



## PRINCIPLES

*Foundational guideposts of the Equitable Evaluation Framework*

### **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.

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

- Multi-culturally valid, and
- Oriented toward participant ownership.

### **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.



## ORTHODOXIES\* (*Foundations*)

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

### *Emerging:*

- The foundation defines what "success" looks like.
- Grantees and strategies are the evaluand, but not the foundation.
- The foundation is the primary user of evaluation.
- Evaluations should provide generalizable lessons.
- Evaluators should be selected based on credentials that reflect traditional notions of expertise.
- Evaluators are the experts and final arbiters; grantees are beneficiaries.
- Credible evidence comes from quantitative data and experimental research.
- Evaluators are objective.
- Evaluation funding primarily goes to data collection, analysis, and reporting.
- Time frames / short-term outcomes as indicators of good stewardship.
- Evaluation in service of foundation brand.
- Trust / relationships come from doing the work, but are not the starting point.
- Accountability is one-sided set of expectations, generally set by the foundation, rooted in contractual compliance of grant partners, consultants, etc.
- The fast-paced production of deliverables demonstrates "impact" and "outcome."

Note: There are sets of orthodoxies that overlay for foundations, consultants, nonprofits & public/government agencies, and philanthropic serving organizations (PSOs): [www.equitableeval.org/post/eef-expansion-orthodoxies](http://www.equitableeval.org/post/eef-expansion-orthodoxies)

\* Rhonda Evans, Tony Siesfeld, and Gabriel Kasper. n.d. "Challenging Orthodoxies." Deloitte. <https://www2.deloitte.com/us/en/pages/monitor-institute/articles/re-imagining-measurement-redefining-standard-practices.html>

# The Equitable Evaluation Framework™

## Shifting the Paradigm

### MINDSET SHIFTS

A set of mental attitudes to be shifted toward.



### TENSIONS

Inherent strains to be named, navigated, and normalized.

- Social positions and roles ~ Influence, organize, mobilize
- A thing ~ A body of work
- Individuals ~ Organizations ~ Systems
- Technical approaches ~ Conditions for change
- Use and adaptation ~ Acknowledgement and attribution
- Urgent and Reactive ~ Aligned and Responsive



### STICKING POINTS

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

- Inviting Vulnerability and Risk
- Willing to Stay in Conversation
- Defining Equity (as means and ends)
- Reframing Current Asymmetrical Evaluation Discourse
- Staying in Practice Over Time

