarily in the experience of institutional foundations in the United States. (See Figure 2.)

The EEF was developed to provide guidance for centering the multiplicity and complexity of our collective human experiences with an explicit axiological (what we determine to be right), epistemological (what is evidence/knowledge), and ontological (what we believe to be true/reality) point of view. The EEF embraces 21st-century definitions of objectivity (Freundlich, 2016; Harding, 2007), rigor (Lynn & Preskill, 2016), and validity (Kirkhart, 2010), while upholding complexity (Snowden & Boone, 2007). There are methodological implications, but that is not the focus. The human element is where this starts.

The EEF Practice Partner Experience

The practice experience is grounded in the link between individual learning and organizational change, and embraces the complexity and multidimensionality of context, culture, and power. We intentionally call this a practice because unlearning and learning takes time, and muscle memory evolves. As such, varying aspects of the elements of the EEF may be applicable and

> It feels like there's no end to this...the different themes that you can explore and the growth that can happen. I can't overstate how foundational the territory is that we've gone through together...it's so fundamental to how we think about our practice around learning.
>
> And personally, I've picked up a lot of ways of working... how we come together as a group and talk and bring our full humanity to discussions.
>
> —EEF Practitioner

> I'm really grateful for the EEF Practice because it extends much broader than our locale and connects us with other foundations in this work. Being in community with folks who are tipping toward changing the conditions is really encouraging and asks us to stretch, so we might get there, too.
>
> —EEF Practitioner

useful at different times and moments, while others do not feel present or possible. The invitation is to practice the EEF with intention and attention — to consider where there may be an entry point or opportunity to explore one of the EEF principles, for example. We invite curiosity and exploration about stated and unstated beliefs: How do these get in the way of what you are attempting to do? What if that weren't true or is not always true? What might be possible?

Because the practice of EEF requires people and their organizations to reimagine deeply ingrained ideas and practices alongside others, we knew that early practitioners had to self-select into the experience. The level of experimentation, play, transparency, and vulnerability required cannot — or, rather, should not — be forced. They had to want to be in relationship with themselves — examining their own assumptions, beliefs, experiences — and be open in a community with others.

As the EEF and its practice is emergent and evolving, we created a practice environment that was intentional, generative, iterative, and entrepreneurial. Accepting the invitation to enter the practice partner pathway means making space to unlearn old ways and learn new ways of engaging in evaluation, learning, and research. The initiative provides a series of supports and experiences that allow folks to have guided and focused conversations, engage in collective inquiry, push beyond the limitations of conventional practice, and explore many ways of knowing and their expressions — all while playing with new ideas and sharing what they are learning with peers.

The EEF practice partner experience fosters play, practice, and praxis. Play invites a move away from perfectionism, polish, and performance toward experimentation, creativity, and curiosity. It is through play we form new ideas, create opportunities, and experiment with them. Invitation and exploration of play is invited through poetry, podcasts, visual arts, and other embodied, sensory experiences. Practice offers guidance and insight into change processes and provides space to align our aims and intentions with what we do with the new ideas and opportunities. Praxis informs and invites collective inquiry: What are we learning and how is this in support of or expanding the EEF? How might others apply this learning to their own contexts?

> Three words that come to mind [are] softening, grace, and humanity—
> the notion of turning inward and embodying and embracing grace, softening and humanity toward oneself and then turning that outward and offering that to other folks, especially in difficult conversations and experiences, both personally and professionally.
>
> This space makes me think about working on that more intentionally for myself, and in treating other people with grace—not just respecting them, but treasuring them.
>
> —EEF Practice Partner

FIGURE 3 Practice makes perfect, right?

Practice makes perfect, right?
by Chan Brown

Practice makes perfect, right? When it's a dance. Do I push, pull, or pause with my partner to practice the steps?

Practice makes perfect, right? When you're a juggler with balls in the air: partners, pilots, parameters. What do you let go to let in?

Practice makes perfect, right? When you're a magician changing mindsets and shifting paradigms from processes and principles that no longer serve us. We're not the experts, only looking for answers unshackled from our histories.

Practice makes perfect right? When you're the lion tamer, taming your fears. What's ahead on this winding road? Is the path rich with reciprocity or is there reproach?

Practice makes perfect right? When the race is a marathon and not a sprint. I know I can win inch by inch. Learning and unlearning, savoring unhurried conversations. There's no time to talk, rushing headlong for a deadline. Why a deadline and not a lifeline? If time can't stand still at least we can normalize the tension.

Practice makes perfect, right? When I bring my whole self to this work, I must know who I am. To be a movement you've got to move. I'm a black checker surrounded by red, jumping forward with new mental models and personal mastery, cause the game is too important to lose.

Practice makes perfect, right? When it's the transformative power of practice, we take a collective breath, challenging our own orthodoxies, recreating ourselves, releasing perfection. Come play with us, cause practice makes (im)perfect.

The community of practice was designed to weave and thread EEF practice partners and practitioners from different organizations to learn from and with one another. This experimental approach helps move individuals and organizations out of the siloed experiences that are often noted from those working within philanthropy. A poem by Chan Brown, a program officer with the Kansas Health Foundation and an EEF practice partner, illustrates the experience of considering beliefs, assumptions and preconceptions, and constantly recalibrating. (See Figure 3.)

The EEF is fertile ground for being, thinking, and doing not only with and for evaluation, learning, and research, but also across foundations in new ways that center and align stated values. EEF practice partners and practitioners lay the groundwork to create conditions for

change, notice opportunities for conversation to bring others along, trust their ideas and intuition, and engage in the many ways of knowing. Over time, they begin to champion the EEF for themselves and others with ease and authenticity. We adapt, embrace, and align approaches and methodologies that allow us to see and reflect our multifaceted world. The initiative supports and models being (reflecting), thinking (reflexing), and doing (realigning) in service of shifting to something new and different.

Evolution of EEF Practice

We developed and are evolving EEF within a particular context and from perspectives embedded therein. Our most important insights, in our current view, include:

1. EEF is a framework that should evolve in place and time. In fact, it already has and will continue to do so.

2. We have more choice than we allow ourselves, and we invite you and others to move with greater curiosity and generosity with yourself and each other.

3. Who you are matters in all things, including evaluation.

4. We are in an incredibly exciting time where folks are seeking to be more aligned with how they want to be in the world and the world they want to be in.

We invite each of you to imagine the world you wish, explore what that means from different perspectives, then embrace your role in the changes needed to enable it.

This has been and will remain a collective effort. The Equitable Evaluation Initiative is an experiment, one grounded in a deeply held hope (and experience) that if folks could free themselves from beliefs and behaviors that no longer (if ever) served them, a new paradigm could emerge. As we close out the first phase of the endeavor in the spring of 2024, we are excited to extend an opportunity and an invitation to foundations to join EEI 2.0, which will launch in the fall of 2024. Come join a growing community of EEF practitioners who are shifting evaluation, learning, research, and organizational culture to be in alignment with their mission, vision, and values.

Our heartfelt gratitude to *The Foundation Review* for your partnership in making this special issue a reality. To our EEI investment partners, EEF practice partners and practitioners, consultant and nonprofit/public sector pilot participants, coaches, and knowledge curators, deep appreciation and gratitude. This work and this special issue are collective efforts rooted in relationship, trust, reciprocity, and respect among humans striving to be more human. To the authors in this issue, thank you for sharing your expression of what it is to be in practice of the Equitable Evaluation Framework™. The Equitable Evaluation Initiative's commitment and intention remains steadfast: to reimagine what is possible with intention, purpose, and curiosity in partnership with others. Join us by becoming a Practice Partner. More at equitableeval.org/become-practice-partner.

> Joining EEI has been game changing and life changing.
> The EEF is not just sitting within our learning and evaluation team. We are seeing it permeating through the organization.
>
> —EEF Practice Partner

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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

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

Introduction

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

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

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

Key Points

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

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

From my perspective, exploring learning circles was a way to take "baby steps" in moving beyond academic systems of rigor to different ways in which initiative partners might share about their work.

— Chan Brown

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

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

Reflections from Chan Brown

KHF's Evolution Toward Equity

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

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

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

Participating in the EEF Practitioner Cohort

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

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

TABLE 1 Questioning Evaluation and Grantmaking Orthodoxies

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

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

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

Questioning Grantmaking and Evaluation Orthodoxies

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

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

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

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

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

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

Exploring Yielding Power Through Learning Circles

The evaluation projects of two of KHF's initiatives in this article particularly exemplify this commitment to yielding power to and centering initiative partners' learning interests and practices while achieving higher levels of understanding and more meaningful results. While the two initiatives are different in context and characteristics, both are exploring learning circles as an approach for practicing evaluation in alignment with the EEF.

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

Expanding Strategic Learning Partnerships

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

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

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

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

Virginia Roncaglione on the IVE Initiative

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

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

Deferring Decision-Making to the IVE Partners

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

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

— Virginia Roncaglione

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

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

Co-Creating the Learning and Evaluation Project

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

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

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

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

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

1. a participant-led nature, with partners deciding purpose and learning objectives for the circles, facilitator's duties, cadence and length of meetings, and mechanisms for collecting and sharing findings, and

2. orientation toward action, with the circles being an opportunity to work collectively to advance the cohort shared goals. (See Table 2.)[2]

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

Growing Edges: From Participation Toward Reciprocity

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

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

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

TABLE 2 IVE and KDEIC Learning Circle Session Characteristics

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

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

Growing Edges: Equity Vs. Equality.

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

While we can't state that learning circles created the conditions for transformation, we see some evidence of changes that indicates that this practice is one that is in service of equity.

— Jennifer James and Courtney Huff

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

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

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

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

Second, our own practice as evaluators was shifting. We were (and are!) deepening our understanding of our own power and responsibility as evaluators to center more intentionally and directly on those closest to the issue. The use of learning circles was an embodiment of these shifts, and we were excited to support its implementation. And while we can't state that learning circles created the conditions for transformation, we see some evidence of changes that indicates that this practice is one that is in service of equity.

Designing an EEF-Informed Practice

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

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

Shifting Key Practices to Realize Participant-Owned Learning Circles

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

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

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

How Learning Circles Advance Equity and Utilize EEF Principles

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

What is now emerging from the learning circles is connected to EEF's third principle — historic and structural decisions as well as system drivers. Consider the following. As we have nurtured initiative partners' trust in us and the safe space of the learning circle, they have begun to address tough issues related to structural issues that prohibit deeper collective action. The initiative is comprised of four partners with very different orientations and approaches, from small and large community-based organizations to even larger public entities. The learning circles became a space to discuss concerns and challenges, including competition and collaboration for limited resources, expectations, accountability, and challenges related to size and the composition of leadership. These issues came to light not because of the foundation or the evaluator. The catalyst was the learning circles' open topic format and the conditions that build relationships and trust. The partners have developed a deeper understanding of one another and a willingness to work together in ways that are mutually beneficial. And while this was happening, Chan gained a window into how to further support movement building and an important evidence point for the evaluation.

The key to shifting to learning circles was to intentionally focus on what initiative partners needed to be successful. Instead of identifying features of the foundation strategy and inviting partners in, we asked partners to identify topics of most importance to them.

How Learning Circles Are a Key Method to Evaluation

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

The learning circle approach to evaluation is still evolving for us. We continue to maintain a framework that includes what the foundation wants to achieve, but we hold this lightly and are able to incorporate the unintended benefits and success (as well as challenges) that emerge through the learning circle.

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

Using Learning Circles as a Method Aligned With the EEF

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

- *Remember that methods are a manifestation of a paradigmatic change.* Practicing the EEF is much larger than the evaluation methods chosen. It directly addresses the deeper mental models of a foundation and, in both cases, has spurred changes in KHF's general practices. Using learning circles models equity principles that can be extended to grantmaking and other foundation practices as it necessitates interrogating and re-orienting who the work benefits. For example, as the KDEIC evaluation shifted to learning circles, Chan also shifted her approach to strategy. Instead of leading the strategy and partners followed, she listened during the learning circles for clues on how to support their work and what other interventions might be needed to achieve their shared goals.

- *Loosen control over the learning direction, while being clear on what you still need.* For learning circles to live into their promise of an approach aligned with participant ownership according to Principle 2 of the EEF, foundations and the evaluation partners need to relinquish a fair amount of control over what insights the learning circles will yield and for whom these learnings benefit. This also entails foundations' boards and leadership letting go of expectations of dashboards and performance metrics, challenging the philanthropic orthodoxy that "accountability is a one-sided set of expectations, generally set by the foundation" (Equitable Evaluation Initiative, 2022, p.1). In both projects, the ongoing documentation of the initiative partners' learning as the work progresses is the core input for KHF to also glean learnings related to the initiatives. These inputs provide a richer understanding of how the work is progressing to Chan, who believes that centering on partners' learning practices will help her to achieve higher levels of understanding and more meaningful results for communities.

- *Consider bandwidth in participant ownership.* Participant ownership requires creating conditions for change such that partners wield the increased power and resources that are being shifted to them. It does not mean participants do more than they have bandwidth or interest for. Groups benefit from support that is aligned and responsive to their needs. For example, a third learning circle session

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

- *Recognize and tend to power dynamics.* While learning circles are conceived with an equitable structure whereby all participants have the same right and opportunity to speak (Norton, 2003), the presence of evaluators and funders, who have historically been the power holders in evaluation, may have unintentional influence over what is discussed. This must be named and managed on a regular basis. Further, power dynamics may also exist between partners, due to existing relationships in nonprofit ecosystems and competition for funding. For a learning circle to embody its equitable structures, it is important to invite open conversations about what different actors need to mitigate them, such as power differentials between funded partners due to sector (public, nonprofit, academic). This was not part of the initial design of the KDEIC learning circles, but was an unintentional, added value.

- *Be OK with trying things out and sharing things early.* Being willing to share about learning circles at this stage means that we may not be able to answer questions readers may have. What is the long-term impact? What iterations of this approach might spark other changes in grantmaking practices? What feedback would initiative partners offer that we need to consider? Our transparency in exploring and sharing shortcomings and successes is part of what it means to be an EFF practitioner. The greater goal is reimagining evaluation as a more equitable endeavor and in support of more equitable outcomes.

Conclusion

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

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

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

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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 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

- 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)

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"

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."

- 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).

- Words of wisdom: "I've learned that people will forget what you said, people will forget what you did, but people will never forget how you made them feel." — Maya Angelou

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 Tamanas 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[1] that the Equitable Evaluation Framework™ 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."[2] 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,

[1] See https://changeelemental.org

[2] Equitable Evaluation Initiative. (2023, May 21). EEF expansion: Elements of the EEF. Equitable Evaluation Initiative, para. 2. https://www.equitableeval.org/post/eef-expansion-eef-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 EEF 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 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.

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

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,[3] 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.

[3] 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!

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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.

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.

Overview and Perspectives

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

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

- 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"

FIGURE 3 A SIP participant's "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

> 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.

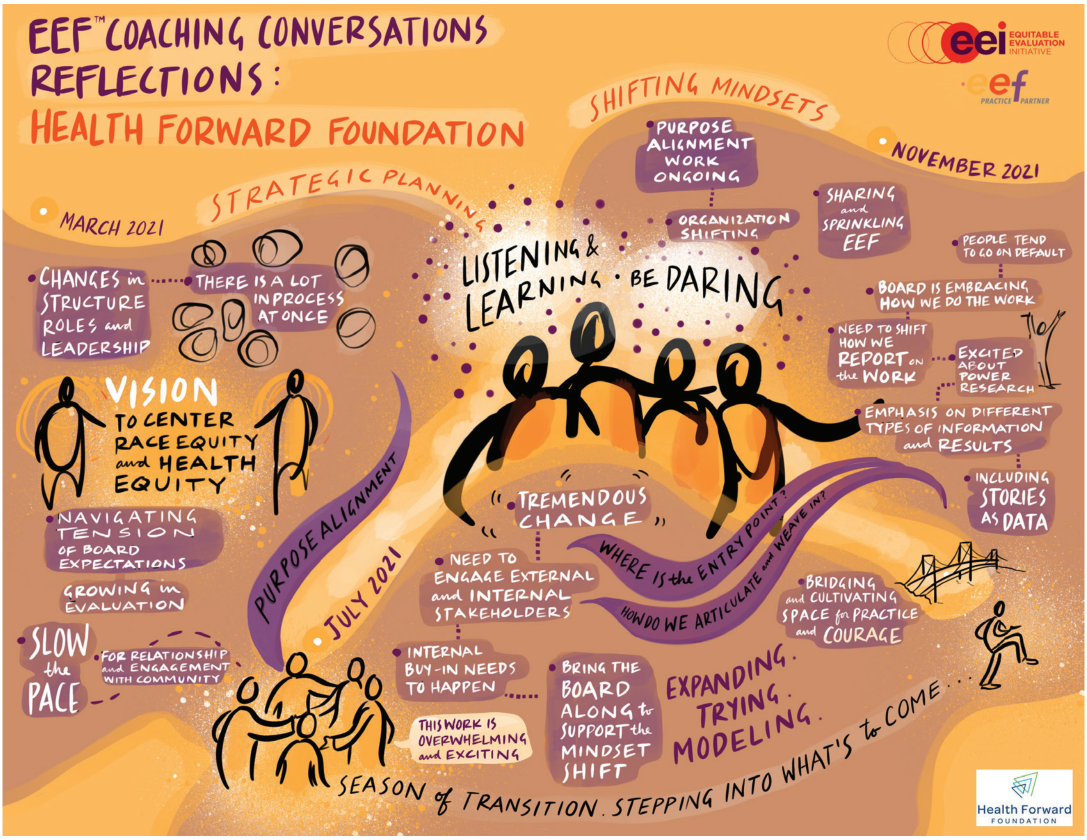
Because it took us time to thoughtfully adjust to input and reflections, Health Forward also contributed to the slower pace of the project. When we received a draft of the project results, we thought we were ready to wrap up and share the findings with our board. Our community advisory team members wisely 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 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?

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.

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

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Keywords: *Evaluation, research, equity, community engagement, equity-focused practice*

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

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.

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

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[.]

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.

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

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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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A Journey Into Equitable Practice: Doing More, Doing Differently, and Doing Better

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Keywords: *Equity, health, evaluation, philanthropy, workplace culture*

Introduction

Structurally and systemically, community-based organizations have historically relied on support from grantmakers to accomplish their missions (National Council of Nonprofits, 2010). In 2021, for example, U.S. philanthropies invested just over $484 billion in the nonprofit sector (Giving USA, 2022; Kresge Foundation, 2008). Critics of this culture of giving, however, argue that a characteristic funder–grantee power dynamic ultimately produces such cumulative behaviors as "white savior complex" (Asare, 2022), and that a just and sustainable system of philanthropic giving requires a fundamental shift toward equity in grantmaking (Washington, 2023).

The mission of the Michigan Fitness Foundation (MFF) is to encourage and facilitate active lifestyles and healthy food choices through education, environmental awareness, community participation, and policy leadership. We support the efforts of more than 50 organizations based in underserved communities to identify community members' health-related needs and deliver programming that meets those needs, primarily via funding from the Supplemental Nutrition Assistance Program and its education component, SNAP-Ed (U.S. Department of Agriculture, 2023), which is distributed to MFF through the state of Michigan.

The MFF funds a variety of agencies and organizations — including Michigan schools and school districts, local health departments, Community-Based Organizations (CBOs), health system foundations, tribal organizations, and food banks — that serve children, teens, and young adults; families; and older adults in eligible settings and communities. Priority populations include Native Americans, people with cognitive disabilities, seniors, the Latinx community, Arab Americans. and immigrants. Priority geographies include rural areas, communities in crisis, and Michigan counties with the highest proportion of SNAP recipients.

Key Points

- The mission of the Michigan Fitness Foundation is to encourage and facilitate active lifestyles and healthy food choices through education, environmental awareness, community participation, and policy leadership. The article shares how a three-year engagement with the Equitable Evaluation Initiative led the foundation to see its grantmaking, programming, and evaluation practices anew through an equity lens.
- Through naming and noticing the ways in which traditional grantmaking has contributed to the inequities that philanthropy seeks to address, the foundation was able to change its own way of working — specifically by going beyond the standard written grant proposal to actually sit with prospective grantees and members of the communities they serve and listen as they describe a vision for a healthier future and how to make it a reality.
- With a grounding in the EEI principles, we were able to share ideas, problem solve, discover what worked and, maybe even more importantly, what didn't, which helped shape our journey, actions, and evolving successes more intentionally. We hope our story will inspire others to take steps toward equity in their work.

Understanding community needs and then aligning programming to meet those needs is core to our approach. As a backbone organization, MFF supports multistakeholder work through training and technical assistance on strategies for meaningful community engagement, collaborative approaches to planning and implementation, the systematic collection of data on community needs and packaging of these data with accompanying solutions, and obtaining evaluation services.

Community-based organizations that receive grant funding are generally held to specific standards or expectations that are known prior to submitting a grant application; often, evaluation is among them (Office of Minority Health, 2010). Grant dollars are commonly used to fund programming that provides social support, so it follows that related activities should also center equity to honor those who receive this support. Philanthropic giving, however, has often served to perpetuate the inequities and inequalities faced by the people seeking such support (Laskowski, 2011/2012). Since benefits and harms co-exist across the levers of philanthropic grantmaking, and since those levers have informed evaluation practices, it is important to name the roots of those harms and document their ripple effects while finding different ways of thinking about and doing philanthropy and evaluation (Zinsmeister, 2016).

The Historical Context of MFF Grantmaking

As a SNAP-Ed grantmaker, MFF is responsible for distributing pass-through dollars to CBOs for their on-the-ground programming. Our grantmaking practice largely mirrored those at the federal and state levels, and we engaged an external consultant to help define the parameters of the proposal process and the related scoring mechanism. The typical funding process, a one-size-fits-all approach designed to ensure objectivity, would begin by announcing a funding opportunity through public channels; CBOs would respond to a standard set of questions, provide documentation, and then submit written proposals if they cleared those hurdles. External content experts would examine those proposals, score them against a rubric, and then meet to make funding recommendations.

[I]ndividual MFF staff were practicing equitable implementation of the program cycle by seeking out community-rooted perspectives on the barriers to active lifestyles and healthy food choices. Yet, there was no common way of applying equitable practice to the program cycle or common language to acknowledge what was happening in the program cycle to honor those practices.

Historically, grantmaking at MFF affirmed independent pathways to practice more equitable grantmaking. Looking back, however, we noticed how traditional, independent, and more equitable pathways started to converge even though the traditional federal and state grantmaking processes and procedures were our North Star. Upon reflection, we noticed how individual MFF staff were practicing equitable implementation of the program cycle by seeking out community-rooted perspectives on the barriers to active lifestyles and healthy food choices. Yet, there was no common way of applying equitable practice to the program cycle or common language to acknowledge what was happening in the program cycle to honor those practices.

This shift catalyzed new ways of thinking about how best to support our local partners. We saw how other organizations were changing their approaches to funding when our foundation applied for a grant and a conversation with the

Our first step was noticing, and the next was naming; without these essential building blocks, there is no way forward.

applicant team that included community members was part of the proposal process. Equity was also brought to the forefront by the collective courage of the global #MeToo movement, the bravery of young athletes from Michigan State University bringing years-old sexual abuse to light, and the nationwide uprising in response to the murder of George Floyd by police in Minneapolis, Minnesota.

While there are things to honor about the historical approaches of our program cycle, other elements were not aligned with emerging movements and changes in viewpoint among our staff, who were already acknowledging misaligned practices and growing curious about how grantmaking and evaluation in particular could be done differently. External factors were also presenting opportunities to reflect on some critical questions. Federal guidance was widening its focus on direct education programming to include broader public health approaches, for example — an evolution that acknowledged the value of programming at multiple levels with the support of federal dollars.

These changes also shone a light on some fundamental tensions — namely, the historical development of processes and practices, passed down from federal and state ways of grantmaking, that anchored structural biases and perpetuated injustices and inequities. It was with this grounding that we became active, engaged participants in the Equitable Evaluation Initiative (2023, 2020), which provided us with framing and structure to name what we wanted to do and be. We were then better positioned to think and do differently.

Our EEI Journey

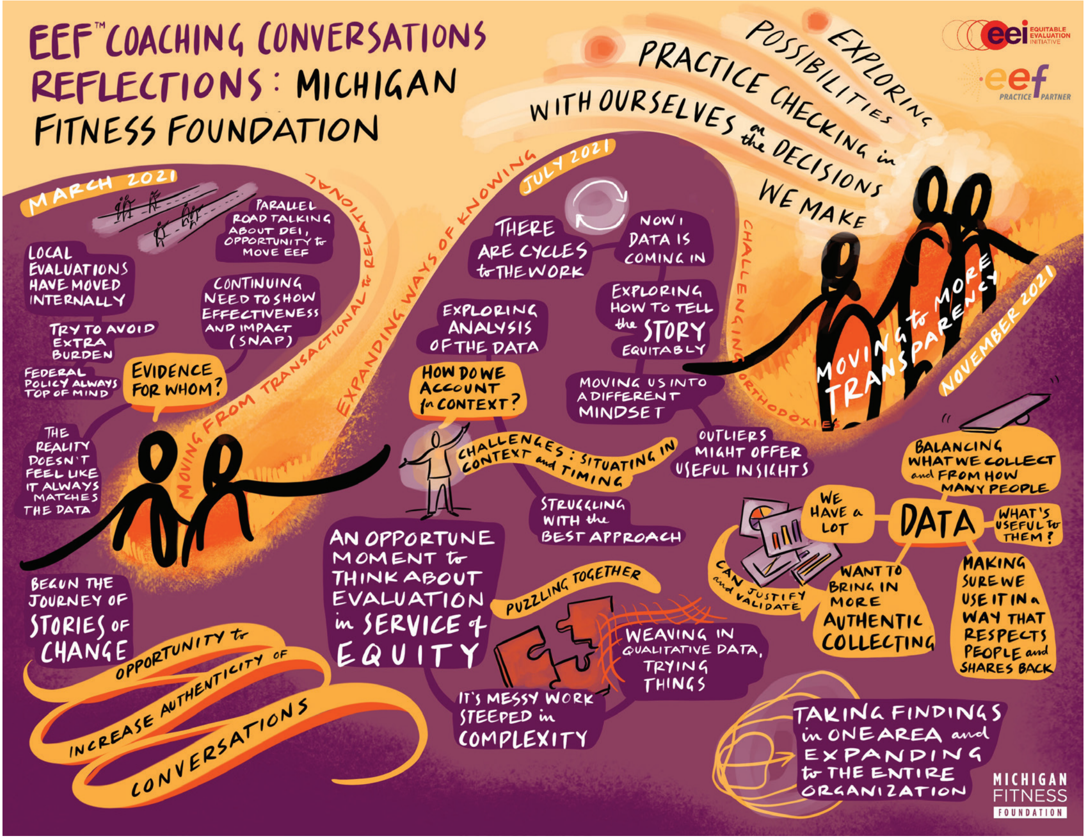
Our EEI journey began when six foundation staff members engaged with EEI coaches and thought curators in ways that involved formal yet flexible time for discussions, readings, podcasts, and peer sharing on equity issues. This experience was a departure from our usual way of thinking and doing. [(See Figure 1). Figure 1 was developed after a coaching conversation in 2022 by EEI resident artist who artistically depicted MFF staff reflections of their equity journey.] Our first step was noticing, and the next was naming; without these essential building blocks, there is no way forward. The naming space is where we explored how orthodoxies and mindsets get shaped for an individual person to acknowledge the curation of historical implications. Among the influences we acknowledged along the way for the individuals who make up the Michigan Fitness Foundation:

- Lived experience
- Institutions
- Teachers and academic learning
- Social structures
- Family, friends, and co-workers
- Media representations
- Community contexts
- Cultural, social, and religious norms

One remarkable point in the journey was being able to notice, name, and nurture the elements of Principle Three (EEI, 2023, 2020):

- the historical and structural relevance of how grantmaking and evaluative practices were designed and implemented,
- how and in what ways orthodoxies and tensions of those practices informed systemic decision-making and practices that influenced population health, and

FIGURE 1 Reflections on EEF Coaching Conversation



Source: Equitable Evaluation Initiative, 2022.

- the ways cultural nuances are woven into structural definitions and the micro and macro steps to doing things differently.

To fold those moments in the journey into constructive conversations on developing a mindset shift would make space for orthodoxies to be challenged and tensions to be acknowledged. This sounded like, looked like, and felt like naming the ways in which typical grantmaking has created inequities in the process — not all organizations have the infrastructure, person power, or access to resources to write a successful proposal within the traditional constraints. Through this naming and noticing we came to acknowledge systemic drivers of inequity that come into play as a result of federal funding strings (e.g., types of programming, reporting requirements) and how those have contributed to how we operate and interact with local partners through the funding process, training, and technical assistance. This exploration also enabled the foundation to acknowledge the ways in which cultural context is tangled up in the structural conditions of grantmaking, thus informing changes to our request for proposal process.

With this grounding in the EEI principles, we were able to share ideas, problem solve, discover what worked and, maybe even more importantly, what didn't, which helped shape our journey, actions, and evolving successes more intentionally. For example, we looked to others in the EEI cohort to learn how they were doing more participatory grantmaking. This was a tangible turning point for us: "If they can do it, we can do it."

These experiences opened us up from binary thinking to multiplicity thinking, and with that came opportunities for different ways

In addition to the traditional written proposal, our RFP process now includes a conversation with representatives of grant applicants and their community partners.

of practicing the art of moving through the program cycle. Doing differently meant being connected to the people touched by each element of the program cycle so that they could inform the grantmaking process. From there we could move toward a mindset of reciprocity where supporting Michigan communities is the priority. The EEI principles were guiding us to rely on, reflect on, and embody a framework that allowed us to free up space to realign our RFP process to meet CBOs where they are — by centering community voice.

Funding Decisions

Traditionally, CBOs propose a comprehensive SNAP-Ed program that meets identified community needs within federal grant guidelines. Proposals, which include a conversation component, undergo an objective review by external content experts who score each proposal on how well the proposed evidence-based programming meets identified needs and whether the organization demonstrates the ability to independently implement the program. Nonprofits who are approved for funding through the Request for Proposals (RFP) process must first demonstrate through a request for application that they meet eligibility criteria for contracted service vendors; it is through this process that MFF attests to its organizational capacity to deliver SNAP-Ed programming in alignment with identified community needs.

To move from the traditional or historical concepts of the RFP and Request for Applications (RFA), we adopted the notion of play to explore new ways of reaching alignment. Sometimes we referred to the "SNAP-Ed sandbox" or "SNAP-Ed painting" to explore a spectrum of approaches. Often this sounded like, "OK, this activity is sort of contained within the boundaries, but what can be created within those boundaries, within those parameters?" To that end, we tried to operate, appreciate, and act using a both/and approach to honor the boundaries while remaining committed to curiosity about where fuller alignment could influence practice. That spirit, combined with the experiential journey, deepened and catalyzed some centering and provided some structure — a compass.

In addition to the traditional written proposal, our RFP process now includes a conversation with representatives of grant applicants and their community partners. The impetus for this was the recognition that the written proposal provided only one way of communicating the work — one that disadvantaged smaller CBOs without grantwriting infrastructure. A written application by itself is not an equitable process for competition.

Adding a funding conversation also helped organizations share not only the "what" of the work, but also the "how" and the "why" — allowing their passion for the mission to shine through. Our application process was further refined to account for varying levels of supportive infrastructure across CBOs that want to submit a proposal for a project that directly impacts the community. The shift helped "color in the lines" of what was presented in the written proposal, and the conversations highlighted how grant applicants had determined the needs of the selected populations and were working collaboratively with communities to deliver programming. In fact, eight organizations who applied through the reimagined application process are now moving through the proposal process independently because of increased organizational and community bandwidth.

In addition to creating a more equitable funding approach, this new system helped build positive relationships between grantors and potential grantees. Overall, community teams appreciated

the opportunity to share their stories and felt the conversation helped to start the relationship off on the right foot. This different way of doing allowed reviewers and MFF staff to hear about the assets, successes, commitment, and intentions of local leaders to change their health environment. And in some cases, reviewers who were not inclined to recommend funding based on a written proposal from an organization changed their opinion after a conversation with the community team. Our new learning was that organizations that do not submit a strong written proposal can be worthy of funding — if we just make space for them to talk!

Ripple Effects

The intentionality to practice promoting equity has become layered into the foundation's norms and values while holding space for the anticipation of more ripples. One way the ripples of practicing EEI has shaped the foundation and the staff of its grantees is through professional development defined by consistent, bidirectional engagement with experts who guide us on how to incorporate equitable practices. Conferences and trainings for local partners have been more carefully curated to prioritize topics and speakers focused on equity principles and strategies for integrating an equity lens into our daily work. These topics included health care and defining social determinants of health, Indigenous communities, implicit bias, data design, and storytelling. Attendees expressed their appreciation for these equity-focused sessions, which emphasized practical strategies for local implementation.

Our evaluation practices underwent a significant shift as we reconsidered through an equity lens the ways we collected and shared data, aiming to ensure our evaluation tools and procedures were accessible and meaningful to everyone involved. We questioned the effectiveness of traditional surveys, asking if there were more inclusive and straightforward methods to gather insights from diverse participants. Our workplace culture also evolved, with staff adopting new language and concepts related to equity in a way that transformed our mindset and approach to planning, programming, and evaluation. An internal

Our new learning was that organizations that do not submit a strong written proposal can be worthy of funding — if we just make space for them to talk!

Work Climate Survey further demonstrated the organization's commitment to diversity, equity, inclusion, and belonging by seeking to learn about the staff's comfort levels, factors affecting retention, and perceptions of workplace discrimination. The findings reinforced the leadership team's dedication to fostering equitable practices within our organization.

Finally, without naming and noticing, the foundation of our communication — word choices, common language — would not have shifted. Language fosters understanding, influences comprehension, nurtures embodiment of feelings, and strengthens cultural practices. The daily language to shape conversations, the choice of words in the practice of grantmaking and evaluation, and the ways of expressing the body of our work across its administration has changed.

We are continually reminding ourselves that the orthodoxies, mindsets, and tensions are about holding space, noticing; that's it's a process — less a reason to catalyze a solution and more to learn ways to normalize the experience and discover postures that happen simultaneously yet with different rates and rhythms. The Equitable Evaluation Framework™ practice is paying attention to what things sound like, look like, feel like, and then acting, practicing, and being present. We are reminded that the practice is emergent and invites curiosity: Who is designing our foundation's practices, and how and to what extent are community members involved? What could be different, and how? At what pace does change feel comfortable?

Conclusions and Implications

We at Michigan Fitness Foundation are doing more, doing differently, and doing better — and being different as we acknowledge and embrace the tensions of releasing orthodoxies and mindsets that are not aligned with the season of our equitable-practice journey. Peer-to-peer interactions developed through the EEI cohort learning model translated into genuine and invaluable connections. If more grantmaking institutions were vulnerable and/or flexible enough to participate in equity training such as the EEI, it could result in an adopted, practiced, and personalized Equitable Evaluation Framework™ that informs the mission, values, policies, systems, and environments impacted by grantmaking dollars.

We spent time learning how to adjust anchored practices of thinking about and doing grantmaking and evaluation to promote and embody equitable, flexible, and honorable practices that more robustly support partners, staff, and community members (MFF, 2023; EEI, 2023, 2020; Office of Disease Prevention and Health Promotion, n.d.; Braveman et al., 2017). As a result of our evolving grantmaking strategy, we are funding organizations that likely would not have been funded in the past based on traditional written proposals alone. Making the written application process more equitable and including funding conversations changed the minds of reviewers, increasing the number of local organizations who received funding. Additionally, the paradigm shift in evaluation has influenced the language used by staff, the methods used with community members, the design of surveys and guides, and the interpretation and dissemination of results.

While the efforts to move from an anchored practice to a flexible practice takes time and commitment, the effectiveness of the work over time has magnified the impact in communities. Changing a grantmaking process to a more equitable one that centers the submitter and not the grantmaker has the power to influence community health outcomes. This is iterative work that has already begun to shape the longevity of partner organizations and influence social determinants of health. Our internal teams and external partners are engaged in this equity journey together. Over time we have felt a palpable shift in mindset and culture, as evidenced through conversations, use of language, and ongoing self-reflection. This collective journey centers people in communities being served — their needs become the focus of our work.

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INTRODUCTION

7 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

13 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 took in practicing EEF.

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REFLECTIVE PRACTICE

25 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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47 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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59 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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70 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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