The Colorado Health Foundation™



Transforming Our Evaluation Practice: Examples and Case Studies

Our Learning & Evaluation team continues to wrestle with practicing evaluation in more equitable ways. Since 2018, we've deeply engaged in this journey with the Equitable Evaluation Initiative, and as we work to create equity-aligned evaluation practices, we toggle between a focus on being, thinking and doing. This means regularly reflecting on who we are in relationship with our work (and the implications of that for ourselves and others), our beliefs about what it means to do rigorous and valid evaluation work, and the specific actions we should take to create evaluations that are better aligned with principles of equity.

In a previous blog post, we shared ways in which we've been honing our skills around noticing and questioning the choices we make about evaluation:

- What the evaluation focuses on
- Who gets to make decisions about outcomes and what success looks like
- Whose values are being prioritized in the way we design and carry out the evaluation
- How we share power over the evaluation with those in community

As a continuation of that story, we wanted to share some specific ways in which we've been evolving.

Our Practice at the Foundation

There are many ways – big and small – that we've shifted our evaluation practices at the Foundation over the last few years. What we highlight below are changes that have helped us make important steps towards infusing principles of equity into both evaluation processes and outcomes.

- **Participatory and collaborative elements**. We've intentionally sought out opportunities within our evaluations for stakeholders (e.g., grantees, community members, local nonprofits) to be engaged in the evaluation. This might include participating in the design of the questions or data collection, engaging in the interpretation of findings or providing insights into how they think about defining success. Participatory approaches allow us to hear new perspectives, adjust our own thinking and understand more deeply the different ways that people understand and experience what's happening in their communities. It provides an opportunity for us to share power over evaluation by elevating the perspectives of other stakeholders to inform our thinking and action.
- **Centering lived experience**. Over the last few years, we began to center the voices of those with lived experience in our evaluation studies – that is, we want to hear directly from those who are or have been impacted by that issue or that solution. We intentionally seek out those with lived experience as experts in both issues and potential solutions – whether we're assessing community needs or evaluating work the Foundation is already funding. Incorporating the perspectives of those with lived experience increases rigor in our evaluation practice, as it allows us to more clearly understand and center expertise from those who are closest to – and therefore best understand – problems and solutions. We engage those with lived experience in ways that help us interrogate our own thinking about what is causing the problem, what solutions might work or how they're experiencing existing solutions, and how we're making judgments about success.
- **Foundation as part of a system**. Taking a cue from the work of john powell, we have been experimenting with how our evaluation studies can both help us assess the work the Foundation engages in with communities, as well as illuminate the broader system in which that work sits. Knowing that systems perpetuate inequity, this approach to evaluation helps us better see the

conditions which are creating and perpetuating those inequities. This enables us to more accurately assess the ways in which the Foundation's work is creating momentum, how and where the work is falling flat, and even how we might be unintentionally perpetuating inequities within the very systems we are seeking to change. This type of evaluation evidence helps us make smarter decisions about how to engage in the work, how to overcome barriers and how to achieve more equitable outcomes. It also helps us test assumptions about the nature of the problems we are working on, how change happens and the anticipated impact of our work.

Our Shared Practice with Evaluation Partners

Our Learning & Evaluation team regularly contracts with external evaluation partners to conduct evaluations about the work of the Foundation. Together, we collaborate on the design, implementation and use of evaluations. We seek to have collaborative relationships with our evaluation partners. In recent years we have tried to be intentional about creating conditions where we are in true relationship with one another, so that our partners can reflect honestly on the ways in which we are succeeding, and how we are falling short of our own aspirations (both as a Foundation and as a Learning & Evaluation team).

We asked some of our partners if they'd be willing to create short case studies of their thinking and practice, so they could share the ways in which they think about and practice equity. As you read the three case studies below, you'll see some common themes.

- Change Matrix Case Study
- Vantage Evaluation Case Study
- Westat Case Study
- Omni Institute Case Study (2024)

Our evaluation partners think a lot about:

- The importance of trust and relationships – whether that's between their evaluation team and the Foundation team, or the relationships they have with grantees and community members
- Doing intentional reflection on how to embed equity within the evaluation design, while recognizing there is no single right decision and they need to consider context and practical constraints (such as time, money and burden on grantees)
- How to engage in collaborative and participatory ways throughout the evaluation, so they can leverage the voice, perspectives and community expertise
- Using what's being learned through the evaluation to help the Foundation change its thinking and how it does the work in alignment with equity and in service of impact

As we continue broadening and deepening our evaluation work, we look forward to sharing more about how we're evolving our practice, and what we're learning from our partners and others to better align with principles of equity.

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