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Monthly Newsletter
October 2017

THE NONPROFIT NERD

Research you can use.

This month's theme is Equity in Evaluation!

If you've been following along the past few months you may have seen that NPI is working with the latest cohort of our Professional Certificate in Nonprofit Program Evaluation to bring evaluation tools into their organizational equity work. Measuring progress toward our goals is a critical part of every organization's learning, improvement and accountability to the communities we serve.

But what about the equity implications of how we actually do evaluation? What does it mean to employ an equity lens in our approach to evaluation itself—the questions we ask, the data we collect, and how we interpret what we find? How do we decide what counts as evidence, and how do we focus our attention where it matters most?

This month, we're excited to introduce you to Jara Dean-Coffey of The Luminare Group, who joins us to talk about the Equitable Evaluation initiative and how it is shaking up the philanthropic sector. We hope you'll find this topic as interesting as we do, and that you'll share your thoughts with us!

Let the resources and insights we share in The Nonprofit Nerd inspire you to get your nerd on and find innovative ways to make research and data work for you and your nonprofit!



NERDS AT WORK



This month we feature an interview with Jara Dean-Coffey, Founder and Principal at [The Luminare Group](#), on the recently launched [Equitable Evaluation](#) initiative.

For those who aren't familiar with the Equitable Evaluation initiative, can you give us a bit of background? How did this project come about? Why is it important?

In 2012, we were engaged by a national foundation that was on the early stages of exploring how it would further integrate diversity, equity, and inclusion into its' overall operations. So we talked to other large foundations to learn from them, and one of the things we noticed in that inquiry was that very few if any of them talked about evaluation. A light bulb went on. We subsequently wrote a [paper published in 2014](#) in The Foundation Review based on that "aha" moment and expressed the desire, on our part, for evaluation practice and philanthropy to move beyond cultural competence towards equity. We coined the phrase "equitable evaluation," which stems from international development evaluation, where they call it "equity-focused evaluation." We secured funding for the Equitable Evaluation project from the W.K. Kellogg Foundation in 2015. In that same year we dove back into philanthropy, this time focusing explicitly on foundations with a stated commitment to equity, and wanting to learn if and in what ways that commitment was manifesting in their evaluation practices. It was a collaborative effort with [Johnson Center for Philanthropy](#) and the [Center for Evaluation Innovation](#).

Your recent [Framing Paper](#) notes that the philanthropic sector reflects certain "orthodoxies" or tightly held assumptions about evaluation. What are some of these assumptions, and what have been some of the consequences for nonprofit organizations?

At this point we have identified 12 orthodoxies that get in the way of adoption of Equitable Evaluation (EE) principles ([see here](#)). Nine orthodoxies surfaced through the research, and then in the round table where we brought together about 30 people in August 2017, three more orthodoxies surfaced. I think the ones that are most relevant for nonprofits are the following:

The foundation defines what success looks like. The implication here is that the nonprofit has to prescribe to a predetermined definition of success, that may or may not align with their kind of internal programmatic definitions of success. And because of the power dynamic between the nonprofit and the foundation, the nonprofit will most likely bend and comply to meet the foundation's definition, which in some cases may mean that it's taking them off their core work in order to get funding. In other cases it may mean that unbeknownst to either one of them, what the nonprofit has defined as success may actually be a more accurate, reasonable, appropriate definition, but they didn't offer that up, again, most likely because of the power dynamic.

Another one of the orthodoxies that surfaces is that *the foundation is the primary user of the evaluation*. The implication here is that the process and the products that will result from the evaluation are often not considerate of or useful to the nonprofit. Several times over the past few weeks and in different settings, I have heard people reference evaluation as an exercise in "extraction." Clearly that perception, and in some cases reality, is at odds with the EE principle that *Evaluative work should be designed and implemented in a way that is commensurate with the values underlying equity work: Multi-culturally valid and Oriented toward participant ownership*.

In some ways all of the orthodoxies have relevance to the nonprofit sector, as they influence the ways foundations conceptualize, resource and utilize evaluation, but the ones I mentioned are top of mind at the moment.

You recently held a [Roundtable gathering](#) in Detroit to explore these ideas with others in the philanthropic sector. What were some of the big takeaways from the day? Anything that surprised you?

In addition to the three new orthodoxies identified at the round table, because there were also evaluators in the room, we were able to talk about what we could do differently to support adoption of equitable evaluation. We evaluators also contribute to perpetuating these orthodoxies by who we hire internally; by how we talk about what we do, using terms such as 'self-report' or 'story', as if they are less valid or meaningful; and by not challenging some of the ways foundations want us to do this work, seeking generalizable findings, assuming the role of expert, or not being explicit or transparent about our biases and assumptions. I think that was one of the big 'aha's.

What is your advice for nonprofit professionals who are interested in starting a conversation with funders about expectations around evaluation approaches or metrics? How might they start that conversation?

The experience of many nonprofits as it relates to evaluation is that it feels like something done to them in which they have little agency and from which they get little value. Their relationship to evaluation—as an instrument of their own clarity and to define their own impact—gets twisted. I think one of the roots of this is our current leadership development paradigm for nonprofits. We often do not elevate evaluative thinking as a critical competency for individuals, leaders, and in a capacity, for organizations, be they foundations or nonprofits. We default evaluative thinking to consultants/evaluators who, as I shared earlier, are part of the orthodoxies. We ALL need to be part of the re-imagining of new ways to engage in evaluation that serves a higher purpose such as equity.

To have a meaningful conversation around this, I believe the nonprofit has to come to the table with its own evaluation framework. Every mission-driven organization should be interested in, and engaging in, evaluative practice. How do we know if we are making a difference and making progress if we do not engage in some type of evaluative work grounded by outcomes we define that reflect our own values? If a nonprofit has done its homework, then the conversation with its foundation partner becomes focused around alignment or, even better, co-creation. We offer [capacity building](#) to support nonprofits so that this is possible. In full transparency, we think equitable evaluation is simply good evaluation in the 21st century.

What are some of your next steps in this work? For those who want to learn more, how can they follow your progress?

The EE project was one year, and we're moving into the initiative stage thinking about a longer window for this work. We will be refining our theory of change (yes we have one) with the ultimate end being the adoption of equitable evaluation within philanthropy, focusing on those foundations who have stated that equity is not only a value but a desired outcome. We are in conversation with foundations interested in and willing to explore what it looks like to put equitable evaluation into practice within their own foundations. Hopefully that work will start this winter. Super exciting. Later in October we are kicking off a related piece of work with the Johnson Center for Philanthropy (funded by W.K. Kellogg Foundation) to explore how to bring equitable evaluation into the nonprofit space, most likely through leadership development. You can follow our progress by subscribing to the [Luminare Group](#) and

[Equitable Evaluation](#) newsletters, follow [myself](#) and [Luminare Group](#) on Twitter, and check out [our blog](#).

Know someone you'd like to see featured in the Nonprofit Nerd? Tell us who and why!



RESEARCH SPOTLIGHT

The [Evaluation and Society series](#) has several recent publications on equity in evaluation that we recommend checking out. In particular, their [Evaluation for an Equitable Society](#) explores the increasing calls to action to employ evaluative tools not just for accountability and program effectiveness, but to facilitate and accelerate social change. The authors take a critical perspective, exploring the importance of acknowledging power and perceptions of legitimacy in our work, and the conflicts of interest and other tensions that can arise from how evaluation work is funded.

In Robert Wood Johnson Foundation's recent [Knowledge to Action](#), a collection of authors from across the field of population health came together to reflect on 'Pursuing Knowledge with Purpose'. They discuss the 'tyranny of evidence' that can emerge from rigid standards and rules about what makes for good evaluation, as well as the knowledge lost when communities lack channels to share learning and data across sectors. They also explore how approaches like Human Centered Design, Systems Thinking and Community-Based Participatory Research can shift the conversation around evaluation, centering communities as the drivers and beneficiaries of knowledge creation. [You can order a free copy of this text here!](#)

Finally, in addition to their own publications (some of which we've highlighted above) the Equitable Evaluation initiative has compiled a terrific [resource library](#) that we definitely recommend checking out! The resources they've collected explore both the theoretical foundations and assumptions behind how and why we do evaluation, as well as practical tools for evaluations that are culturally responsive and multiculturally valid.



INSTITUTE NEWS

- If you haven't yet taken our [survey on Using Data in Nonprofit Work](#), please share your thoughts by 10/31! (*you don't need to be a data geek to participate—we want to hear from you!*)
- We're delighted to announce that Jenna Oh and Kelly Coates are [NPI's newest team members!](#) Welcome Jenna and Kelly!
- If you missed the deadline to apply for this year's Professional Certificates in Nonprofit Program Evaluation or Nonprofit Fundraising, [let us know](#) and we'll add you to our interest list for next year.



FELLOW NERDS

If you're interested in learning more about equity in evaluation, NPI recommends you get to know the great work of these fellow nerds!

[The Luminare Group](#)

[University of Illinois Center for Culturally Responsive Evaluation and Assessment](#)

[Center for Evaluation Innovation](#)

[UNICEF's EvalPartners' Virtual Resource Library](#) on equity-focused evaluation tools

If that's not nerdy enough for you, check out [our local and national friends](#) and the great research, data, and best practice resources they have to offer.



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