2018
FUNDING FORWARD

FUNDERS FOR LGBTQ ISSUES

THE ANNUAL GATHERING OF GRANTMAKERS COMMITTED TO LGBTQ ISSUES

new orleans ⚜ march 14–16

WELCOME

Evaluation & Strategic Learning for Social Justice Funders

Introduction

The objective of this workshop is to help funders adapt traditional evaluation and learning to serve social justice work. During our time together we will reflect and explore on different evaluation approaches relevant to the works LGBTQ funders support

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The State of Evaluation in Our Organizations

Use the Color Coded Post-Its…

- What is your foundation/organization doing on evaluation & learning? (Color 1)
- What's working? (Color 2)
- What's not working, i.e., what are your challenges? (Color 3)

Evaluation Concepts

Measureable - Meaningful - Manageable

Guiding Principles

- Make it <u>manageable</u> so it is used
- Make it <u>actionable</u> so it is useful
- Make it all about <u>learning</u> and not all about accountability
- Stress <u>Contribution</u> not Attribution
- Make it <u>measurable</u>, where possible
- Don't confuse <u>Outcomes</u> with Outputs

Evaluation Framework

- **Questions**: what we are trying to understand about the process and outcomes
- **Goals**: larger, longer-term aspirations
- **Outcomes**: what we will strive to achieve over an X-year time period in each of the goal areas
- **Indicators**: the way we'll know we're making progress on outcomes (Specific, Measurable, Attainable, Relevant, Time-bound=SMART)
- **Baselines**: measurable starting places
- **Targets**: measurable end points for the outcomes (numerical targets or amount above baseline)

Example:
Trans Movement Building

- **Question:** Has the Initiative helped to strengthen the trans movement?
- **Outcome 1:** Increased # of trans orgs with infrastructure
- **Indicator/Target:** Increased # of trans orgs have full-time paid trans staff/50% of orgs & 25% over baseline
- **Outcome 2:** Increased capacity of trans orgs to request and receive grant funding
- **Indicator/Target:** Increased # of trans orgs receiving grant funding/33% & double baseline

Evaluation and Social Justice

Defining Evaluation

"Evaluation is a process that critically examines a program. It involves collecting and analyzing information about a program's activities, characteristics, and outcomes. Its purpose is to **make judgments** about a program, to **improve its effectiveness**, and/or to **inform programming decisions**" (Patton, 1987)
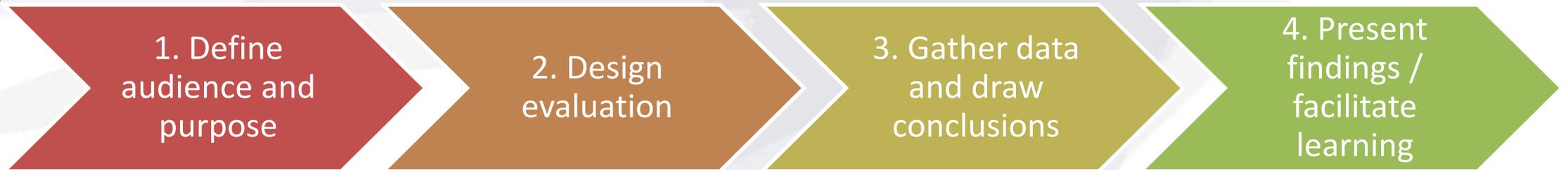
Defining social justice programing

- **Civic engagement activities**
- **Community organizing**
- **Infrastructure development**
- **Judicial advocacy and litigation**
- **Leadership training**
- **Legislative advocacy**
- **Movement building**

Common Characteristics
- Addressing root causes
- Non-linear
- Based on context
- Responsive to current events
- Communities actively participate in the change process

Adapting traditional evaluation to serve social justice work

1. Define audience and purpose

2. Design evaluation

3. Gather data and draw conclusions

4. Present findings / facilitate learning

Rather than trying to fit social justice programs to the typical evaluation model, let's re-define evaluation the evaluation process

1. Define audience and purpose

Rethink the focus and main audience for the evaluation

"effective evaluations can **enable all partners** in social justice work – **funders as well as activists** – to **determine if, to what extent, and how** their assumptions and strategies lead to the results that they are committed to achieving, and help them **transform their own assumptions and strategies** to better reflect reality"

Source: Evaluation Frameworks for Social Justice Philanthropy: Review of Available Resources, Daylight Consulting Group for the Ford Foundation Working Group on Philanthropy for Social Justice
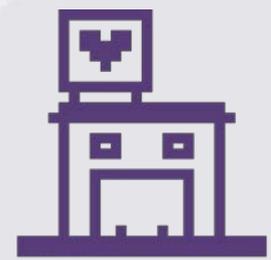
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2. Design evaluation

Model social justice values in your design
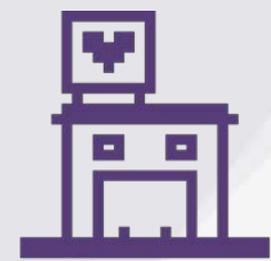
Selection

Outcomes

Timeline

Methods

Created by Lil Squid from Noun Project

Created by Doub.co from Noun Project

Created by Doub.co from Noun Project

Created by Doub.co from Noun Project

3. Gather data and draw conclusions

Ground your design on social justice oriented evaluation approaches

- **Participatory evaluation.** Actively and intentionally involves stakeholders, including grantees and communities, in the evaluation process.

- **Strategic learning.** Uses data and information to understand how strategies are working and under what conditions and contexts

- **Queer critical race theory focused evaluation.** Contains social justice components for race and sexual orientation

- **Culturally responsive evaluation.** Considers the historical, social, cultural, political, and economic context of the communities served by a program

- **Systems-oriented evaluation.** Considers the factors and actors inherent in the larger systems in which a program is embedded

3. Gather data and draw conclusions

Implications of queer Crit in evaluation

Evaluation should…

1. Capture the unique experiences of queer people of color

2. Bring different points of view that challenge mainstream ideologies written by cis, heterosexual, white males

3. Help create a different grand narrative for queer communities

4. Be centered in the experiences of queer people of color

5. Capture the experiences of different members of the community using different methods

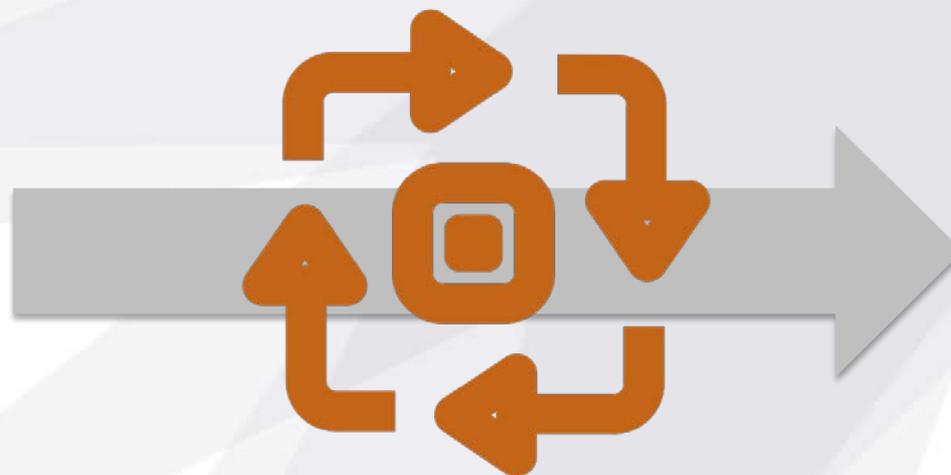6. Contribute to eliminating racism and homophobia/transphobia

4. Present findings / facilitate learning

Focus reporting on long-term change over short-term gains

Created by Mooms
from Noun Project

Created by jngll
from Noun Project

Created by Marco Galtarossa
from Noun Project

Source: Considering Evaluation: Thoughts for Social Change and Movement-Building Groups, Catherine Borgman-Arboleda and Helene Clark

4. Present findings / facilitate learning

Other considerations related to reporting

- **Engage various stakeholders in sense making** of the evaluation findings and next steps

- **Make evaluation findings accessible** to grantees and communities – use common language, highlight relevant findings, and translate if needed

- **Use storytelling and case studies** to elevate the stories of the communities we serve

Strategic Learning
What – So What – Now What

Strategic Learning

- Using data and information from a range of sources to understand how your strategies are working and under different conditions and contexts…

- …and then <u>adapting strategy</u> in response to that information so that you can achieve more, faster

5 Habits that Promote Effective Strategic Learning

1. Make Thinking Visible
- Identify assumptions that underlie your theory of change – "if we do this, then this will happen"
- Approaches:
  - Before & After Action Reviews
  - Detailed theory of change

5 Habits that Promote Effective Strategic Learning

2. Pose Powerful Questions

- Helps focus learning, guides data collection and analysis, increases likelihood that answer(s) will be applied to the work

- Approaches:
  - "How can we….?" "What would it take to…"
  - Learning agenda

5 Habits that Promote Effective Strategic Learning

3. Gather, Access, Share Data & Knowledge

- Focus on data linked to learning questions.

- Approaches:
  - Access a wide variety of objective sources
  - Create templates & protocols

5 Habits that Promote Effective Strategic Learning

4. Pay Attention to Causal Inferences

- Strive to understand not just how your work drives results (or doesn't), but also what else is driving results.

- Approaches:
  - Qualitative data: stories
  - Confirmation from the field

5 Habits that Promote Effective Strategic Learning

5. Develop norms, culture, workflows that encourage reflection and adaptation

- Integrate learning into day-to-day activities and interactions; push each others' thinking

- Approaches:
  - Assign "cheerleader" "devil's advocate" roles
  - Create learning champions