

Community-driven Trust-based Evaluation: A Practitioners' Brief

Overview:

Informed by national conversations around power, equity, and justice relating to historically excluded communities, grantmakers recognize that sustainable community impact must be developed by and in partnership with communities. To ensure this impact, foundations seek ways to support inclusive and meaningful community engagement in assessing their goals, strategy, and impact. In response, this brief recommends adopting a *community-driven trust-based evaluative* approach informed by literature on community engagement, Trust-based Philanthropy, and foundation-wide evaluation. It provides considerations and actionable guidance for foundations applicable before engaging in and during such an undertaking.

Scope of the practice guide:

This guide aims to help funders better understand how to support, elevate and incorporate community engagement in evaluative efforts. Specifically, this guide focuses on recommendations when adopting a community-driven trust-based evaluative approach. It emphasizes valuing mutual trust relationships, developing a culture of learning, and developing reciprocal and power-sharing evaluative practices.

Recommendation 1. Commit to a Trust-based Community Engagement Approach

When funders embrace a trust-based evaluative approach, they can partner with community leaders and members. Committing to a trust-based community engagement approach entails viewing and valuing communities as knowledge producers and as equal partners. It also means that funders honor the knowledge of communities by adopting the belief that those affected by a decision have a right to be involved in the decision-making process. At the core of this approach is valuing relationships, flattening power hierarchies, and embracing collaboration and reciprocity.

Suggestions to carry out Recommendation 1:

1. **Ensure a predisposition to community engagement from all foundation leadership and staff.**

- a. This is important because if the majority are not predisposed to this type of work it will create a series of challenges and obstacles moving forward. A way to accomplish this is by providing sufficient training on what community engagement is as well as the affordances and drawbacks. Providing examples of how other foundations have successfully engaged in these efforts is another way to bring people on board.
2. **Establish relationships with communities by partnering with and investing in organizations that are most proximate to the community.**
 - a. Seeking the wisdom and input from proximate leaders is a way, funders can bridge their lack of proximity to communities while simultaneously expanding and strengthening their networks.
3. **Secure funding at the outset of planned efforts.**
 - a. The success of these efforts depends on building and sustaining a variety of relationships. Internal capacity building, relationship building, and ongoing learning efforts take time and resources thus it is imperative for funds to be adequately planned and secured.

Potential Roadblocks and Solutions:

1. If funders encounter hesitations to trust-based community engagement approaches they must take a moment to revisit and reconnect with the foundation's values and commitments to communities. For the most part, the impetus for community engagement is the recognition that these efforts are needed. Thus, when encountering roadblocks it is advisable to remind themselves why they are doing the work and be willing to face their challenges.
2. When funding becomes an issue, funders must grapple with the possibility of a tradeoff in terms of the quality of the efforts. Not having sufficient funds to cover the labor-intensive efforts can leave those involved feeling undervalued and underappreciated. If this happens people can lose interest and not continue with participation.

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Recommendation 2. Develop a Culture of Learning

The rationale for developing a culture of learning is that evaluation is a core learning practice. This means that grantmakers and their grantees use evaluation to explore the results of their work and how to make improvements. When evaluation is viewed through the prism of learning it allows for evaluation to move from a one-time function to an ongoing process¹. This involves people working together to collect, analyze and evaluate data to generate new learning about their work. This is the direct link to grantees, community organizations, and community members.

Suggestions to carry out Recommendation 2:

1. **Engage in learning at three levels.**
 - a. **Within** grantmaking organizations: learning from experience and sharing learning with staff and board for improved results.
 - b. **Across** grantmaking organizations: sharing successes, failures, and challenges so colleagues do not reinvent the wheel.
 - c. **In partnership** with grantees: building open and honest relationships based on shared goals and a shared commitment to change.
2. **Adopt a learning practice stance toward evaluation.**
 - a. View evaluation as an ongoing process rather than a one-time function. This allows for learning to happen as an ongoing process, culture, and commitment to support the capacity of people to reflect on their work and how they can make improvements. Another name for a learning practice stance in the field of philanthropy is organizational learning².
3. **Work with grantees, community organizations, and members to collect, analyze, and evaluate data.**
 - a. Learning with grantees and community members is an emerging practice that is not widely embraced in the philanthropic world yet one that is sorely needed³. This is a great way to involve the community in evaluative work that is beneficial to all involved.
4. **Embrace evaluation as learning how to improve the work of everyone involved to achieve shared social justice goals.**

- a. Changes can be made to the evaluation questions to focus on grantees' and communities' needs to include them as users of the evaluation along with foundations.
- b. This allows evaluation to be about more than just measuring and improving grantmaker results but also about making learning a driver of philanthropic success.

Potential Roadblocks and Solutions:

1. The main roadblock to carrying out this recommendation is the required capacity building for foundation staff. In order for a culture of learning to flourish, an organizational culture must already be in place supportive of learning and assessment. When there is a predisposition to learning it allows for capacity building to be positively received. In our case, it would allow for a trust-based community engagement approach to be embraced.

Recommendation 3. Embrace Trust-based Evaluative Practices

Trust-based Philanthropy is a framework that addresses inherent social, political, and economic power imbalances between foundations and nonprofits by interrogating and reimagining relationships⁴. These reimagined relationships are built on vulnerability, transparency, and humility calling for funders to bring an awareness of power and equity to their grantmaking. The framework aids in the cultivation of mutual trust relationships with communities and developing reciprocal and power-sharing evaluative practices. Bridging trust-based evaluative practices with community engagement principles offers us a set of criteria in support of a community-driven trust-based evaluative approach. Ultimately, Trust-based Philanthropy seeks to "flip the script on traditional philanthropy"⁵ by:

- Working for systemic equity
- Redistributing power
- Centering relationships
- Partnering in a spirit of service
- Being accountable
- Embracing learning

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Suggestions to carry out Recommendation 3:

1. **Engage in self-reflection efforts to examine power relationships and be willing to give up some control.**
 - a. Learn about and recognize the racial, economic, and political inequalities in which we operate and how they show up in your foundation. Take an antiracist⁶ approach to make the necessary changes in practices and behaviors.
 - b. Be willing to share power with grantee partners and communities who are closer to the issues of concern recognizing them as experts and knowledge bearers.
2. **Partner in a spirit of service leading with trust, respect, and humility.**
 - a. Revisit your foundation's values with a trust-based lens to notice if power, relationships, and biases are accounted for. Partnering with communities in genuine power-sharing ways cannot happen without aligning a foundation's internal values with trust-based values⁷.
 - b. Be a supporter and collaborator rather than a dictator of solutions. Solicit and implement the input from grantees and communities affected by inequities to define what constitutes success for strategies. This is part of flattening long-standing power hierarchies in philanthropy.
 - c. Be accountable to those whom you seek to support by focusing the evaluation lens on the foundation itself, its practices, and strategies and not solely on grantees or their programmatic strategies.
3. **Shift the perspective of evaluations from objective and generalizable to one that accounts for nuance and bias.**
 - a. For the most part, evaluations are designed to provide synthesized, generalized findings

that flatten complexity and disregard historical and systemic inequalities. Acknowledge that systems change is not easily quantified and that approaches must be attentive to specific community needs and context by recognizing that generalized approaches do not work across all communities.

- b. Evaluators often interpret data and draw conclusions in isolation and without attention to bias resulting in a hierarchy of experts excluding communities as knowledge producers⁸. Part of establishing trust-based evaluative approaches entails valuing communities' cultural and historical orientation to knowledge and data by including them throughout the process.

Potential Roadblocks and Solutions:

1. A possible roadblock is a lack of shared agreement from foundation leadership and staff regarding the adoption of trust-based values and practices, including evaluative ones. If grantmakers want to genuinely match their commitments to sustainable community impact they must be willing to move away from status quo approaches to evaluation and embrace more equitable ones. Funders can ensure this shift by implementing a trust-based approach to their overall culture to provide all leadership and staff with a solid guiding marker.
2. Another roadblock is the shortage of evaluators who are trained in trust-based and more equitable methods. Funders might have a bit of a challenge finding a well-versed evaluator to lead their team on this emerging yet exciting way of doing foundation-wide evaluation. A great place to start is with the Equitable Evaluation Initiative⁹.

¹ Evaluation in Philanthropy: Perspectives from the Field (2009).

² Evaluation in Philanthropy: Perspectives from the Field (2009).

³ Is Grantmaking Getting Smarter? A National Study of Philanthropic Practice (2008).

⁴ Trust-Based Philanthropy. <https://www.trustbasedphilanthropy.org/purpose>

⁵ Trust-Based Philanthropy. <https://www.trustbasedphilanthropy.org/values>

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⁶ Fair, S., & Canales, J. (2020, September 15). *The Barr Foundation's Journey to Become an Antiracist Organization*. <https://www.peakgrantmaking.org/insights/the-barr-foundations-journey-to-become-an-anti-racist-organization/>

⁷ Trust-Based Philanthropy. <https://www.trustbasedphilanthropy.org/values>

⁸ Equitable Evaluation Framework (EEF) Framing Paper. (2017). Equitable Evaluation Initiative. www.equitableeval.org

⁹ Equitable Evaluation Initiative <https://www.equitableeval.org>