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## 9. It's about more than equity: Equitable Evaluation Framework®

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What if that which underpins what we believe no longer serves us? What if evaluation embraced myriad ways of knowing, multiple coexisting truths, and a moral purpose? How might individuals and organizations respond to such an invitation?

Those kinds of questions sparked my curiosity about how evaluation could reflect and result in expansive awareness and equitable practices. In this chapter, I describe how I worked with others to begin to recalibrate our thinking about the role evaluation can and should serve in knowledge development and societal advancement within the context of the US settler-created philanthropic complex and hopefully beyond. One of my desires was for the Equitable Evaluation Framework to develop in the wild, grounded in practice and praxis. What I offer here is a story of something alive and evolving. Others have been part of the story and have their own perspectives; this is mine. For those curious about the present-day Equitable Evaluation Framework and related efforts go to <https://www.equitableeval.org/>. Writing about the origins of something purposefully seeded outside of the academy in an academic publication brings tensions, particularly when the topic is evaluation. There is often a preference for linearity and detachment; however, this is a story of change which is relational and dynamic, and as such the tone and tense shift accordingly and appropriately.

To begin, I want to introduce and situate myself in this work. We all shape and are shaped by our histories and contexts. There remain deeply held post-positivist leanings in the evaluation field that assert that who you are in the witnessing and interpretation of a phenomenon has little to no bearing. That simply is not true. Who we are, who others are not, as well as how we are received and perceived matters. It alters the nature of the experience and our understanding of it, which if we are aware of and honest about, enhances rigor.

I am Jara Dean-Coffey. I have worked within (or at the edges of) the US philanthropic ecosystem for the past 30 years in myriad roles. I find myself struggling with how to describe myself, as the labels of the past reflect constructs that deny my full humanity and do not capture the heart and intention of what fuels me. So, I offer you this: I am Jara, a descendant of free, stolen, and enslaved peoples, and can trace my lineage back to the 1600s. I desire a world where, among a host of things, who we are is welcomed, honored, and reflected in how we co-create and use knowledge. I wish us each to move beyond narratives that limit, and towards collective possibilities reflecting love and abundance. I do not believe that all things can be known and am perhaps more comfortable than many with ambiguity and emergence. I desire a world where dragons fly, again, amongst us. I can be objective, but I am never neutral: I believe evaluative practice has the potential and the responsibility to deepen and expand how and what we understand, so that as a species we might live in greater harmony on a planet we share with other beings.

## EQUITABLE EVALUATION FRAMEWORK CONTEXT

Much of science as we know it is about removing what is personal (human) and contextual to reduce bias and improve generalizability. In some contexts, and for some pursuits, that makes sense and works well enough. However, as our energies and efforts are directed towards social, communal, systemic, and structural conditions and their interplay, it's critical we acknowledge and understand the decisions, policies, and historical contexts that brought us to today. By imposing an artificial distance and deeming only certain types of information (often from certain types of individuals) as relevant and reliable, we miss the nuance and complexity that is part of and derives from human experiences which are part of the natural world. Detachment and decontextualization, rather than bringing clarity, remove essential parts of the formula that is life, and there is a noticeable pattern in what and who is removed.

In my experience, the prevalent paradigm for evaluation practice continues to tend towards positivist and post-positivist worldviews in terms of definitions and expectations around validity, rigor, bias, and objectivity. Honoring particular types of knowledge, evidence, and truth above others, rather than alongside others, limits our ability to understand what is happening around us, with us, and because of us. This limitation often results in an evaluation being disconnected from the knowledge and values within a specific context and its history, reducing the appropriateness, accuracy, and applicability of the evaluation (and the evaluators).

For example, the United States is born from structural racism in which the white racial frame has been normalized as the default “right” or “best” way. Feagin (2013) offers that the white racial frame is “an overarching white worldview that encompasses a *broad and persisting set of racial stereotypes, prejudices, ideologies, images, interpretations and narratives, emotions, and reactions to language accents, as well as racialized inclinations to discriminate*” (p. 3, emphasis in original). As indicated by Gordon et al. (1990), assuming and applying the white racial frame immediately introduces limits to what we ask, see, and conclude, thereby limiting the scope of “truth” to which we have access. The same could be said about capitalism: the capitalist underpinnings of US social history have influenced what is valued and seen as “good.” An example of this can be seen in approaches that focus on the financial aspects of initiatives such as cost-benefit analysis and return on investment. Capitalist influence can also be seen in the belief that the quantity of something is more important than the quality of it, as well as who benefits and in what ways.

What we see as “right” and “good” is shaped by deeply embedded values that we may not be aware of, much less share among each other. Roorda and Gullickson (2019), drawing on normative ethical theories, offer a take on the importance of making values explicit. They propose ideas for making values explicit and connected to both the focus and practice of evaluation in context. Particularly provocative is their inclusion of non-human perspectives. Doing so and exploring systematic and structural barriers shaped by factors such as racism and capitalism (along with many other “isms”) enable us to be more intentional in how we think about and apply standards of validity and rigor. While this is not new, shifting practice is not a small endeavor. I wanted to go to the root of the effort, and in some ways start afresh. I was curious about ways we might begin.

The evaluation field has tended to focus on methodology, with most evaluation training programs focused primarily on methods (LaVelle, 2018). This methodological focus has been on the “how” of evaluation, with little attention to axiology (how we decide what is good and right), ontology (how we decide what is real), or epistemology (how we decide what to regard

Table 9.1 Key terms

| Term                        | Defining question                                 |
|-----------------------------|---|
| Axiology (Value)            | How do we decide what is good and what is right?  |
| Epistemology (Knowledge)    | What information do we regard as credible?        |
| Ontology (Being/Reality)    | How do we decide what is real?                    |
| Methodology (Systems/Rules) | What information systems and sources do we trust? |

as credible). Assuming certain methodologies are more valuable and dependable writ large, and not being explicit about the axiological, ontological, and epistemological underpinnings (and tensions) within a specific context, create the conditions for assumptions, inaccuracies, and even harm. Changing practice is deeper than switching up methodology. From early on, I knew there would be a desire for a toolkit or a guide focusing on “how to.” I believed (and still do) that what would bring us somewhere different was situated foremost within each of us.

As Symonette (2009, p. 1) wisely noted, “bringing a well-endowed professional toolkit is surely necessary but not sufficient. Even if top-of-the-line, that expert toolkit is all for naught if not complemented by interpersonal validity-enhancement work, i.e., the soundness and trustworthiness of the uses of self as knower, inquirer, and engager of others.” As Lorde said in 1979, and was later the title of her 2018 book, “The master’s tools will never dismantle the master’s house.” The change required is about far more than the tools we wield. In fact, by focusing on tools (or methodologies for that matter), we miss the bigger and sometimes smaller, and more meaningful, insights. Significant change in practice requires significant changes in being, thinking, and doing, as it is we who are the instruments of change (the most important tool). Who we are and the context in which we are situated influences the work we do; using a different methodology does not change that influence. Knowing and acknowledging those limits, and recognizing the importance and value of other perspectives, enhances our understanding and ability to address complex issues and, as Donaldson and Picciotto (2016) put it, to implement evaluation approaches that serve socially just ends.

I became, and remain, curious about how we might welcome a variety of perspectives and embrace more ways of knowing to develop a more accurate and nuanced understanding of the world in which we live and how we shape it. I wanted to encourage reflections on and engage in conversations about axiology, epistemology, ontology, and methodology (see Table 9.1) and how they influence evaluation practice. The Equitable Evaluation Framework (EEF) was envisioned as one way to provide guidance for centering the multiplicity and complexity of our collective human experience. It came into being during a time when much was happening in the United States, including the election of a new president, Women’s March, #MeTooMovement, rise of white nationalism countered by #BlackLivesMatter, Hurricanes Irma and Maria, and more. All of this contributed to an environment in which institutional philanthropy paused to reflect on its origins and core practices. EEF invites us to reconsider how and why we gather and make sense of information, as individuals and collectively.

EEF is part of my desire to change the conversation about how we conceptualize and utilize evaluation. It feels like the height of privilege for evaluation to not be in service of something more than data and information, particularly in philanthropy, a word with an etymological origin of “love of humankind, especially as evinced in deeds of practical beneficence and work for the good of others” (<https://www.etymonline.com/word/philanthropy>). In my mind and heart, evaluation should be an explicit expression of values and a more robust commitment to

a world in we all thrive. It took a long time to arrive where we are; it will take time to change our trajectory. There are possibilities we have yet to imagine.

### **Historical Context of Evaluation**

Before we can get to what might be possible, we must acknowledge the current state of evaluation and how we got here. This grounding is key to untangling how the beliefs and assumptions that influence (and limit) our ideas about what and who is valued and valid came to be. These influences manifest themselves in every facet of evaluative work: from what is evaluated, to who conducts evaluations, to what and how information is gathered, to how information is shared, interpreted, and used and to what end(s). Early evaluation literature in the US was dominated by a narrow demographic: namely, middle-class white cisgender heteronormative able-bodied men. Who they were, what they did, and their motivations and intentions influenced the focus of and perspectives on evaluation (Dean-Coffey et al., 2022).

The evaluation profession in the US primarily grew out of the desire to gauge the effectiveness of large federal government investments in social programs, such as those focused on education and healthcare reforms (Preskill & Russ-Eft, 2015; Shadish et al., 1991). The scientific method was applied with a keenness to bring “hard” scientific approaches to social sciences to drive change responsibly. While there was an underlying desire to create and reinforce social good, evaluations were focused on program effectiveness (particularly cost-effectiveness) and not on the underlying structural and social policies and practices that led to and maintained the problems that programs sought to address (Dean-Coffey, 2018).

Beginning in the 1980s, as federal investments in social programs declined, evaluators required a new place to practice. Even though the context shifted, evaluators brought with them the mindsets, methods, and tools that had seemingly served them well when conducting evaluation studies for the federal government or in national research institutions. Their orientation towards programmatic and individual-level changes meant that they often did not look outside of those frames to understand the contexts and conditions that led to the issue being evaluated. This includes the relationship between capitalism and government, and how policy and political decisions (made or not made) have contributed to many of the issues which some in the philanthropic ecosystem seek to mitigate (Mathison, 2018).

Even while reflecting values and contributing to societal advancement (albeit from a privileged post-positivist perspective), evaluation became even more of a tool for knowledge (and power) gatekeeping with a Western-centric, white-dominant frame as well as strong capitalist and patriarchal undertones. I have written about that elsewhere (Dean-Coffey, 2018), as has Shanker (2019). For those seeking a deeper understanding of the rich and turbulent history of the intersection of evaluation and social justice, Mertens and Wilson (2018) provide an overview of the social justice paradigm in evaluation. Chapter 6 in this *Handbook* on cultural responsiveness in evaluation offers additional historical and theoretical context. While there have been shifts (and backlashes) in practice over time, my position remained that a systemic and fundamental transformation was required, and there were opportunities to do so. I started imagining ways to inspire and invite shifts.

While evaluation can function as a gatekeeper of knowledge and expertise, it can also be an entry point for evolving our understanding of ontological and epistemological perspectives so we can construct knowledge in more inclusive, accurate, and useful ways (Hopson et al., 2012). While that evolution includes conversations about methodology, my focus was not on

the methodological toolbox of evaluation, but on the fundamental purposes and practices of evaluation (Equitable Evaluation Initiative & Grantmakers for Effective Organizations, 2021). We construct (and I suggest co-create) knowledge in a variety of ways. Definitions of validity, rigor, and objectivity permeate how we engage in many kinds of endeavors, such as strategy, communications, programming, etc., all in environments ranging from simple to complex. My focus on evaluation was merely a place to start. There were opportunities in the context within which I was primarily operating, and ways in which my positionality might be useful.

### **Philanthropic Sector in the United States**

Two factors led to my focus on the US philanthropic sector as the potential place of experimentation: (1) there is great latitude to determine what philanthropists focus on and how they do their work (Hall, 2004), and (2) philanthropists have the resources and positioning to make and catalyze significant shifts in how we collectively conceive of and maximize opportunities, and how we address challenges. A year after the Equitable Evaluation Initiative (EEI) officially launched, the COVID-19 pandemic arrived, amplifying the existing afflictions of structural racism, income inequality, climate injustice, and more. The pandemic brought to light what many had already known and experienced, and made it more difficult for foundations (and nonprofits) to play on the sidelines, as the implications of this new reality could not be ignored or hidden and the resources for change were there.

In 2021, foundations gave almost \$91 billion (which is a fraction of overall assets), and donor-advised funds held \$159.83 billion in assets in 2020 (Giving USA Foundation et al., 2021; National Philanthropic Trust, 2021). However, as recent critiques of philanthropy such as those from Villanueva (2018) and Giridharadas (2018) note, philanthropy has grown from and was founded on the very systems it often seeks to change, thereby creating built-in reluctance, structural impediments, and even resistance to change. As with evaluation, knowing the history of how philanthropy came to be is important to imagining how it might be different (Dean-Coffey, 2018). Exploring how we collectively gather, filter, and make sense of information is a fundamental part of the learning and evolving that is part of many philanthropic missions. Resistance is a precursor to change and when encountered, it should be accepted as such. It is a signal that something of significance is being challenged and differently explored, and hopefully of movement towards something else.

### **Evolving and Contextualizing Validity and Rigor**

Historically, the concept of validity is rooted in white-dominant and capitalist culture, with a strong preference for quantitative expressions of what is determined to be real and true. As such, validity began as something narrowly defined – too narrowly, as it turns out. When we fail to embrace the multiple realities and truths influenced by power, context, systems, culture, history, and our own relationship to each of these, we reinforce (inadvertently or not) oppression and sustain many of the structural and systemic policies and practices which are the root of the issues our efforts are supposedly designed to illuminate, mitigate, or eliminate.

The importance of expanding our notions of validity is not new in evaluation (see Chapter 5). Kirkhart (1995, 2010), building from Messick's (1989) concept of consequential validity and Reason and Rowan's (1981) interpersonal validity, expanded the concept of validity to center culture and include additional considerations to bring greater congruence between

Table 9.2 *Components of rigor*

| Component                                 | Description   |
|---|---|
| Quality of the thinking                   | The extent to which the evaluation’s design and implementation engage in deep analysis that focuses on patterns, themes, and values (drawing on systems thinking), and literature, and looks for outliers that offer different perspectives, seeks alternative explanations and interpretations, and is grounded in the research. |
| Credibility and legitimacy of the claims  | The extent to which the data are trustworthy, including confidence in the findings, transferability of findings to other contexts, consistency and repeatability of the findings, and the extent to which the findings are shaped by respondents, rather than evaluator bias, motivation, or interests.                           |
| Cultural responsiveness and context       | The extent to which the evaluation questions, methods, and analysis respect and reflect stakeholders’ values and context, their definitions of success, their experiences and perceptions, and their insights about what is happening.  |
| Quality and value of the learning process | The extent to which the learning process engages the people who most need the information, in a way that allows for reflection, dialogue, testing assumptions, and asking new questions, directly contributing to making decisions that help improve the process and outcomes.  |

Source: Adapted from Preskill and Lynn (2015).

theory and context. To support multicultural validity, Kirkhart (2013) suggested the following as core concepts evaluators should continually pay attention to as they evaluate: culture, history, location, power, voice, relationship, time, plasticity, and reflexivity. Validity is necessarily multifaceted and involves weighing not only different evidence, but also different kinds of evidence through different perspectives.

There is no magical threshold for determining validity. In the end, determining validity involves conversations in which we are explicit about our axiological, epistemological, ontological, and methodological beliefs and how they are operationalized within a specific context and for a specific purpose. Evolving and expanding ideas about validity is described in more depth in Chapter 5 of this *Handbook*. My contribution is situating these ideas, and others, in the context of US philanthropy, and creating the space to explore the underpinnings of how we make determinations of what is true, what matters, and for what end.

In addition to evolving notions of validity, I want to encourage evaluators, and those who purchase and consume evaluation, to expand definitions of rigor to include multiple components (see Table 9.2), as Preskill and Lynn (2015) proposed. Evaluation procedures and findings are more likely to be accurate and useful when they reflect a nuanced understanding of purposes and practices. This is true regardless of our values and intentions.

I have seen validity and rigor juxtaposed with practices that are not conventionally accepted, and/or evaluators who do not fit the “expert” mold. This introduces a false dichotomy and either/or thinking that limits. There is no way to achieve higher levels of validity and rigor (even if you are using outdated definitions of both) without understanding and including multiple perspectives and experiences. As indicated by Baggini (2016), “To pay attention to feminist, minority and marginalized perspectives is not to give up objectivity for a plurality of subjectivities, but to help achieve greater objectivity by getting a clearer, more expansive and fuller view of our reality” (Point 23 in the User’s Guide to Reason section).

Evaluators holding equity as core to their work have a special obligation to ensure that their evaluative practices don’t reinforce or exacerbate the inequities that efforts seek to address. Within EEF practice, equity is defined as both a “means” and an “end.” For the means com-

ponent, we drew on work from Change Elemental (Petty & Dean, 2017) which indicated that deep equity means working towards outcomes in ways that model dignity, justice, and love without recreating harm in our structures, strategies, and working relationships. In terms of ends, we use the definition from the World Health Organization: “Equity is the absence of avoidable or remediable differences among groups of people, whether those groups are defined socially, economically, demographically, or geographically” ([https://www.who.int/health-topics/health-equity#tab=tab\\_1](https://www.who.int/health-topics/health-equity#tab=tab_1)).

The historical context of evaluation and US philanthropy, combined with the changes in concepts of validity and rigor, created a unique opportunity to explore how we might conceive of and engage in evaluation differently. In short, I wondered how we could work together and support one another to explore questions such as those at the beginning of this chapter, to imagine and come into new ways of evaluation practice, moving towards a multiplicity of ways versus one way.

The benchmarking studies of foundation evaluation practice I read over the years suggested that current evaluation practice continued to fall short. Themes related to what was needed and lacking, such as (1) evaluations resulting in meaningful insights, (2) evaluations resulting in useful lessons for the field and for grantees, and (3) evaluation results that could be incorporated into the way foundations approached work in the future (Center for Effective Philanthropy & Center for Evaluation Innovation, 2015; Center for Evaluation Innovation, 2020) signaled that there was a desire for new and different ways. This was complemented by general commentary from critical friends of and within philanthropy and evaluation who bemoaned not only the experience of evaluation, but also what resulted from it (Behrens, 2020; Grantmakers for Effective Organizations & Council on Foundations, 2009; Stanford Social Innovation Review, 2012). The consensus was that something was not quite right.

## THE ORIGIN OF EEF

The American Evaluation Association’s Statement on Cultural Competence (2011) provided an opportunity for me and others to write an article about how philanthropic organizations could use an equitable evaluation approach to apply the principles outlined in the statement (Dean-Coffey et al., 2014). In that same article, we introduced a framework for Equitable Evaluation Capacity-Building (EECB). EECB wove together individual competencies and organizational capacities, illustrating the need to connect individual and organizational development, recognizing that development on both levels was overlapping as well as evolving. EECB underscored the importance of developing shared recognition of structural barriers and the dynamics of power and privilege, as well as the importance of thoughtful and structured facilitation of challenging conversations. It did not go deep enough. It focused on the individual and the organization, and did not consider history or context. We did not explore the beliefs and intentions that shaped Western evaluation practice, the silent underpinnings that determine what we believe. It pushed on the edges of the existing paradigm.

Around the same time, the D5 Coalition launched a five-year coalition to advance philanthropy’s diversity, equity, and inclusion (DEI). As noted on the D5 website, “As our constituencies become increasingly diverse, we need to understand and reflect their rich variety of perspectives in order to achieve greater impact” (<https://www.d5coalition.org/>). Unlike the Equitable Evaluation Initiative (EEI), D5 was squarely focused on DEI. However,

D5 is important because it signaled the US philanthropic sector's interest in DEI, and equity more generally, and it provided context for and an entrance to a bigger conversation about evaluation practice writ large. It opened the door for consideration around if and how current evaluation practice aligned with and was in service of equity. And that entry leads to a larger conversation around how we know what we know; whether that be in strategy, research, communications, finance, etc.

With a refined perspective on my work, conversations, and readings, three things became apparent in terms of how a commitment to equity was (or was not) manifesting in evaluation practice: (1) the focus was on evaluator demographics and the evaluator pipeline; (2) evaluator pipelines were developed in ways in which they lacked context, and were not in relationship to their environment nor responsive to the particular interest, desires, and characteristics of those moving through it; and (3) the very underpinnings of evaluation were limited and thus limiting us. It was time to reimagine the whole endeavor.

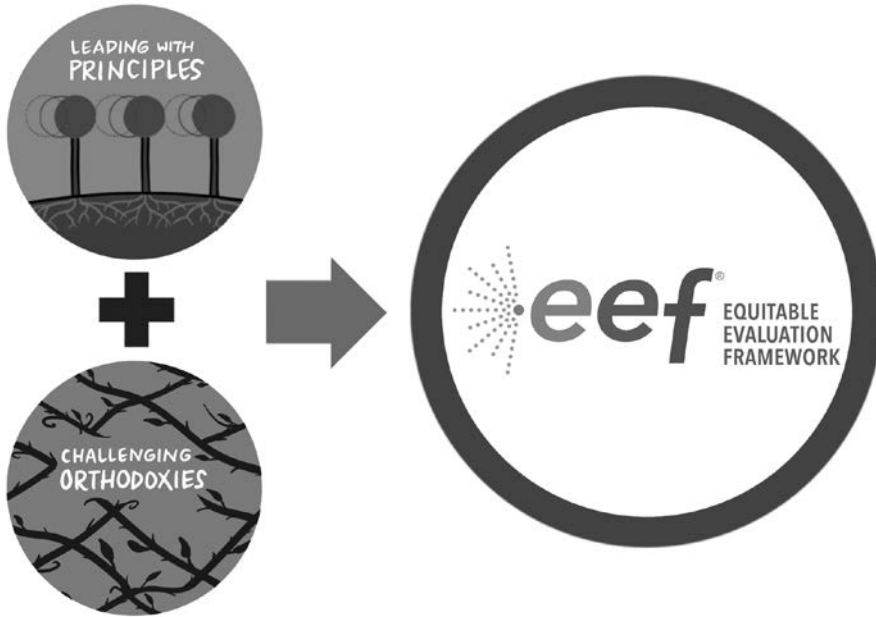
Prompted by these insights, I had conversations with colleagues and friends, including Julia Coffman at the Center for Evaluation Innovation and Dr. Teri Behrens at the Dorothy A. Johnson Center for Philanthropy. I asked if there was a “there there” and was affirmed there was. Together we designed a year-long research project<sup>1</sup> to probe deeper into evaluative practice in the US settler-created philanthropic complex among institutional foundations, which resulted in a literature review, a typology, and a set of orthodoxies and emerging principles. Throughout this research, we repeatedly heard that individuals never thought of the origins of evaluation, and if they were doing something grounded in context with purpose and values, they did not consider it evaluation. This was also true of those foundations at that time who had publicly stated commitments to equity or racial equity. They had thought about all other aspects of their functions (strategy, vendor selection, finance), but evaluation had remained this untouchable practice.

Part of the collective work leading up to the EEF included identifying evaluation “orthodoxies” and recognizing how they determine what is possible and acceptable in evaluative efforts. The Monitor Institute (2014) brought the term orthodoxies into the philanthropic sector's lexicon on evaluation through a large-scale project to redesign grantmakers' evaluation. In their 2014 report, the Institute noted that the innovation strategy firm Doblin defines orthodoxies as “deeply held beliefs about ‘how things are done’ that often go unstated and unquestioned” (p. 1). Orthodoxies are often framed as standard operating procedures and presented as best-practice or commonsense approaches to maintain high standards for evaluation (and perhaps other things as well). Unexplored, they encourage an unchallenged default and provide resistance to other options. The initial orthodoxies surfaced were those held within foundations (see Table 9.3), as they were the focus of the initial research. Since then, additional orthodoxies for other actors in the US philanthropic ecosystem (e.g. consultants, non-profits, public agencies, and philanthropic support organizations) have surfaced from practice and praxis; you can learn more about those at <https://www.equitableeval.org>.

In addition to the orthodoxies, three principles important for guiding practice emerged: (1) evaluation and evaluative work should be in service of equity; (2) evaluative work should be designed and implemented commensurate with the values underlying equity work; and (3) evaluative work can and should answer critical questions about: the ways in which historical and structural decisions have contributed to the condition to be addressed, the effect on strategy of the underlying systemic drivers of inequity, and the ways in which cultural context is tangled up in both the structural conditions and the change initiative itself. Together the princi-



ples and the orthodoxies formed the backbone of the initial Equitable Evaluation Framework, as illustrated in Figure 9.1 and described in Table 9.3. Since then, EEF has expanded to include tensions to name, mindsets to shift, and sticking points to move through; but that story lives and grows elsewhere (see <https://www.equitableeval.org>).



Source: Equitable Evaluation Initiative (<https://www.equitableeval.org/framework>), used with permission.

*Figure 9.1 The Equitable Evaluation Framework*

We shared our findings, including an initial version of the orthodoxies and principles, at a Roundtable in late 2017, and asked those present what might come next (Center for Evaluation Innovation et al., 2017). The Ford Foundation and The California Endowment were quick to offer initial investment in 2018, and the incubation of the Equitable Evaluation Initiative (EEI) began.

In 2019, EEI launched as a five-year experiment (2019–2023). There were three curiosities that influenced its design. First, I was interested in what might be possible if folks were invited to a conversation, reached shared understanding, and were collectively inspired to explore what might be next. I desired a structure with the most amount of space and flexibility so the effort could be emergent. Remember, this was a moment and time was of the essence, so the container had to be adaptive to what and who would say yes to the invitation. Second, through experience and research, I learned enough about how long it takes for something to take “hold,” and five years was the sweet spot if one was strategic and relational, and the context

**Table 9.3** *Equitable Evaluation Framework principles and orthodoxies*

| Principles: Foundational guideposts for the Equitable Evaluation Framework   | Orthodoxies: Tightly held beliefs to be questioned that can undermine Equitable Evaluation principles   |
|--|---|
| <p>(1) Evaluation and evaluative work should be in service of equity. Production, consumption, and management of evaluation and evaluative work should hold at its core a responsibility to advance progress towards equity.</p> <p>(2) Evaluative work should be designed and implemented commensurate with the values underlying equity work. Multi-culturally valid, and Oriented towards participant ownership.</p> <p>(3) Evaluative work can and should answer critical questions about the:<br/>                     Ways in which historical and structural decisions have contributed to the condition to be addressed,<br/>                     Effect of a strategy on different populations, on the underlying systemic drivers of inequity, and<br/>                     Ways in which cultural context is tangled up in both the structural conditions and the change initiative itself.</p> | <ul style="list-style-type: none"> <li>● The foundation defines what “success” looks like.</li> <li>● Grantees and strategies are the evaluand, but not the foundation.</li> <li>● The foundation is the primary user of evaluation.</li> <li>● Evaluations should provide generalizable lessons.</li> <li>● Evaluators should be selected based on credentials that reflect traditional notions of expertise.</li> <li>● Evaluators are the experts and the final arbiters; grantees are beneficiaries.</li> <li>● Credible evidence comes from quantitative data and experimental research.</li> <li>● Evaluators are objective.</li> <li>● Evaluation funding primarily goes to data collection, analysis, and reporting.</li> <li>● Timeframes/short-term outcomes as indicators of good stewardship.</li> <li>● Evaluation in service of foundation brand.</li> <li>● Trust/relationships come from doing the work but are not the starting point.</li> <li>● Accountability is one-sided set of expectations, generally set by the foundation, rooted in contractual compliance of grant partners, consultants, etc.</li> </ul> |

Source: Equitable Evaluation Initiative (<https://www.equitableeval.org/framework>), used with permission.

was favorable. If and what would come next, I wished to be co-determined, co-created, and co-held. Lastly, the philanthropic ecosystem is a marketplace. If the primary purchasers of evaluation aimed to be different in practice, I wondered (and had thoughts) about how it would affect other actors (e.g., consultants, communities, nonprofits, etc.) in the ecosystem. To learn more about the evolution of EEI visit <https://www.equitableeval.org/>.

## RUMINATIONS

As I write this chapter, it’s hard to believe EEI is entering the final year of its inaugural phase. It is unrealistic and overwhelming to attempt to create a seismic systemic shift in one go. Nor was it ever the intention. This chapter is my account of how EEF came to be, but this is work that has been and will continue to be held collectively. My role in this evolving story is that of a character in an early chapter. As it continues, there are many, many more hearts, heads, and bodies engaged in shepherding the practice of EEF. I would like to express my deep appreciation to and for Dr. Marcia Coné who joined EEI in mid-2019 as the Director of Practice Engagement and Evolution. She has been a friend, colleague, and partner in this experiment. And to Chris Cardona and Hanh Cao Yu who were at The Ford Foundation and The California

Endowment, respectively. They believed in my vision of what might be, and resourced the incubation year of EEI (2018) and beyond. Their insights and friendship made me believe this was possible. Relationships matter.

The title of this piece includes the word equity. If equity is something you care about and wish to move towards, then this invitation is one to which your RSVP should be a strong affirmative. And if you believe that equity is at odds with objectivity, validity, and rigor, then may the history of their definitions reveal their limitations and your interest be peaked. The reality is that we are operating with less insight than we might. The underpinnings of evaluation are grounded in worldviews that prevent us from more fully understanding our world. It is time for us to change that; there is too much at stake.

The entry point for engaging with the EEF is wherever you are now, as a person and in your role(s). The prerequisites for beginning are curiosity and commitment, simple in theory, and challenging and challenged in action. The notion that anyone has all the expertise required in this practice (or any practice) is a fallacy. No matter where you find yourself, there is agency and movement to be had. I truly believe it. I have borne witness to it, time and time again. And the fact that EEI exists, as does EEF, are also testament. We can reframe and expand validity, objectivity, and rigor, and embrace complexity through diligence, grounded in an understanding of ourselves as part of a larger effort. In Western society, there is a tendency to plan and to rush towards “progress.” I encourage you to pause.

We create and hold tightly to ideas and timelines often determined by others with orientations and inclinations different from our own, and decontextualized from the complexity of the world in which we all live. Reflection, reflexion, and realignment require time and patience, and cultivating relationships even more so (Coné, 2023). As Stern et al. (2019) share, there can be resistance to taking the time and allocating the resources to establish and nurture relationships, and to have the conversations necessary to examine assumptions, establish intentions, and operate from a place of deeper awareness and understanding. This includes accepting we each have power within our spheres of influence, and that every day we can make choices to shift the current paradigm. As inspiration, in a recently published open access special issue of *The Foundation Review* (volume 15, issue 3) authors share experiences of being in EEF practice, illustrating exactly that.

Operating in service of clearly articulated principles, in service of something more than knowledge or proof, asks something different from us. It asks us to consider the honor it is to decide truths, and to hold that privilege with greater care and attention as evaluation shapes lives. It is not removed from, but is part of, the stories that create our realities, and for some, dreams of what might be. For this human, it is a world where equity, justice, and liberation take us closer to freedom.

## NOTE

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