

Community-driven Foundation-wide Evaluation: A Trust-based Approach

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Outline

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2. Design and Scope of Project
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4. Recommendations for Grantmakers for Education
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Introduction & Area of Concern

- In response to current social and cultural changes calling for more **democratic** and **transparent** practices across institutions and organizations, grantmakers are looking for **community-driven approaches** to their evaluative practices.
- Foundations are seeking inclusive and meaningful **community-driven approaches** to **assess** their **goals, strategy, and impact**.

Evaluation:

- A learning tool foundations use to assess their accountability, decision-making, and/or impact

Foundation-wide evaluation:

- Holistic self-assessment of the overall values of a foundation's philanthropic activities

Area of Concern:

- Scant research on **community-driven foundation-wide evaluation approaches**

Purpose & Scope

- Grantmakers for Education seeks holistic, reciprocal, and equity-centered community-driven evaluation practices.
- Aspire to conduct community-driven evaluation across portions of its portfolio not just those dedicated to community engagement efforts.

Research Question:

How can foundations support, elevate, and incorporate community engagement in service of assessing their goals, strategy, and impact?

Scope

1. Identify parameters and considerations for **determining a community** in the context of a given scope of impact
2. Develop a **set of criteria** to support community-driven evaluation
3. Advance **practical guidance and precautions** for how to incorporate community engagement in service of foundation-wide evaluation

Design of Project

Data Collection Methods:

- Internet **search** using keyword terms related to philanthropic evaluation and community engagement
- **Identify** articles, reports, and books on foundation evaluation, community engaged methods, and similar relevant literature
- **Analyze** sources by major themes, methodology, relationship to other work, and areas of controversy in the literature

Analysis/bridging: connecting principles of community engagement with the evaluative practices of Trust-based Philanthropy

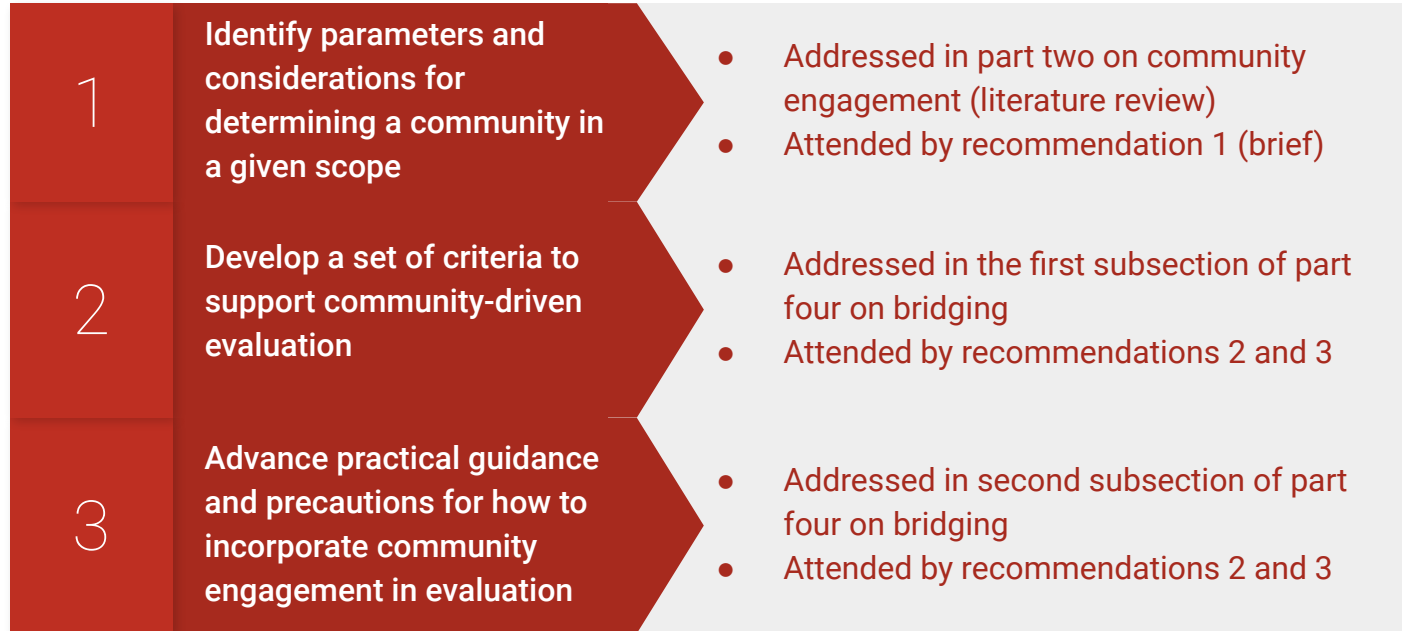
Findings:

1. There is **no one-size-fits-all approach** to community engagement since communities are dynamic and inherently variable
2. Viewing **evaluation as an ongoing learning practice** paves the way for community-driven evaluative approaches
3. Trust-based Philanthropy offers a framework for **mutual trust relationships** and **power-sharing evaluative practices**

Overall Recommendation:

Adopt a **community-driven trust-based evaluative approach**

Project Successfully Addresses Scope



Finding 1

1. There is **no one-size-fits-all approach** to community engagement since communities are dynamic and inherently variable
 - Inherent **variability** within and across communities makes them **dynamic** rather than fixed or static
 - There is **no straightforward definition** of community; given wide variation in number, strength of interconnections, and common characteristics

Three Key Aspects of Community Engagement

- **Process**
 - **Collaboration**
 - **Change**
- There is **no single model** for community engagement and taking a one-size-fits-all approach is erroneous
- Success is guided by core **values** and guiding **principles** attentive to **complexity**

Finding 1 Cont.

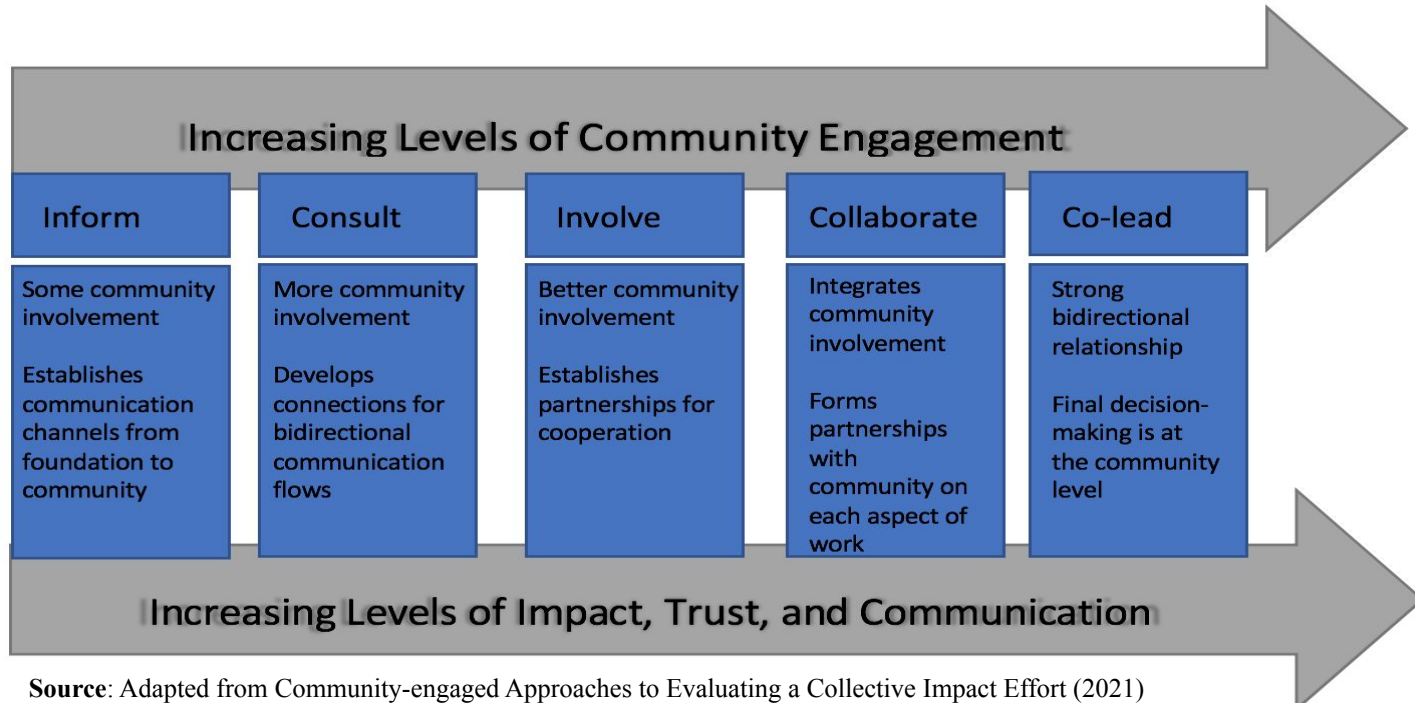
Core Values

- The **belief** that those who are affected by a decision have a right to be involved in the decision-making process
- The **promise** that the community's contribution will influence the decision or the outcome
- A **commitment** to inclusiveness by recognizing and communicating the needs and interests of all participants, including decision-makers

Guiding Principles

- **Increase** community members' knowledge about identified issue/s
- Encourage **co-creation** of additional knowledge and understanding
- **Use** that knowledge to address identified issue/cause
- Create ongoing **opportunities** for future engagement
- Ensure these opportunities and effective communication become an **ongoing component** of the process

Community Engagement as a Continuum



Source: Adapted from Community-engaged Approaches to Evaluating a Collective Impact Effort (2021)

Finding 2

2. Viewing **evaluation as an ongoing learning practice** paves the way for **community-driven evaluative approaches**

What is the connection between evaluation and learning?

Evaluation is a **core learning practice** that grantmakers and grantees use to explore their work and make improvements.

Viewing evaluation through the prism of learning allows for **learning** to become a **driver of philanthropic success**.

Engage Learning at three levels

1. **Within** grantmaking organizations: learning from experience and sharing learning with staff and board for improved results.
2. **Across** grantmaking organizations: sharing successes, failures, and challenges so colleagues do not reinvent the wheel.
3. **In partnership** with grantees: building open and honest relationships based on shared goals and a shared commitment to change.

Finding 2 Cont.

Cultivating a culture of learning: creates conditions of possibility for community-driven approaches to foundation-wide evaluation since community engagement is part of an ongoing culture of learning

Evaluation as an ongoing process: moving beyond a one-time function allows for people to work together to collect, analyze, and evaluate data to generate new learning about their work

Steps to create buy-in from those resistant to evaluation as learning:

1. **Validate:** reflect concerns back to skeptics, and acknowledge them where they are
2. **Educate:** usually the deeper issue is a lack of understanding of what evaluation is, the benefits of the results, and the staff's role in the process
3. **Collaborate:** make a conscious effort for staff to collaborate in the planning stages to help build a culture of evaluation. Employing a culture of evaluation can avoid common pitfalls down the road.

(Smith, 2020)

Finding 3

3. Trust-based Philanthropy offers a framework for **mutual trust relationships** and **power-sharing evaluative practices**

- Brings awareness of social, political, and economic power imbalances to grantmaking by interrogating and reimagining relationships
- Envisions relationships built on vulnerability, transparency, and humility

Trust-based Values:

- Work for systemic equity
- Redistribute power
- Center relationships
- Partner in a spirit of service
- Be accountable
- Embrace learning

'Flipping the script on traditional philanthropy'

Finding 3 Cont.

Cultivating Trust-based Relationships

1. Clue into **context**
2. Create conditions for **mutual learning**
3. Be willing to **share power**
4. Model **authenticity** (over performance)
5. Demonstrate **Care**
6. Encourage **Wholeness**

Challenging Evaluative Practice

Orthodoxies: evaluative beliefs unquestioned and unchallenged as **common sense** that **reinforce inequities** in foundation culture

1. Foundation decides success
2. The focus is grantees and strategies, not the foundation itself
3. Foundation is primary user of evaluation
4. Evaluations should provide generalizable lessons
5. Evaluators regarded as objective

Recommendations for Grantmakers for Education

- 1. Commit to a Trust-based Community Engagement Approach**
 - a. Determine a community**
 - b. Ensure a predisposition to community engagement**
 - c. Establish trust-based relationships with communities**
 - d. Secure funding**

Recommendations Cont.

2. Develop a Culture of Learning

- a. Engage in learning at three levels
- b. Adopt a learning practice stance toward evaluation
- c. View and value communities as knowledge producers

Recommendations Cont.

3. Embrace Trust-based Evaluative Practices

- a. Foundations believe the community has a right to be involved in all stages of the evaluation process
- b. Partner in a spirit of service leading with trust, respect, and humility
- c. Design evaluations to reflect the needs/interests of all stakeholders

Next Steps

1. **Hire** an evaluation consultant well-versed in community-driven methods (preferably on Trust-based Philanthropy as well) to help your foundation design an evaluation plan attending to the needs of the foundation and its respective community/ies.
2. **Create** opportunities for foundation leadership and staff to learn about community-driven evaluation.
3. **Build** and honor **relationships** guided by a Trust-based approach.

Comments, Feedback, Q & A

Thank You

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