# The Equitable Evaluation Framework™

May 2023 Expansion

May 22, 2023

## dear Equitable Evaluation Initiative community and beyond,

It's spring in the United States, and with the season comes change, growth, expansion.

The original offering of a set of principles and orthodoxies is known among those curious about and connected to the Equitable Evaluation Framework™ (EEF). The EEF is grounded primarily in the experience of institutional foundations within the United States from 2019—2023.

During the past four and a half years the Equitable Evaluation Initiative (EEI) engaged with 44 foundations in practice of the EEF. Alongside these foundations, consultants, philanthropic support organizations (PSOs), nonprofits, and public sector agencies contributed to the expanded version of the EEF we offer here.

Today, the EEF includes the following elements:

- **Principles**, as foundational guideposts;
- **Orthodoxies** to be questioned/challenged;
- **Mindsets**, as established set(s) of attitudes to be shifted;
- **Tensions** inherent in change processes to be named, navigated, and normalized; and
- **Sticking Points**, as opportunities to work through obstacles and perceived barriers to progress.

It looks, sounds, and feels different. It evolved. It will continue to do so.

Our heartfelt gratitude to EEI Investment Partners, EEF Practice Partners & Practitioners, Consultant and Nonprofit/Public Sector Pilot Participants, Coaches, and Knowledge Curators.

This is a collective effort rooted in relationship, trust, reciprocity, and respect among humans striving to be more human. EEI's commitment and intention remains steadfast: to seed a field and sow a practice of EEF practitioners.

We invite you to explore this latest version of the EEF and engage with those in the practice.
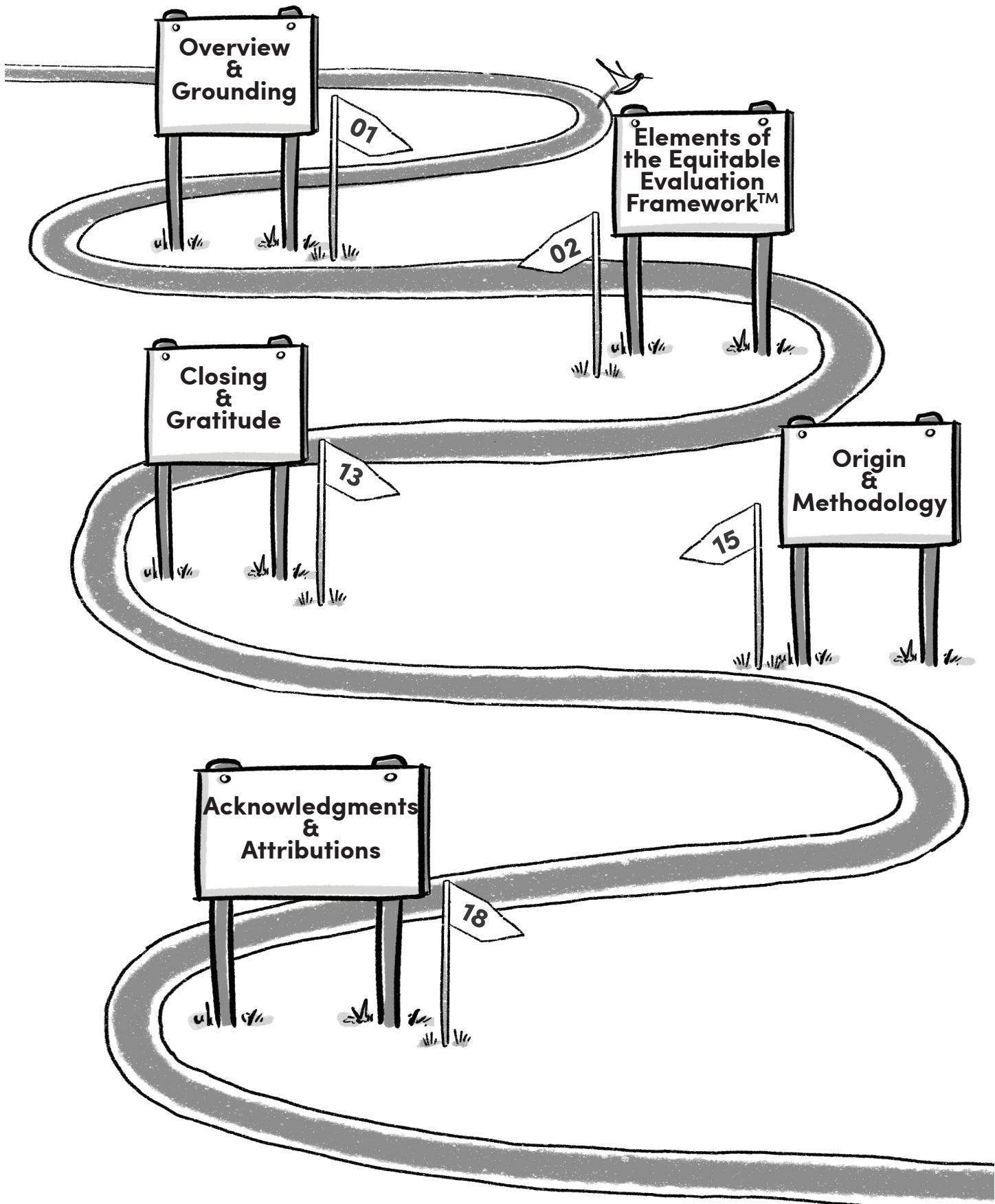
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# overview & grounding

The Equitable Evaluation Framework™ (EEF) invites alignment of purpose, practices, processes, and policies with stated values and intentions, specifically within the context of the U.S. philanthropic sector. EEF challenges us to be explicit and intentional about axiology *(what we determine to be right)*, ontology *(what we believe to be true/reality)*, and epistemology *(what is evidence/knowledge)*. It expands 21st century definitions of validity, objectivity, rigor, and embraces complexity.[1] It challenges cultural norms that continue to place preference for a singular type of truth, knowing, and evidence. The EEF changes the nature of methodologies, as well as offers a starting place for new or conventional ones.

Actors in the philanthropic sector are invited to reimagine how to approach their work.[2] The Framework offers space to ask questions and learn from and with each other in ways that inform our recommendations, actions, and decisions to align with aims and intentions.

The deepening of the EEF, steeped in practice and praxis, will continue to evolve.

> **actors** include:
> foundations,
> their nonprofit partners,
> consultants/evaluators,
> and philanthropic serving
> organizations (PSOs)

> **praxis:** how theory
> informs practice
> and how practice
> informs theory[3]

# gentle guidance

The aim and intention of the Equitable Evaluation Initiative (EEI) is to seed and grow a field of EEF Practitioners, sustained by the individuals and organizations in the practice, who bring heart and humanity into the work. Experience in the practice has provided some insight and wisdom on how to approach the EEF.
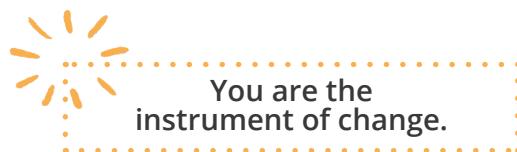
Individuals and organizations often attempt to apply the entire Framework all at once—as an "all or nothing" Mindset. Be assured, this will result in frustration and a return to default practices. Not all of these elements will be in play all the time.

We intentionally call this a practice because unlearning and learning takes time, and muscle memory evolves. As such, varying aspects of the elements may be applicable and useful at different times and moments, while others do not feel present or possible.

The invitation is to practice the EEF with intention and attention—to consider where there may be an entry point or opportunity to explore one of the EEF Principles. We invite curiosity and exploration about stated and unstated beliefs. How do these get in the way of what you are attempting to do? What if that weren't true or is not always true? What might be possible?

There may be a Mindset shift that offers or opens new ways of framing, or a Sticking Point that surfaces that feels challenging for which conversation may invite new perspectives, or a Tension that, once named, can support movement and exploration.
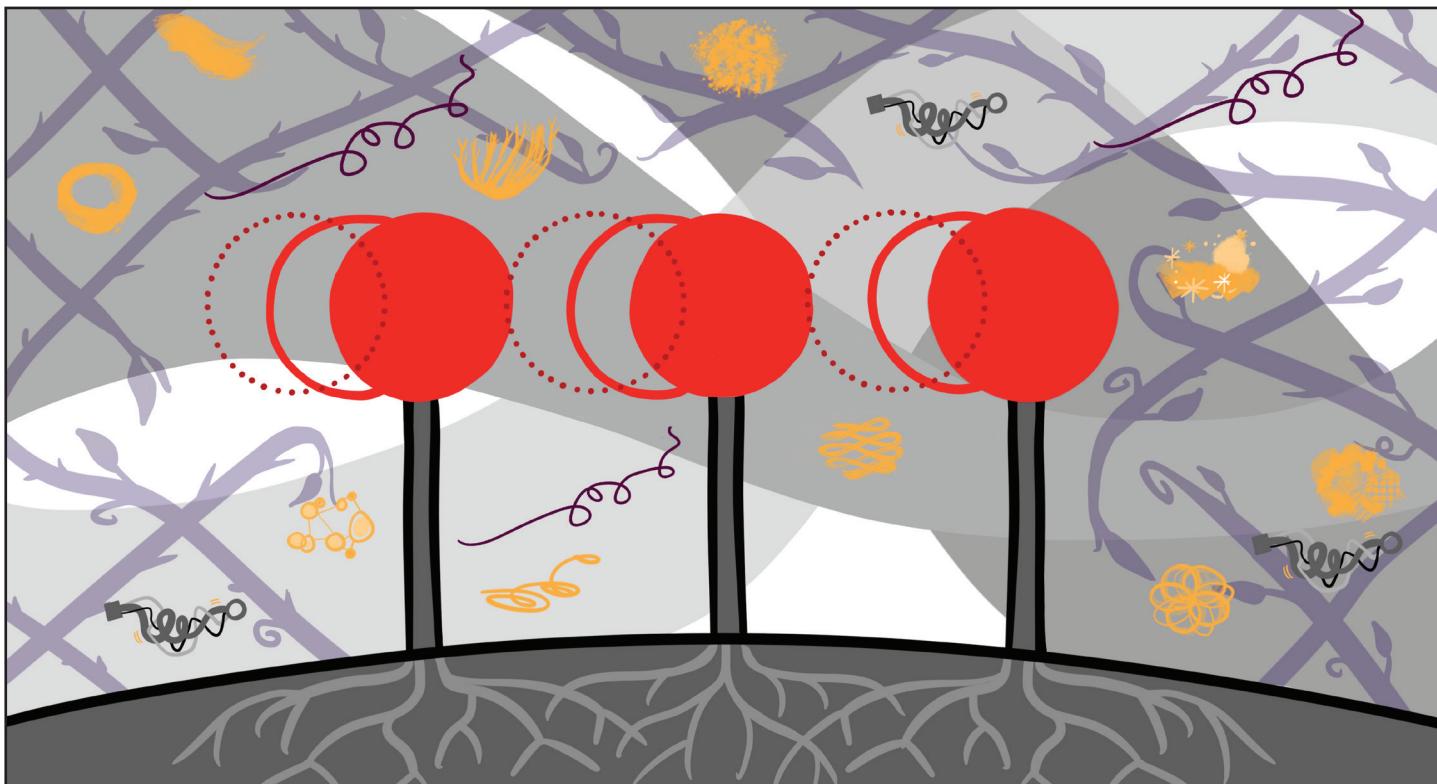
Space and grace are needed—are, in fact, necessary—in the practice of the EEF. Practice allows for change—individual and organizational. Through practice, we align our stated values with our actions. Who we are in this work and how we show up in it are the difference that will make a difference.

> **You are the
> instrument of change.**

# the elements of the Framework

*The EEF is a set of Principles, Orthodoxies, Mindsets, Tensions, and Sticking Points*



**EEF Principles** are foundational guideposts to advance equity and challenge singular type of truth, knowing, and evidence.

The **Orthodoxies** are deeply held beliefs that get in the way of advancing the Principles.
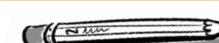
The **Mindsets**, **Tensions**, and **Sticking Points** provide support in traversing the Orthodoxies.

Generally, the **Orthodoxies**, and their related and highly nuanced attitudes, behaviors, beliefs, policies, and processes, surface themselves in response to new ideas related to advancing the **Principles** in practice. These moments surface, and often stall, the change process. The **Mindsets**, **Tensions**, and **Sticking Points** provide entry points for conversation and connection and opportunities for reflection, reflexion, and realignment.

**equity** as *means*:
working toward outcomes in ways that model dignity, justice, and love without re-creating harm in our structures, strategies, and working relationships.[4]

**equity** as *ends*:
The absence of avoidable or remediable differences among groups of people, whether those groups are defined socially, economically, demographically, or geographically.[5]
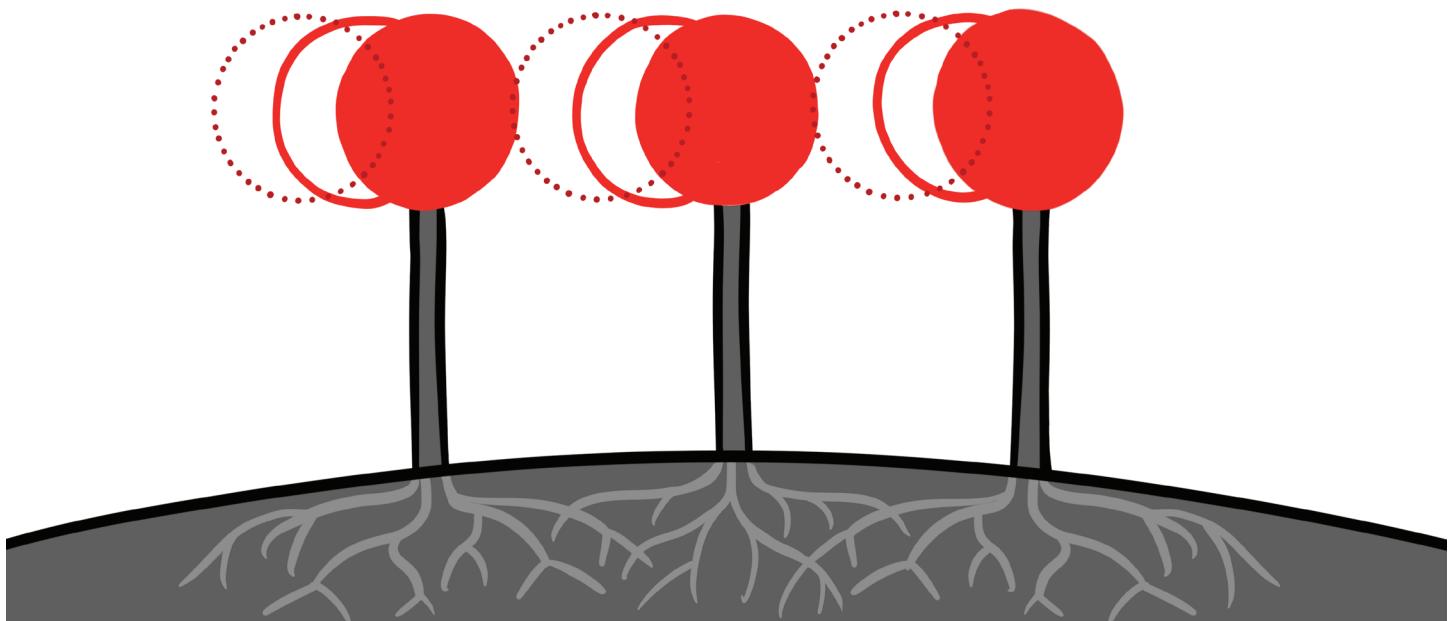
**reflexion:**
examining oneself, heightening critical awareness of self in action, knowledge as social construction, and curiosity of what is "known and unknown."[6]

# principles

*Foundational guideposts of the Equitable Evaluation Framework™ (EEF)*

The EEF includes a commitment to three Principles. These foundational guideposts support reconceptualization of evaluative work, evaluative thinking,[7] and decision-making. As such, the EEF Principles offer examination of the why and how and what of evaluation.

### Principle One
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.

### Principle Two
Evaluative work should be designed and implemented commensurate with the values underlying equity work:

- Multi-culturally valid, and
- Oriented toward participant ownership.
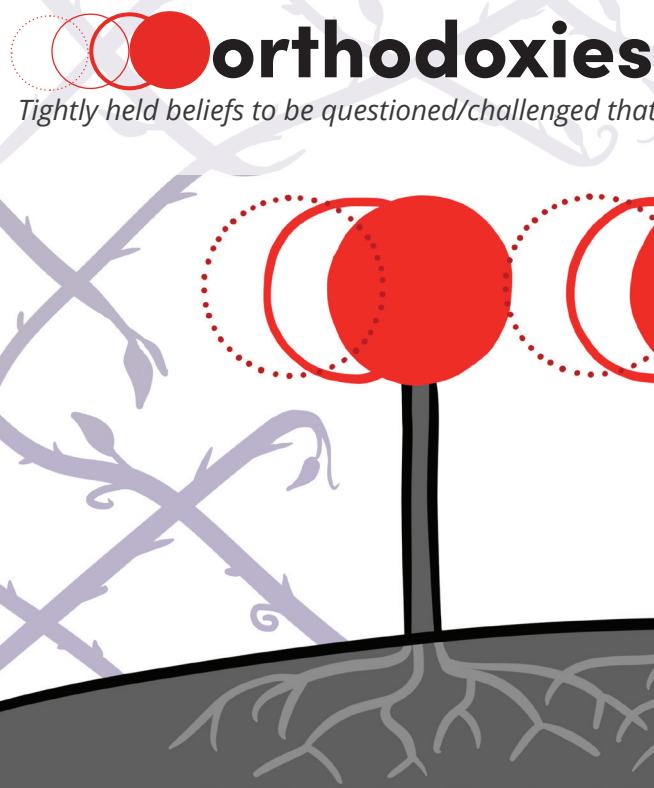
### Principle Three
Evaluative work can and should answer critical questions about the:
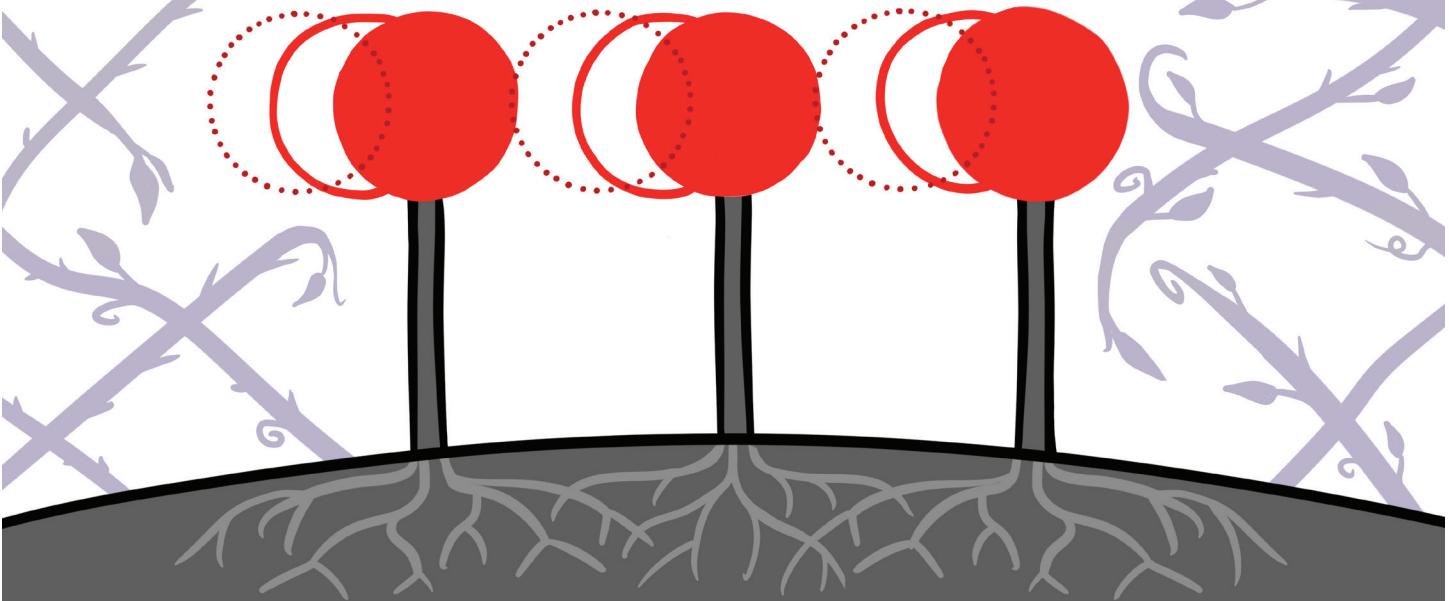
- Ways in which historical and structural decisions have contributed to the condition to be addressed,
- Effect of a strategy on different populations, on the underlying systemic drivers of inequity, and
- Ways in which cultural context is tangled up in both the structural conditions and the change initiative itself.

The EEF Principles have application to all actors in the philanthropic ecosystem and are relevant no matter foundation typology, organizational assets, size, or structure. Over time, as these Principles are internalized into habits, they become (or align with) values and foster the creation of a wide variety of practices for varying contexts.

# orthodoxies

*Tightly held beliefs to be questioned/challenged that can undermine EEF Principles*

Over time, the philanthropic sector developed a set of "orthodoxies," or tightly held beliefs, about evaluative practice.[8] Orthodoxies are often invisible and unspoken, masquerading as "common sense." They are believed to be foundational and affect the undercurrents of organizational culture. They are shaped by the actors in the philanthropic ecosystem.

Many of the Orthodoxies act like a drag on any evaluation effort and, even more so, on those efforts related to equity. In some cases, they reinforce inequities. They reflect a mix of capitalism and white dominant framing. As evidenced in practice and praxis, these get in the way of advancing the EEF Principles.

In reflecting on these Orthodoxies, six areas surfaced:

| objectivity, rigor, evidence | resources: money, time, people | expectations, roles |
|---|---|---|
| definitions, decisions, perceptions | relationships, trust | productivity, accountability |

These areas are expressed and experienced differently based on the actor in the philanthropic ecosystem.



FOUNDATIONS      CONSULTANTS      NONPROFITS      PUBLIC/GOVT. AGENCIES      PSOs

| objectivity, rigor, evidence | |
|---|---|
| **FOUNDATIONS** | Evaluators are objective. |
| | Credible evidence comes from quantitative data and experimental research. |
| | Grantees and strategies are the focus of the evaluation, but not the foundation. |
| **CONSULTANTS** | Objectivity is necessary for consultant credibility. |
| | There are specific methods and tools for evaluation that center equity. |
| **NONPROFITS / PUBLIC/GOVT. AGENCIES** | Stories are the best evidence of our impact. Numbers strip away the complexity and humanity of what we do. |
| | Programs are the focus of evaluation, not the organization. |
| **PSOs** | Credible evidence comes from program attendance. |

| resources: money, time, people | |
|---|---|
| **FOUNDATIONS** | Evaluation funding primarily goes to data collection, analysis, and reporting. |
| **CONSULTANTS** | Evaluation resources primarily support data collection, analysis, and reporting. |
| | Centering equity requires resources (time, money, humanity, etc.) often not tended to sufficiently in evaluation. |
| **NONPROFITS / PUBLIC/GOVT. AGENCIES** | Resources go into evaluation, but not much comes out of it. |
| | Evaluating the real impact of our work is beyond our capacity and no one wants to fund it. |
| | Evaluation requires money, expertise, and time we don't have. |
| **PSOs** | We are competing for funding with community-based organizations (scarcity mindset). |

| expectations, roles | |
|---|---|
| **FOUNDATIONS** | Evaluators are the experts and final arbiters, grantees are beneficiaries. |
| | Evaluators should be selected based on credentials that reflect conventional notions of expertise. |
| | Evaluations should provide generalizable lessons. |
| **CONSULTANTS** | Consultants must specialize in certain areas or approaches to remain competitive. |
| | The foundation holds all of the power and decision-making authority. |
| | The responsibility to support consulting practices that center equity rests on consultants alone. |
| **NONPROFITS / PUBLIC/GOVT. AGENCIES** | Evaluation is something we have to do to obtain or maintain funding. |
| | What people are willing to pay for and show up for is what matters most. |
| **PSOs** | We are both gatekeepers and grantees and need to keep both in mind. |
| | We are so far removed from impact that we can't attribute change to our work. |

eef EQUITABLE EVALUATION FRAMEWORK          eei EQUITABLE EVALUATION INITIATIVE

| definitions, decisions, perceptions | |
|---|---|
| **FOUNDATIONS** | The foundation is defines what "success" looks like. |
| | Evaluation in service of foundation brand. |
| | The foundation is the primary user of evaluation. |
| **CONSULTANTS** | Consultants accept/perpetuate definitions and norms that pit rigor against equity rather than understanding how they are intertwined. |
| | Consultants are often motivated by the desire to help/save communities. |
| | Consultants conceal personal and/or business values to be successful. |
| **NONPROFITS** / **PUBLIC/GOVT. AGENCIES** | Evaluation is a gamble, and we could lose. |
| | Evaluation is expensive, time consuming, and takes away from our mission work. |
| **PSOs** | We could influence what success looks like, but could also perpetuate foundation truth. |
| | Conferences and publications change the field. |
| **relationships, trust** | |
| **FOUNDATIONS** | Trust/relationships come from doing the work, but are not the starting point. |
| **CONSULTANTS** | Relationships are secondary to the technical responsibilities that consultants hold. |
| **PSOs** | We shouldn't work together. |
| **productivity, accountability** | |
| **FOUNDATIONS** | Timeframes/short-term outcomes serve as indicators of good stewardship. |
| **CONSULTANTS** | The ways in which business models are often exercised in capitalism are at odds with knowledge sharing, co-creation, and collaboration. |
| **PSOs** | Funder satisfaction matters. |
| **FOUNDATIONS** **NONPROFITS** **PUBLIC/GOVT. AGENCIES** **PSOs** **CONSULTANTS** | Accountability is a one-sided set of expectations rooted in compliance, generally expressed as foundation sets expectations and contractual obligations of grant partners, consultants, etc. |
| | The fast-paced production of deliverables demonstrates "impact" and "outcome." |
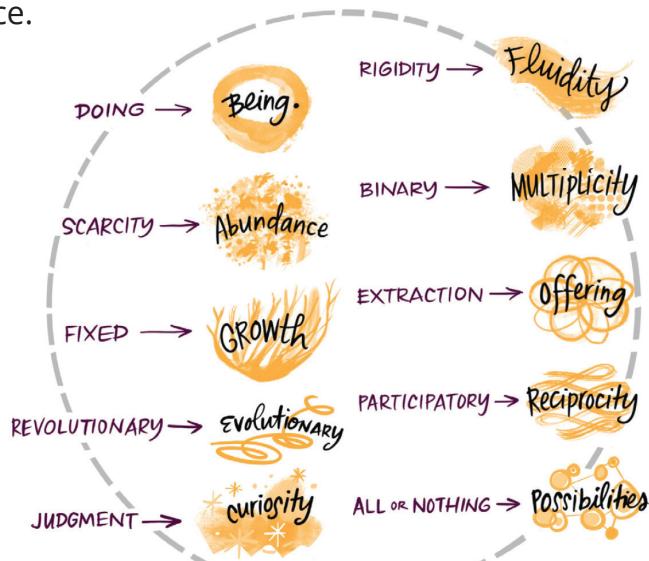
# mindsets

*An established set of mental attitudes to be shifted toward*



A Mindset is an established set of mental attitudes held by someone. They play a significant role in how one interprets and responds to situations—whether consciously or unconsciously. Thoughtfully assessing and shifting mindsets allows one to fundamentally (and intentionally) change how they interpret and respond to situations. Examining and shifting mindsets offers an entry point for creativity, innovation, and opens up new pathways toward desired change.
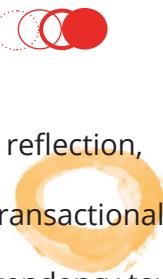
An important note is the inclusion of the directionality moving *from* an existing mindset *toward* a new mindset. The aim here is to surface ongoing movement, potential, and expansion through continual practice.



DOING → Being.

SCARCITY → Abundance

FIXED → GROWTH

REVOLUTIONARY → Evolutionary

JUDGMENT → curiosity

RIGIDITY → Fluidity

BINARY → MULTIPLICITY

EXTRACTION → Offering

PARTICIPATORY → Reciprocity

ALL OR NOTHING → Possibilities

# mindsets (continued)

### from **Doing** toward **Being**

- How might you pause, invite reflection, question urgency?
- How might you move from transactional toward relational?
- What are the ways in which tendency towards action/reacting impedes responding?

### from **Scarcity** toward **Abundance**

- What might be possible?
- How might you seek entry points and realign resources?
- What/where are the assets, joy, and potential?
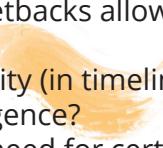
### from **Fixed** toward **Growth**[9]

- What do you need to unlearn? Learn?
- What might you try, play with, pilot?
- How might you allow for complexity to unfold and emerge?
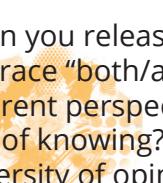
### from **Rigidity** toward **Fluidity**

- How might unsettling and setbacks allow space to create new ideas?
- How might you invite flexibility (in timelines, strategy, etc.) to allow emergence?
- How might you release the need for certainty and invite creativity and innovation?

### from **Binary** toward **Multiplicity**

- What might be possible when you release "either/or" thinking and embrace "both/and"?
- How might you explore different perspectives and options to expand ways of knowing?
- How might you allow for diversity of opinion, contexts, social locations, backgrounds, etc. to inform your thinking?

### from **Extraction** toward **Offering**

- How might you transform ways of engaging that extract intellectual property/ownership toward reciprocal processes?
- How might you disentangle our expectations that partners owe (data, participation, etc.) as uncompensated?
- How might you move into relationship with partners, and create opportunities and access?
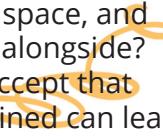
### from **Participatory** toward **Reciprocity**

- How might you step into conversation that acknowledges interdependence?
- How might you co-create accountability and allow for mutual benefit?
- How might relationship, trust, and shared understanding be fostered?
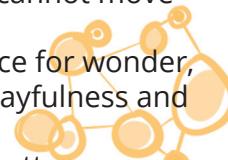
### from **Revolutionary** toward **Evolutionary**[10]

- How might you allow movement and progression in alignment over time?
- What if you allow ample time, space, and support needed to bring folks alongside?
- What if you understand and accept that small changes over time sustained can lead to sustainable change?

### from **"All or Nothing"** toward **Possibilities**

- How might you disrupt beliefs that unless everyone is on board we cannot move forward?
- How might you open space for wonder, creativity, vulnerability, playfulness and courage?
- What if you let go of old patterns, processes, policies and allow new ways of being, thinking, and doing?

### from **Judgment** toward **Curiosity**

- What if you let go of preconceived notions, expectations, and assumptions?
- What might be possible when you invite conversation, connection, and shared sense-making?
- How might you shift dynamics of power and "solving" toward puzzling together?

Tensions are inherent in change processes, but they need not become breaking points. Tensions can cause emotional, cognitive, or relational strain, requiring deft attention and navigation. As individuals expand their being, thinking, and doing, opposition between existing practices and processes and emerging possibilities can create resistance, frustration, and confusion.

Rather than getting stuck in either/or, embracing a both/and approach recognizes complexity. Tensions provide a way to notice and surface the interrelationship of varying levels and issues in the practice of the EEF at differing perspectives. Tensions provide opportunities to name and address the dissonance (opposing ideas/approaches driven by different values and fears) and shift toward consonance (flow between one another). The aim and intention is not to "solve" tensions; rather it is to recognize, name, normalize, and navigate them.

# tensions (continued)

### social positions & roles
Deference to hierarchy and social status

### influence, organize, mobilize
One's sphere of influence to step in or bring others along

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### a thing
A project, program, study, etc. done in isolation or a vacuum

### a body of work
An expansive view that offers through lines and ah-ha's connecting intentions and concepts

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### individuals
Individual competencies, needs, desires, and values

### organizations
Organizational capacities, culture, and mission

### systems
Structural conditions and underlying systemic drivers at play

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### technical approaches
A focus or priority on detailed tactical tools and approaches

### conditions for change
The support and nurture of relationship, trust, and related factors that invite possibility

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### use & adaptation
Application and modification of information and insights from people and sources for one's own credit

### acknowledgment & attribution
Recognition of the work that supports or informs your work with citation

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### urgent & reactive
Pressures of deadlines, dockets, deliverables and decisions that revert to default practices
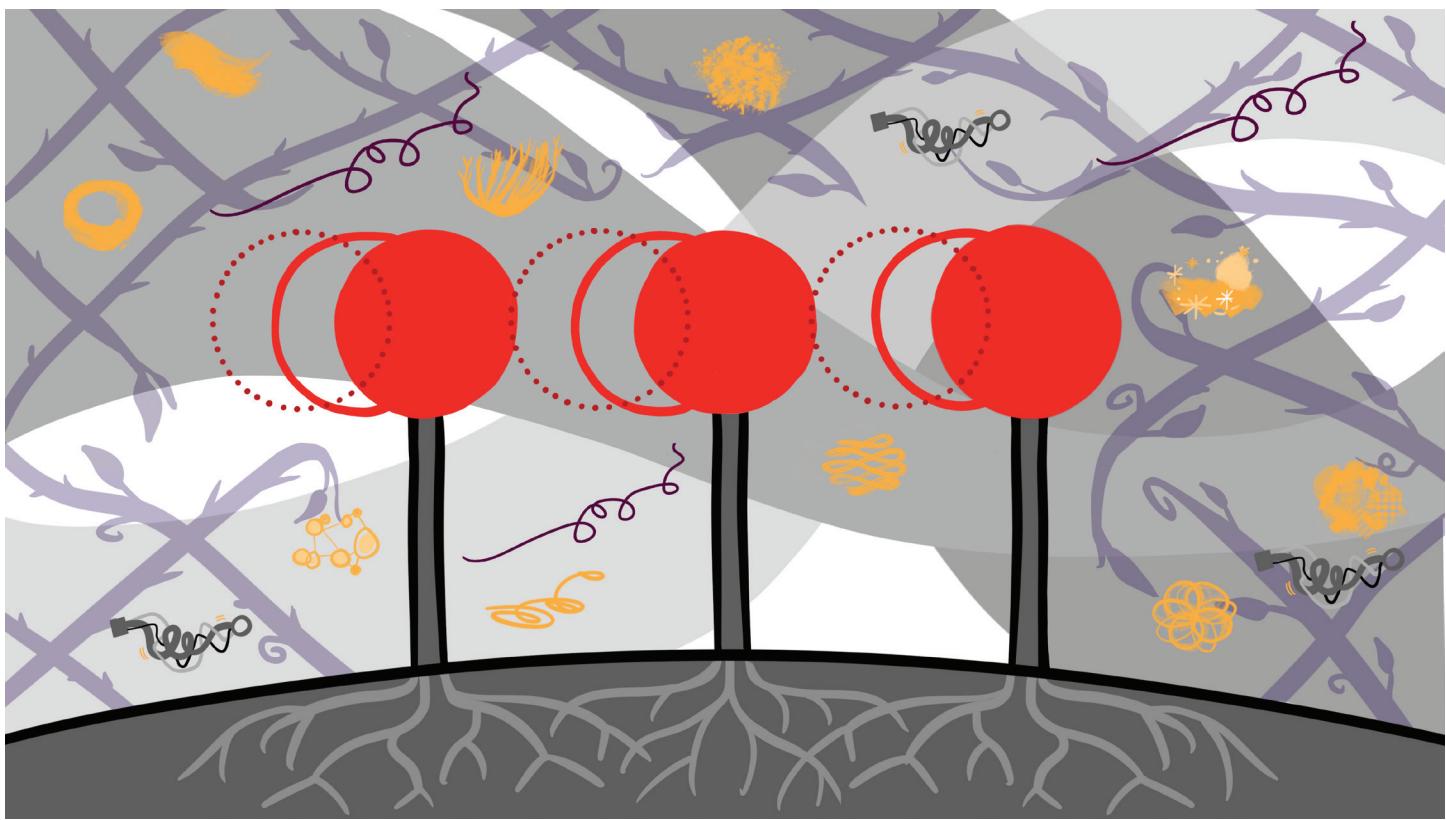
### aligned & responsive
Time to pause and think about how the work might strategically integrate and advance aims and intentions

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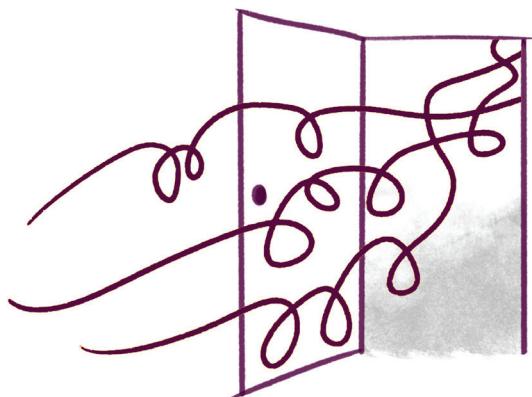
# sticking points

*Obstacles or barriers to be moved through, over, under, or around*



Sticking Points are opportunities to remove obstacles and/or perceived barriers to progress. Often, these arise when there is pushback, a hiccup, or slowing down, which may be interpreted as a lack of commitment, resistance to change, or a shift to other priorities. This point of inflection can serve as a moment to pause and explore. The Sticking Points offer ways to move through, over, under, or around iterative and generative conversation.

# sticking points (continued)

## Inviting Vulnerability and Risk
This considers how you show up and are open to possible implications and comfort with change.

- What happens when how you're seen or perceived changes (e.g., as an expert knowing all the answers and that is no longer the case)?
- What might that change your sense of identity and competence?
- How comfortable are you in trying something new? Not being perfect?
- How might you demonstrate more humility and transparency?

## Willing to Stay in Conversation
Dialogue requires a relationship with trust, proximity, history, and context as key factors.

- What is the nature of your evaluative work? Do you have a relationship where you can be different, say things, and try things you have not before?
- What is your understanding of the role of race and racism (and all the "isms") in evaluative practice?
- How do you fare with openness?
- What is your comfort with discomfort? How might you navigate?

## Defining Equity (as means and ends)
Clarity and a shared understanding with others on what you mean and how equity is defined.

- How are you defining equity and getting on the same page with others? Does this consider equity as both a means (processes) and ends?
- How might you invite and engage in conversations about disparities and institutional and structural barriers?
- How might you shift from single axis to intersectional? How might you talk about race, gender, ability, sexual orientation—all the identities—and how they shape how you are in the world and how that, in turn, shapes how you see the world?
- How might this be the same or different from talking about justice, liberation, equality, or anti-racism?

## Reframing Current Asymmetrical Evaluation Discourse
This moves toward being more balanced and nuanced and recognizes power and related dynamics at play.

- What are the ways you can talk about evaluative work so that it is in closer relationship to how program and strategy unfolds? How does it respond?
- How might you explore and address power and how it manifests in the processes, protocols, and practices of evaluation?
- How might a relational approach allow for long term mutual benefit and reciprocity?
- How might a shift in who is acknowledged and invited as having expertise, including voices of those closest/most affected, enhance validity and rigor and embrace complexity across all phases of evaluative work?

## Staying in Practice Over Time
Resists defaults and recognizes shifts (including small ones) as indications of progress and possibility.

- How might you acknowledge desire for or choice of default practices (that are reactive/misaligned with your values) that are no longer the ways in which you work?
- How might you continue to be purposeful in your practices over time in ways that support bringing others alongside?
- What might shift as you embrace and engage in practices that impart equity as both means and ends? How might you explore and align your processes along the way?
- When do you recognize and acknowledge small changes and shifts as progress (to build on and help stay in practice)? How might you invite possibility?
- How might you dedicate time between your internal reaction and your external response/action? What practices are required/necessary as a staff/organization? What practices do you want to be in with your partners/community? How do you hope your partners/community experience you?

# closing & gratitude

It is an honor to witness and walk alongside these individuals and organizations, who co-created this expansion while in the practice. This is a collective offering of many hearts and minds. We are grateful for the willingness to explore new ways of being, thinking, and doing in the practice of the EEF. We acknowledge and attribute the expansion of the EEF to our Practitioners, Practice Partners, Pilot Participants, EEI Knowledge Curators, and EEF Coaches. Our gratitude and appreciation.

We ask you to credit EEI and cite the EEF and the work that flows from EEF Practice Partner and Practitioner offerings (such as conferences, blogs, publications), to make it easier to join and trace the conversation about this work.[11]

**equitableeval.org/acknowledgment**

## EEF practice partners & practitioners

**EEF Practice Partners** are individuals and institutions exploring the EEF through a two-year practice experience. **EEF Practitioners** completed the two-year experience and continue to engage in practice alongside other individuals and organizations.

| | |
|---|---|
| Akonadi Foundation | Michigan Fitness Foundation |
| Barr Foundation | Minneapolis Foundation |
| Bill & Melinda Gates Foundation | Missouri Foundation for Health |
| Chan Zuckerberg Initiative | Northwest Area Foundation |
| Community Foundation of Snohomish County | Oregon Community Foundation |
| Conrad N. Hilton Foundation | Rhode Island Foundation |
| Democracy Fund | Robert Wood Johnson Foundation |
| Ewing Marion Kauffman Foundation | Seattle Foundation |
| Fairfield County's Community Foundation | Silicon Valley Community Foundation |
| GHR Foundation | Sisters of Charity Foundation of Cleveland |
| Greater Milwaukee Foundation | Skoll Foundation |
| Hartford Foundation for Public Giving | Stupski Foundation |
| Health Forward Foundation | The Annie E. Casey Foundation |
| Health Foundation for Western & Central New York | The California Endowment |
| HealthSpark Foundation | The Colorado Health Foundation |
| Heising-Simons Foundation | The Colorado Trust |
| Kansas Health Foundation | The Community Foundation of Greater New Haven |
| King County | The Greater Clark Foundation |
| Los Altos Mountain View Community Foundation | The James Irvine Foundation |
| Lumina Foundation | The Kresge Foundation |
| Margaret A. Cargill Philanthropies | Tipping Point Community |
| McKnight Foundation | William & Flora Hewlett Foundation |

**equitableeval.org/our-community#eef-partners**

## consultant/nonprofit/public sector pilot participants

C. Camman Evaluation
Emergence Collective
Equal Measure
Frey Evaluation, LLC
Funders Together to End Homelessness
Hopelab
JLI Consulting
NineFold

Omidyar Network
PEAK Grantmaking
Project Evident
Proponents LLC
Southern California Grantmakers
Spectrum Health Lakeland (a division of Spectrum Health)
STEAM Workgroup
Terraluna Collaborative

## EEI investment partners

**Investment Partners** contribute financial resources to advance field-wide practice of the Equitable Evaluation Framework™.

Barr Foundation
Bill & Melinda Gates Foundation
California Health Care Foundation
Chan Zuckerberg Initiative
Conrad N. Hilton Foundation
Ewing Marion Kauffman Foundation
Ford Foundation
Fund for Shared Insight
Lumina Foundation
MacArthur Foundation
McKnight Foundation

National Philanthropic Trust
Robert Wood Johnson Foundation
S.D. Bechtel, Jr. Foundation
San Francisco Foundation
Seattle Foundation
The California Endowment
The David & Lucile Packard Foundation
The James Irvine Foundation
The Omidyar Group
Walton Family Foundation
William & Flora Hewlett Foundation

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Cristina Whyte
Eve Weiss
Jessica Xiomara Garcia
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Nitya Venkateswaran
Pilar Mendoza
Veena Pankaj

Funders Together to End Homelessness
Grantmakers for Effective Organizations
Peak Grantmaking
Southern California Grantmakers

## EEI knowledge curators

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## EEF coaches

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Rachel Mosher-Williams, MPA
Yen Chau, PhD

# origin & methodology

EEI and the practice of the EEF acknowledge the historical and post-positivist evaluation norms that tend to preference and privilege a singular—and often simplified—type of truth, knowing, and evidence. The EEF shows the possibility of prioritizing high-quality design and methods of evaluation that are both valuable to the end user and in service of strategy. In doing so, ways of knowing, data gathering, and sense-making are expanded and new definitions of validity, rigor, and objectivity that acknowledge multiplicities, different truths, and complexities are embraced.

EEI's multimodal methods approach is rooted in the adoption and application of these 21st century definitions, which supports our practice of the EEF and the advancement of the EEF Principles. The ideas and frames that inform the Equitable Evaluation Framework™ (EEF) predate the Equitable Evaluation Initiative (EEI). Exploration, experimentation, and evolution along the way includes a mix of approaches and avenues, notably fifteen 4-6 month Making the Case Collaboratories (228 organizations, 537 participants), six Classes (2-year experience arc) of Foundation EEF Practice Partners/Practitioners (44 foundations, 180 participants), a Consultant pilot (9 entities, 12 participants) and a Nonprofit/Public Sector pilot (8 organizations, 40 participants).

## early grounding
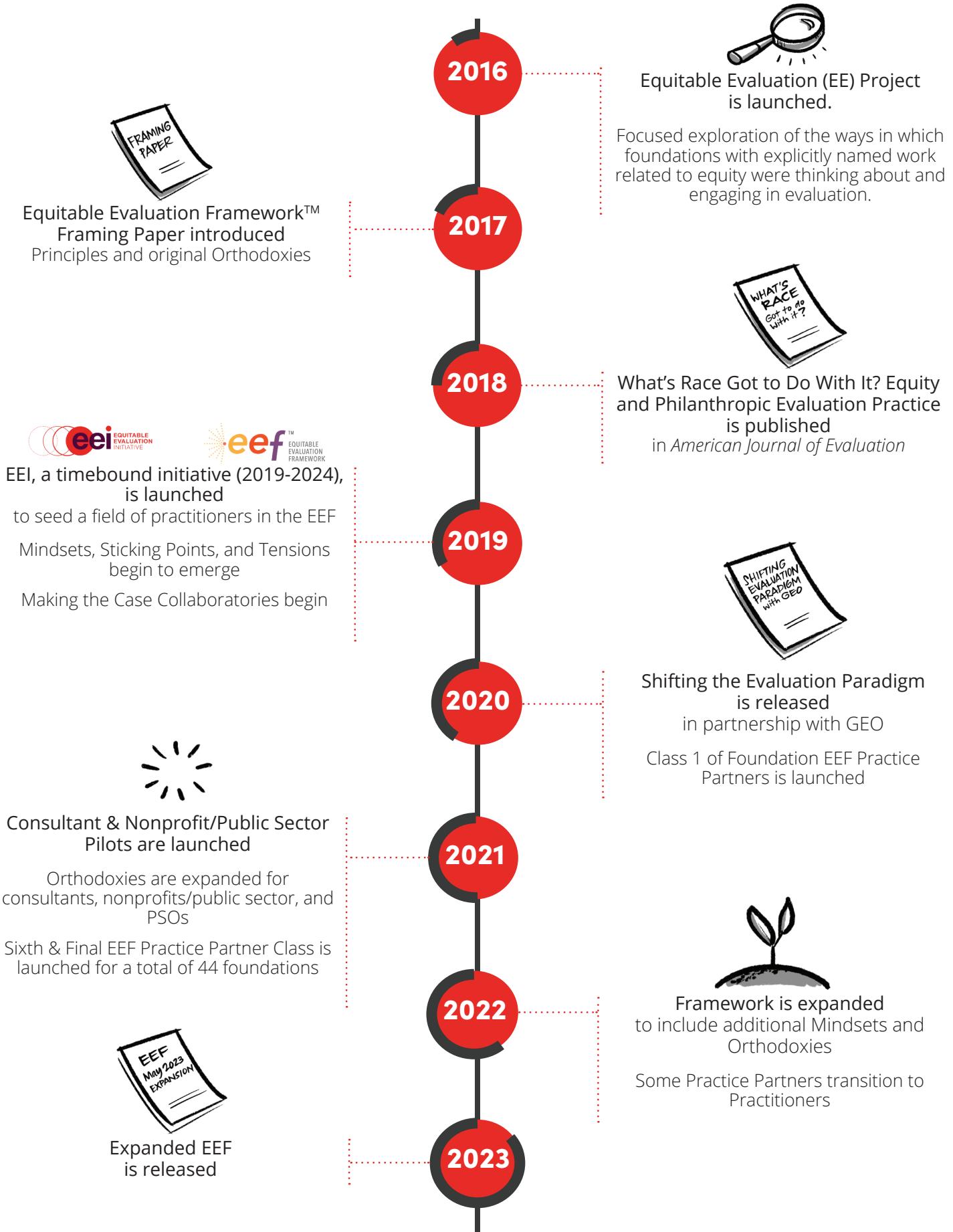
The first expression of the EEF emerged through the article What's Race Got to Do With It? Equity and Philanthropic Practice, evolving from the Equitable Evaluation project and the EEF Framing Paper. In 2018, in conversation with very early Practice Partners (individuals representing foundations), the EEF first expanded and was shared through Shifting the Evaluation Paradigm: The Equitable Evaluation Framework, published in partnership with Grantmakers For Effective Organizations in 2019. Raising the Bar—Integrating Cultural Competency and Equity: Equitable Evaluation (Dean-Coffey, Casey, & Caldwell, 2014) introduced the term "equitable evaluation" to U.S. philanthropy.

## emergent relational evaluation, research, & learning design

EEI is in development[12] of an emerging relational evaluation, research, and learning design which shifts away from the conventional and transactional nature of evaluation and research relationships, methods, and approaches toward relationship, trust, reciprocity, and respect, while noticing and learning alongside. Real-time learning supports ongoing practice of the EEF. Relational evaluation, research, and learning design allows space and time for meaning-making and learning to emerge organically. It aligns or realigns methods or approaches that support deeper engagement and connection to noticings and surfacings as the EEF unfolds.

EEI methods incorporate elements of embodied inquiry, which encourages a myriad of approaches and lenses to generate data and process embodied lived experiences and expertise. Embodied Inquiry[13] is guided by three foundational principles: the first sets out the what; the second answers why; and the third expresses the how. Together, they support the way in which the methods are thought about and carried out. The practice of the EEF acknowledges that who we are in this work matters (being), which informs and shifts how we think about, construct, and engage with evaluative practice (thinking), which allows for the alignment in the practice (doing). EEI employs a process of reflection, reflexion, and realignments.

# timeline of the EEF

**2016**

Equitable Evaluation (EE) Project is launched.

Focused exploration of the ways in which foundations with explicitly named work related to equity were thinking about and engaging in evaluation.

**2017**

Equitable Evaluation Framework™ Framing Paper introduced
Principles and original Orthodoxies

**2018**

What's Race Got to Do With It? Equity and Philanthropic Evaluation Practice is published
in *American Journal of Evaluation*

**2019**

EEI, a timebound initiative (2019-2024), is launched
to seed a field of practitioners in the EEF

Mindsets, Sticking Points, and Tensions begin to emerge

Making the Case Collaboratories begin

**2020**

Shifting the Evaluation Paradigm is released
in partnership with GEO

Class 1 of Foundation EEF Practice Partners is launched

**2021**

Consultant & Nonprofit/Public Sector Pilots are launched

Orthodoxies are expanded for consultants, nonprofits/public sector, and PSOs

Sixth & Final EEF Practice Partner Class is launched for a total of 44 foundations

**2022**

Framework is expanded
to include additional Mindsets and Orthodoxies

Some Practice Partners transition to Practitioners

**2023**

Expanded EEF is released

# the EEF practice: conversation, practice, community

The EEF Practice Partner experience has three organizing and emerging pillars: conversation, practice, community. These support and serve as through-lines across the EEF Practice Partner/ Practitioner spaces and places held by EEI. The methods and modalities intentionally weave and thread within, between, and among these. This includes embodied inquiry, which continually encourages, models, and asks, "What does this look like, sound like, feel like, then do?" The emergent relational design allows for flexibility and recalibration and accommodates organic growth. It supports a living expression of the EEF that evolves alongside those in the practice.

## conversation

Speaking directly and authentically and listening deeply have the capacity to transform and bring about change.

EEI conversations create a unique environment designed to guide how we show up, think about, and practice evaluation through collective inquiry on advancing the EEF.

## practice

The focus in the practice of the EEF is on process, individuals, organizations, and systems— not only the product.

What we pay attention to and what we practice is what we value. Practice makes us vulnerable and pushes us to the edge of our current skill set and beyond.

## community

Our Equipping for Transformation (EFT) community in practice is made up of individuals, who are active practitioners of the EEF and share what they are learning with and alongside others.

When we are in community and relationship with each other, we learn how to be and do better.

# data generation & meaning

A variety of modalities—such as podcasts, blogs, poetry, video, and more—are offered to inform conversation and support different ways of knowing and expression. From these diverse and unique conversations, reflections, noticings, and surfacings reveal ideas and relationships among and between concepts and the identified EEF elements: Orthodoxies, Mindsets, Tensions, and Sticking Points.

# expanded ways of knowing

EEI invites exploration of other ways of knowing: sense perception, intuition, emotion, memory, reason, imagination, and faith.[14] The EEF acknowledges and expands multiple and interdependent ways of knowing. Since 2020, EEI has had a Resident Artist (and engages with additional artists) to craft graphic recordings, animated video, and other visual iconography to support EEI communications and the practice of EEF. Art is an ancient and honored way of knowing.

Bloom's Taxonomy[15] invites exploration of learning from multiple levels: remembering, understanding, applying, analyzing, evaluating, and creating. Conventional ways of knowing exclude tradition, superstition, storytelling, and emotion, which offer important dimensions of the learning process.[16] EEI's intention, use, and modeling of different forms of experiences, expressions, and examples of ways in which we are noticing and surfacing the practice of the EEF is guided by these theoretical underpinnings. It is further informed and influenced by Paulo Freire's[17] seminal work on adult learning which invites adults to act and assert themselves as agents of change. This has relevance to creating a new paradigm around knowledge—which evaluation is a part of or entry to— and about the "to what end"—be it equity, liberation, justice, and/or freedom.

# acknowledgments & attribution

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# about EEI



EEI COMMUNITY
FIELD BUILDING (GROWING) ELEMENTS

SEEDING PRACTICE of the EQUITABLE EVALUATION FRAMEWORK™

RESOURCES

IDENTITY

INFRASTRUCTURE for COLLABORATION

PRAXIS

CONTINUOUS LEARNING & EVOLUTION

KNOWLEDGE BASE

INFORMATION EXCHANGE

SYSTEMIC SUPPORT

The Equitable Evaluation Initiative (EEI) is a time-bound initiative (2019-2024), that seeks to seed a field and sow a practice of Equitable Evaluation Framework™ (EEF) practitioners. The Equitable Evaluation Initiative (EEI) is a fiscally-sponsored project of Seattle Foundation. Both EEI and the EEI logo are their trademarks. The Equitable Evaluation Framework™ (EEF) is a trademark of jdcPARTNERSHIPS.

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