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

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SREE/Grantmakers for Education Summer Fellow 2022

November 22, 2022
Outline
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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

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

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

Overall Recommendation:
Adopt a community-driven trust-based evaluative approach
Project Successfully Addresses Scope

1. Identify parameters and considerations for determining a community in a given scope
   - Addressed in part two on community engagement (literature review)
   - Attended by recommendation 1 (brief)

2. Develop a set of criteria to support community-driven evaluation
   - Addressed in the first subsection of part four on bridging
   - Attended by recommendations 2 and 3

3. Advance practical guidance and precautions for how to incorporate community engagement in evaluation
   - Addressed in second subsection of part four on bridging
   - Attended by recommendations 2 and 3
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

Increasing Levels of Community Engagement:

- **Inform**: Some community involvement
  - Establishes communication channels from foundation to community

- **Consult**: More community involvement
  - Develops connections for bidirectional communication flows

- **Involve**: Better community involvement
  - Establishes partnerships for cooperation

- **Collaborate**: Integrates community involvement
  - Forms partnerships with community on each aspect of work

- **Co-lead**: Strong bidirectional relationship
  - Final decision-making is at the community level

Increasing Levels of Impact, Trust, and Communication

**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
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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