

PRACTICE
+
PRAXIS

themes emerged

EVALUATION

COACHING

CAMARADERIE

COLLABORATI

CONTEXT

COMMUNITY

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**Five Years of
Learning, Unlearning,
& Reimagining
Philanthropy...
Together**

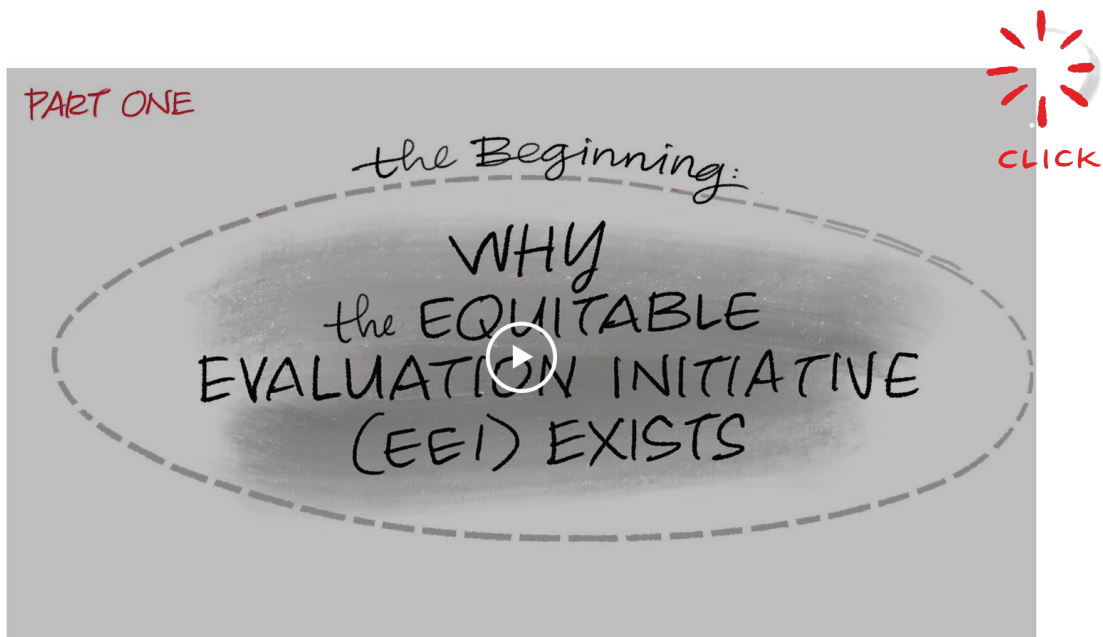
March 2024

HOW did we get here & WHY?

THE EQUITABLE EVALUATION INITIATIVE (EEI) launched in 2019 as a time-bound endeavor. It sought to shift the evaluation paradigm so that it became a conduit for and of equity. Without this different way of working and inquiry, evaluation practices risk reinforcing, or even exacerbating, the very inequities the change initiative sought to address.

Between 2019 and 2024, EEI supported and advanced:

1. A shared vision of evaluative practice that is more honest and contributes to creating a world in which we all thrive.
2. The expansion of the Equitable Evaluation Framework™ (EEF).
3. Shared inquiry in the evaluation and equity ecosystem about all aspects of the evaluative process.
4. Expansion of evaluation practice that challenges and embraces new pathways for and concepts of validity, rigor, and complexity.
5. A growing field of EEF practitioners.





EEI launches.

Making the Case Collaboratories begin. 228 organizations and 537 people participate.

2019



The EEF Practice Partner Experience launches.

44 foundations and 220 people participate in six total classes.

2020



EEI, in partnership with GEO, releases *Shifting the Evaluation Paradigm*, exploring the original expansion of the EEF, including Principles and Orthodoxies.

2021



Consultant & Nonprofit/Public Sector Pilots launch.

20 organizations and 52 people participate.

2022



EEI releases the latest expansion of the EEF..

Orthodoxies expand to include consultants, nonprofits/public sector, and PSOs. Mindsets, Tensions, and Sticking Points are introduced.

2023



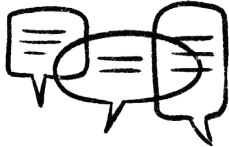
EEI announces their next phase of field-building.

185 Practitioners continue their exploration of the EEF.

2024

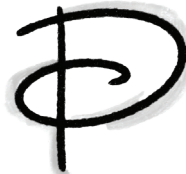
WHAT is here after 5 years?

The EEF Practice Partner Experience: Equipping for Transformation, rooted in the adoption and application of the EEF, is informed by the elements of a field.¹ The Pathway offers context, coaching, camaraderie, and collaboration, using evaluation as a starting point to expand ways of knowing. The EEF Practice Partner experience has three organizing and emerging pillars: conversation, practice, community.



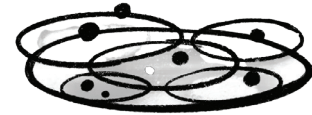
CONVERSATION

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. What we pay attention to and what we practice is what we value.



COMMUNITY

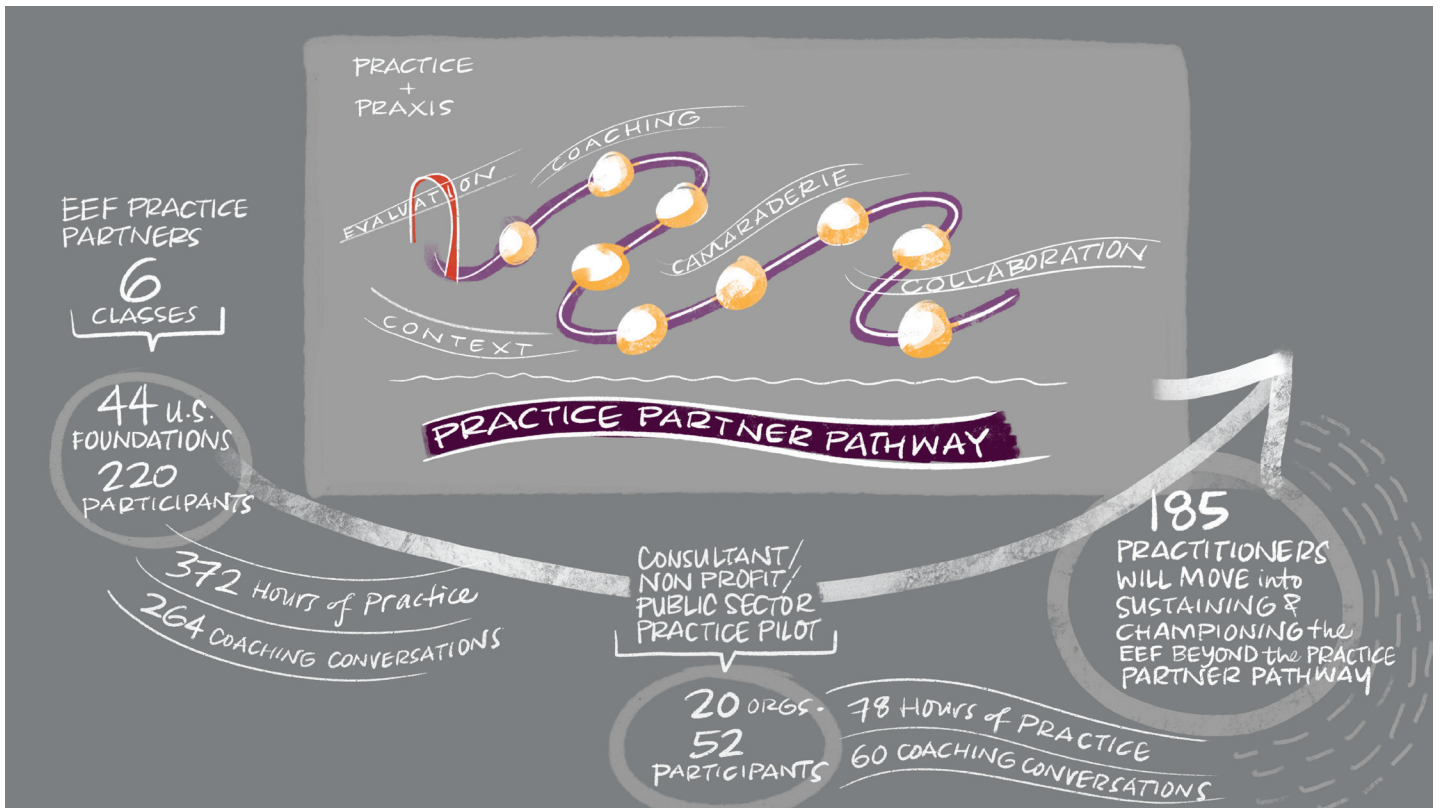
Our **community** in practice is made up of individuals who are active practitioners of the EEF and share what they are doing alongside others. When we are in community with each other, we learn how to be and do better.

These support and serve as through-lines across the EEF Practice Partner spaces held by EEI. The methods and modalities intentionally weave and thread within, between, and among.

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 of the Practice Partner Pathway allows for flexibility and recalibration and accommodates organic growth. It supports a living expression of the EEF that evolves alongside those in the practice.

Participants move from understanding the case for being, thinking, and doing differently to being in practice and community with others to adopting their new and different ways.

1. Elements of a field include: identity, infrastructure for collaboration, knowledge base, continuous learning and evolution, praxis, resources, information exchange, and systemic support. Adapted from Fine, M (2001) *What does field-building mean for service-learning advocates?*



A lot of the parts of the Framework are true of philanthropy at large. It's not specific to evaluation. **The EEF is a door that we entered, but we've walked in all sorts of different rooms using it.** And so we have this really great balance of program, operations, strategy, and evaluation folks in the conversation. So evaluation becomes the entry point to start having some of these conversations and then how do we expand beyond that?

- Practice Partner from a National Foundation

eeef Practicing the Equitable Evaluation Frame... Watch later Share

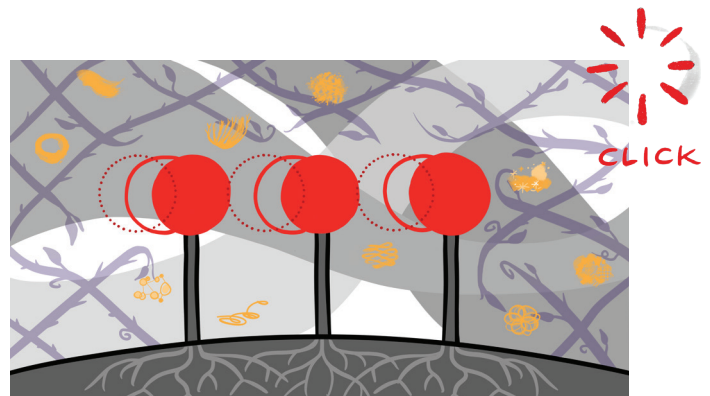
We need to uncover new ways of

Watch on YouTube equitableeval.org

CLICK

The Equitable Evaluation Framework™ emerged from early writings by EEI Founder, Jara Dean-Coffey, who helped introduce the term “equitable evaluation” to the United States field of philanthropy. The early EEF included a set of Principles and Orthodoxies. The first expansion of the EEF, *Shifting the Evaluation Paradigm: The Equitable Evaluation Framework*, was released in partnership with Grantmakers For Effective Organizations (GEO) in 2021.

In 2023, an expanded version of the EEF was released, including new elements: Principles and Orthodoxies for consultants, nonprofits, public agencies, and philanthropy-serving organizations, Tensions, Mindsets, and Sticking Points. This expansion was co-created with those in the practice and offered a collective exploration of new ways of being, thinking, and doing.



The EEF offers guidance, context, and underpinnings to explore, question, learn, and unlearn in ways that help inform actions and decisions. The EEF invites alignment of purpose, process, and policies in philanthropy. It offers multiple entry points to shift the ways in which we practice our work. Practice allows time and space for making the EEF real. Today, the Equitable Evaluation Framework™ (EEF) is a set of Principles, Orthodoxies, Mindsets, Tensions, and Sticking Points.

THE EEF HELPS the U.S. PHILANTHROPIC SECTOR
REIMAGINE POSSIBILITIES

FRAMEWORK AS A GUIDE

PRACTICE AS AN EXPLORATION

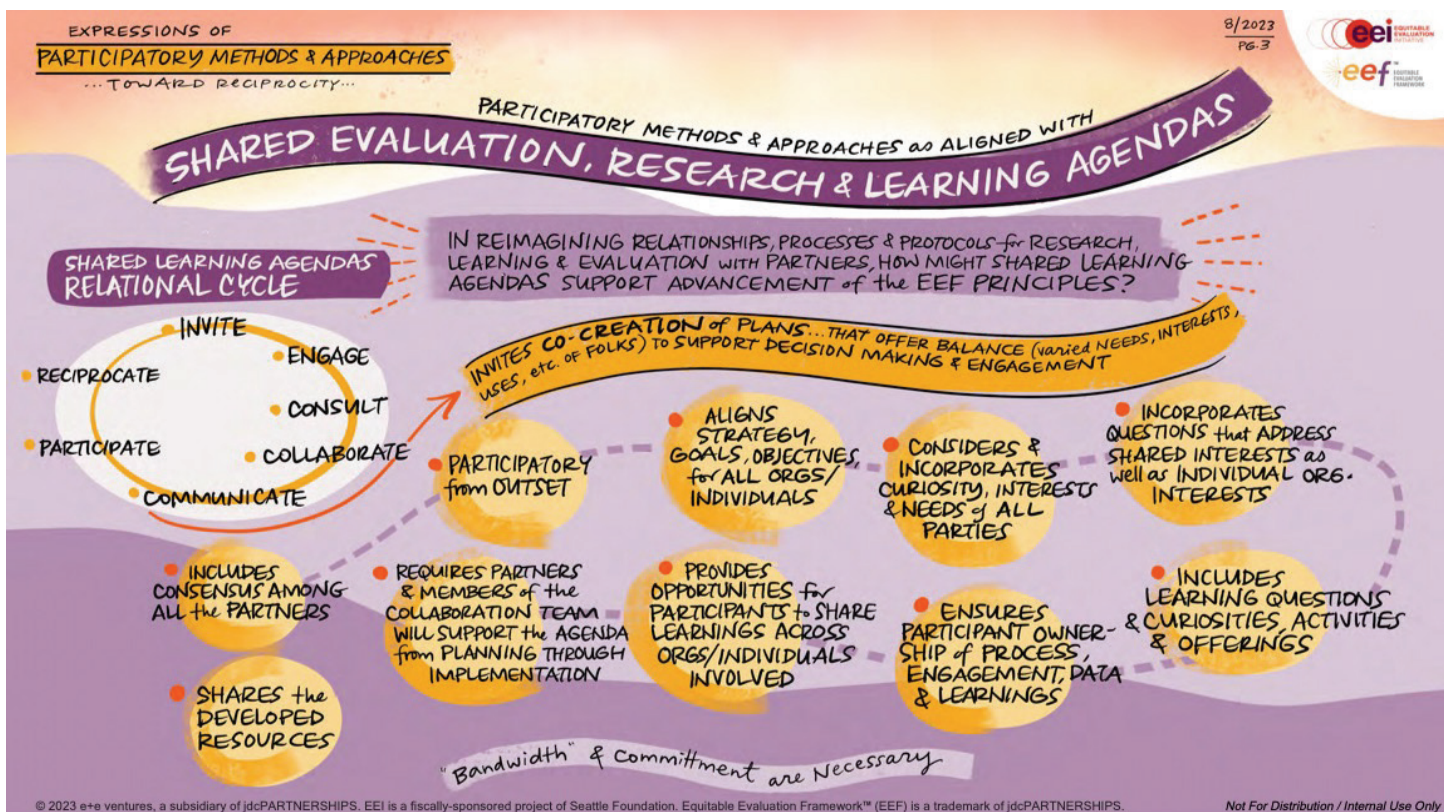
EEF is ABOUT
 UNLEARNING & LEARNING
 BEING CURIOUS &
 BEING THINKING DOING DIFFERENTLY

 A circular diagram with the words "BEING", "THINKING", and "DOING" arranged around a central point. An arrow points from "THINKING" to "DOING".

Research & Development plays an integral role in EEI's field-building work. The practice of the EEF is co-created, participant-centered, and shares an evaluation, learning, and research agenda: **What are our partners learning? What is EEI learning? What are we learning together?**

With our partners, we are reimagining relationships, processes, and protocols in an emergent and embodied research and development practice. We've developed a relation cycle that is rooted in advancing the EEF Principles, which expands definitions of objectivity, rigor, validity, and embraces the complexity of the practice and its application.

It is through this shared research and development practice we notice and surface the process by which shifting hearts and minds, engaging new practices, and the adoption of the EEF is happening.



This agenda has further enhanced field knowledge, creating partnerships with others in the philanthropic ecosystem to explore how particular methods, models, and approaches might be aligned with the EEF. It has also led to new research and ideas that influence a national conversation around evaluation in philanthropy, like the Special Issue of *The Foundation Review*.



WHERE do we go next?




BEGINNING WITH our own deliberate inquiry, then fielding inquiries from those already engaged with EEI and those curious about how they might come into practice, we began to explore a potential extension and expansion of our work. The following insights surfaced:

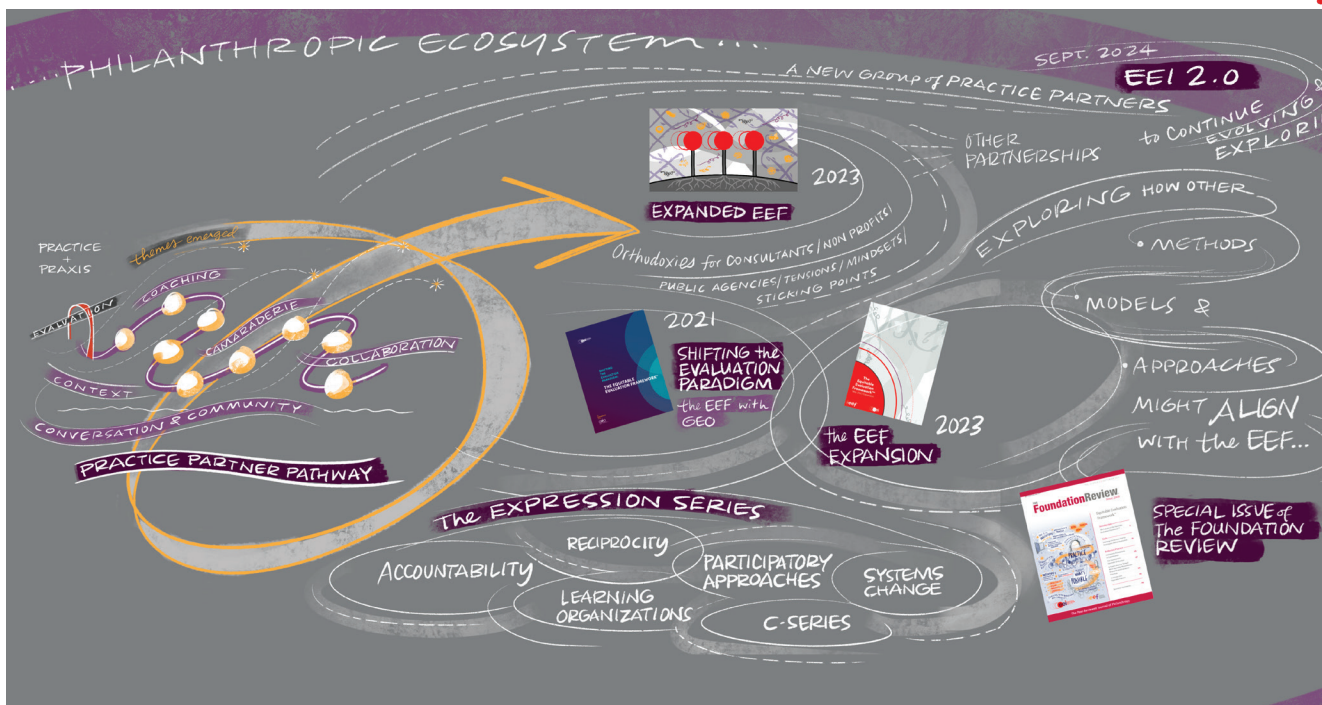
- 1.** The Practice Partner Pathway designed for foundations moves folks towards adoption of the EEF Principles and enhances their ability to challenge Orthodoxies, name Tensions, shift Mindsets, and move through Sticking Points. It shifts their work and, thereby, the work of their foundation. We will uplift and amplify these shifts.
- 2.** Nonprofits and Consultants would benefit from extending the one-year pilot to a two-year Practice Partner Pathway grounded in their history and context.
- 3.** Current EEF Practitioners wish to remain in community with each other and deepen their practice of EEF within and across their organizations and communities. This has led to the development of the EEF Practitioner space.
- 4.** There is increasing interest from additional foundations to move into the practice of EEF and amplify and align the work.
- 5.** There is greater reception to what EEF offers and opportunities to influence larger sector and ecosystem conversations.

Based on these insights, EEI is moving into a second stage of field building.² (See table on the next page.) During this next phase—EEI 2.0—we will continue to strengthen and expand the practice of the EEF.

“ I’m reflecting on a **new way of being that goes beyond evaluation**—a way of being in constant practice, constant work. I appreciate the space and time over two years to dig in around different ideas; in some ways we only scratched the surface in exploring ways of being, and now at the end of two years I am thinking about how can I come back and listen again, read again, try out something new.
How I can take what I’ve learned and explore further?

– Practice Partner from a National Foundation

	Emerge (2016-2019)	Form: EEI 1.0 (2019-2024)	Evolve & Sustain: EEI 2.0 (2024-2028)
Research 	<ul style="list-style-type: none"> National research, early writings, and underpinnings for EEF development 	<ul style="list-style-type: none"> Expansion of the EEF to include additional Orthodoxies and Principles, Mindsets, Tensions, and Sticking Points Research and Development Agenda 	<ul style="list-style-type: none"> Continued R&D for field-growing work
Practice 	<ul style="list-style-type: none"> Entry point into Evaluation, Research, and Learning in Philanthropy 	<ul style="list-style-type: none"> EEF Practice Partner Pathway development and implementation with 44 foundations Pilot of the Practice Partner Pathway for nonprofits, public agencies, and consultants 	<ul style="list-style-type: none"> Launch of EEF Practitioner Community Practice Partner Pathway for up to 40 new foundations Revised Practice Partner Pathway for consultants and nonprofits
Field Growing 		<ul style="list-style-type: none"> Engagement strategy for Practice Partners 	<ul style="list-style-type: none"> Movement Building + Community Engagement Strategy





(The EEF) is an opportunity to pause and slow down and reflect and ultimately be ok with incremental change rather than home runs. It's an opportunity to step back and be less foundation-y, less top-down and less centering the foundation and what we need, flipping that around a little bit to be about what others need.

- Practice Partner from a Regional Foundation

FRAMEWORK
is a GUIDE

IMAGINE POSS

EEF is ABOUT
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BEING

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