Introduce yourselves at your tables by answering the Q – What interested you about this session?

This is my 3rd Forum Conference and there is a theme, I talk about the relationship between intention and inquiry. This year there is an added component, how should you think about this relationship if equity is your end game or one of your values.

For my own curiosity, how many of you engage in evaluation? Not member satisfaction.

Our morning looks like this an overview of the history of evaluation in US philanthropic practice, an introduction to EE and invitations for you to think about big questions around intention, inquiry and values... All driving towards creating a prototype plan for advancing equitable evaluative practice in your organization.

An annotated deck will be provided as part of the Forum post conference website.

For today there are two handouts and one worksheet that will we use.
This is important context because much of how consultants and nonprofits think about and engage in evaluation is influenced by philanthropy. There are five key points:

As a field, evaluation was a potential tool to answer questions about government expenditures and the social good they were intended to manifest. It was a way to answer questions related to accountability and how best to use the public dollar. (Mid 60’s)

In thinking about present day evaluation practices, we must consider the when, why and who that brought evaluation to philanthropy in the beginning. Evaluation was one way in which foundations could prevent further inquiry (imposition and interference) in to foundation operations and decisions while also improving and standardizing (to the degree possible) decision making and expenditures related to foundation mission. (70’s)

Shifts in the federal sector (1980’s) left the growing field of professional evaluators without a place to practice their craft. Evaluation regained traction in the 1990’s with professional evaluators saw foundations as a potential audience. They brought to their new work places mindsets, methods and tools that have served them well when conducting evaluation research or longitudinal studies for the federal government or in research institutions.

The meaningfulness and purpose of evaluation has been challenged since the onset. In the 90’s Patti Patrizi pioneered the Evaluation Roundtable and benchmarking work carried on by the Center for Evaluation Innovation with the last publication in partnership with CEP in 2016. Other voices in the include Vu Lee from Rainer Valley Corps and Kathleen Enright from GEO who talked about effectiveness and the ways in which equity and evaluation interact.

Most shifts in evaluative practice has been driven by changes in how foundations talk about their strategies (i.e., responsive, strategic), a deeper desire for evaluation to reflect values (e.g., multicultural evaluation, feminist theory) or a recognition that the who (literally the demographics of the evaluators needs to expand. Almost all of which have been funded and supported by foundations, Kellogg, RWJ. AECF).
Grant's comments yesterday reinforce the message here and the work and opportunity ahead of us.
Evaluation has traditionally been a gatekeeper for one group’s values cloaked as objective and neutral.

What if it were a transparent and transformative competency more inclusive about values and intentional about creating value (how and for whom).

This is a big shift and no single sector can get us there. We have to dive in and be the change.

Equity is not neutral.
In reviewing this slide, note the first square on the top changes everything.

You can go to the EE project page to learn more about it’s evolution.
There is too much at risk not to look at how evaluation is a reflection of and potentially an enabler of racism (and all the other isms). The “isms” are on autopilot - we have to act to change that.

We have to move beyond the demographics of the evaluator and the cultural competence of the methods to re-conceptualizing and expanding definitions of truth, knowing and evidence represent and reflect diversity and inclusion (Eliadis, P., et al. 2011).

We can’t just change who is at the helm of the system, we have to examine and change the system, we need to re-engineer for now and into the future.

### Why it Matters

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<tr>
<th>RACISM</th>
<th>EVALUATION</th>
<th>THE STAKES</th>
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| • is insidious and permeates what we believe to be true and objective | • currently reflects a way of defining, describing and analyzing the world based in history  
• created in a particular moment, informed by the values, experiences and needs of a small group of middle-aged white heterosexual male | • are too high for evaluation not to be an instrument of change and in service of a greater good, equity |
Evaluation as currently practiced is not serving us well.

Non profits find it cumbersome, inaccessible and not meaningful in terms of their work and mission.

Foundation staff don't how to use it. There is a disconnect between what BOD/Trustees want and what is possible.

Efforts to diversity the evaluation pipeline are small and not clear that shifting the demographics of the evaluator leads to different insights, and greater value and transformation.

We have to start a new.

And when I say, we, I am speaking specifically to those of us for whom this work (our work) is about creating a world in which all can thrive.
We all knew that when people say equity, they mean different things.

In this instance, we mean both means and ends.

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**Equity**

1. **MEANS** — Deep equity means working toward outcomes in ways that model dignity, justice, and love without re-creating harm in our structures, strategies and working relationships
   — MAG

2. **ENDS** — Equity is the absence of avoidable or remediable differences among groups of people, whether those groups are defined socially, economically, demographically, or geographically.
   — World Health Organization
That was lot to ponder.

What I want you to think about is the question above and hidden in that question is the assumption that you have an evaluation philosophy. You have to make it explicit in order to compare with EE.

You can refer to Handout 1 for the EE Principles.

Take the next 5-7 minutes to ponder and discuss at your table.
Some of you may remember this from a previous session. This is a way we at Luminare Group think about evaluative practice and we do so because it supports situating your inquiry in your organizational purpose and values and to use discernment in key question, methods and use.

As an FYI, most organizations across sectors spend much of their time in conduct and little on the other three phases.

Translation, they start an evaluative discussion with ... I want to do a survey as opposed to having identifying some strategic questions important to answer for mission and then figuring out when is the best time to ask, who to ask, how to ask, how the information will be analyzed, who will make sense of that information, how it will be shared (and by whom), etc.
Moving to EE is not going to be easy.

It requires a way of being and thinking that is grounded in a moral imperative (equity as an end not only a means) and embraces the complexity of identities. It will challenge ideas of validity and rigor, which codify bias and ways of knowing, truth and evidence as objectivity.

If equity is in fact the moral imperative that more of us are gravitating towards, it requires that we look inside at the ways in which our practices and ingrained white racial framing prevents evaluation from being as powerful tool as it can be in service of our missions.

This also means that evaluators have to fight the tendency to like checklists and toolkits moving to methods too quickly. They have to be willing to re-construct and hold multiple definitions of truth, evidence and knowing.

And for nonprofits and communities, their intelligence, insights and interaction are essential to evolving evaluation practice.

This is all of our work.

Data and information are power. Evaluation is an expression of that.
So here is a way to see the EI cycle as a frame for a set of questions that infuse equity into the full evaluative process not just the demographics of the evaluator, the language of the tool and the type of dissemination.

Any questions?
Now go back to your organization and think given how you answered Q1, who or what would need to shift (to move towards EE).

Don't think about the how.

That is coming.
Ok now that you have a sense of the who or what, and some initial reflection on your evaluation philosophy in relationship to EE, I want you to spend some time thinking about what you might do.

This worksheet is based on a Design Thinking framework,
1. Name the challenge Be as specific as possible.
2. Identify an occasion in the next three months where you have the opportunity to move and influence something
3. Given the who/what and potentially when, what do you know or suspect might need to be considered, For instance, I was having a conversation with foundation staff in Portland and one of their insights was the “board only listens to other boards” which is why all their efforts to show data and findings from community inquiry fell on deaf ears.
4. What Will I try..Again, be specific and not grandiose. 2-3 things that are within your sphere of agency and influence.
5. Now think of both sources of support and challenge.

Take 15-20 minutes on this. When you are ready, make meaningful but non confrontational eye contact with someone at your United Philanthropy Forum Annual Conference
table (or across the room) and chat about what you are thinking,. Be peer coaches to each other,
What was it like to plot out a prototyping plan?

What kinds of design challenges did people name? Supports and challenges?

What was it like to share your idea with a colleague?

Encourage you to find someone at your table or in the room to be your buddy in moving this work forward so you can share stories and be a partner in navigating the politics, personalities and practices needed to rethink evaluative practice in service of equity.
As you all know, we are at a pivotal moment in our nation’s history, We have to rethinking EVERYTHING and decide what we are going to COMMIT to and hold as sacred and non negotiable.

How we think about knowledge, evidence, evaluation is part of that interrogation and we think evolution.
To that end we invite you to join us in this work. And specifically as PSO's you have a unique role and those who hold a mission and with members who you influence.

Join Us

EE Project Website: [https://www.equitableeval.org/](https://www.equitableeval.org/)

Twitter Hashtag: #EquitableEval