Equitable Evaluation is an opportunity for all of us to challenge norms in philanthropy and its’ partners (nonprofits, PSO, consultants) with acceptable evaluation practice that not only reflects but is in service of equity. It does this not only by the HOW and WHY of evaluation practice but also by the WHAT through:

1. Answering critical questions about the effect of a strategy on different populations, on the structural drivers of inequity, and the ways in which cultural context is tangled up in both the structural conditions and the change initiative itself.

2. Designing and implementing evaluations in a way that is commensurate with the values underlying equity work: multi-culturally valid, and oriented toward participant ownership and empowerment.

By broadening our definitions of validity and rigor and addressing complexity (as opposed to controlling for it) the EE principles have the ability to offer more accurate, and useful/influential evaluations. It strengthens our inquiry especially in complex social enterprises.

Specially within the 5 years the Equitable Evaluation Initiative strives to:

- Reframe evaluation as a tool for equity (as opposed to merely a way to measure progress towards equity) for those who have equity at the center of their work.
- Shift the current leadership development framework (across the EE ecosystem) to one in which evaluative thinking (not evaluation) is a core competency.
- Have a 5-year infrastructure in place that supports and advances:
  - The imperative of putting EE principles into practice
  - Cross-sector learning and shared leadership through multiple types of engagement
  - New definitions of rigor and validity appropriate to 21st century social change efforts
  - An array of materials, resources and practices that reflect EE Principles
  - Demonstrations of the ways in which pursuing EE advances commitment to equity

Partners are essential to EEI’s work and progress and are characterized as Practice Partners, Field Partners and Investment Partners. Following is the active set of Partners.

- **Field Partners:** Individuals and organizations amplifying the intent and efforts of EEI through their social capital and in service of their members and audiences. Grantmakers for Effective Organizations, Center for Evaluation Innovation and Johnson Center for Philanthropy and Associations for Equitable Evaluation (pending).
- **Investment Partners:** Individuals and organizations contributing financial resources in service of EEI. WKKF (Founding), Ford, Seattle Foundation, Talent Citizen, The California Endowment. The Kresge Foundation, McKnight Foundation, James Irvine Foundation, SD Bechtel Foundation.

EEI is resourced through a combination of general operating support and fee for service. Annual estimated budget at full scale is $1.5M.

**EEI currently seeks partners of all types.**

For more information, contact Jara Dean-Coffey, EEI Director

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### Initiative Home/Director

EEI is Directed by Jara Dean-Coffey, MPH. It is housed at the Seattle Foundation with investment currently received in the Area Interest Fund- Equity in Evaluation. Sally Gillis, Managing Director is the Foundation Lead.

### Advisory Committee

Select EE champions to provide guidance and advance the field *(2018- Talent Citizen is supporting EEI in this work)*.

### Make the Case

Clear articulation of why EE and invitation to dive in. This calls for multi-faceted communications strategy potentially including: campaign-like messaging, sticky video, social media, peer-reviewed journals and open-source materials. *(2018 - What’s Race Got to Do With It? Equity and Philanthropic Evaluation Practice; 2019 - developing joint publication with GEO highlighting experiences to date around EE)*

### Develop Resources

Rooted in the EE Principles, orthodoxies, and applying Evaluative Thinking. Potentially including: self-reflection, new definitions, examples, tools for integration, guidance on use, RFP language. *(2018 - Emerging Learnings from Practice Partners starting November; 2019 - translating resources developed with Practice Partners for field use)*

### Keystone Programs

EEI designed and facilitated Collaboratories:

1. Cross-sectoral (philanthropy, nonprofit, and consultant/evaluator) to explore and advance EE across their ecosystem. *(2019 - there are two in play)*
2. Peer-2-Peer Collaboratories to provide philanthropy, consultant/evaluators and non-profits, respectively, to explore EE more deeply. *(2019, will launch one for philanthropy and consultants/evaluators)*
3. Bi-monthly Peer Learning virtual Clinics

Teaching Case development highlighting a particular entry point to integrating EE *(2019 - Kresge’s FreshLo Initiative in partnership with GEO)*.

Bi-annual Roundtables and Final Year Conference *(2019, 2021, 2023)* Face-to-face convenings to evolve work; advance maturity of practice.

### Provide Direct Support

Offer a menu of services to do deeper EE work based on need, interest, group. Potentially including: Learning Sessions, Design Labs, Trainings.

### Orient and Refer Consultants

Identify, equip and promote consultants to be EE practitioners. Provide orientation to EE materials and accessible consultant referral list.

### Leverage the Field

Create unique strategies for allied PSOs to amplify the work. This includes conference presentations, materials sharing/nesting, cross-posted communications, shared advisory leadership. *(2019 - pending GEO Learning Conference, Change Philanthropy Summit, Evaluation/EE Curriculum Piloting led by Philanthropy New York)*

### Provide Evidence

Demonstrate that EE "works", including short and long case studies, peer reviewed journals, video. *(2019 - developing joint publication with GEO highlighting experiences to date around EE; 2020 - potential Foundation Review special issue)*

### Amplify and Connect

Elevate communications as core strategy to advance all others. Develop inspiring website “front door” for engagement and resources; employ creative strategies to make the case; share tools and provide evidence. Create integrated social media strategy to lift EEI and promote dialogue and allied work across the field. *(2018- Website and Twitter launched)*