

Change Matrix – Who We Are

CM, which formed in 2008, is a women-owned, minority-owned, small business that works to motivate, manage, and measure change to support communities and systems that improve lives. Our approach to evaluation is to integrate culturally-responsive and equitable evaluation principles. We view ourselves as learning partners who engage in exploration and inquiry with clients and communities. Our approach to learning is collaborative, where we draw knowledge from multiple experiences and perspectives. We use this to collectively identify change strategies that community members support and see a role for themselves to engage in.

Healthy Places Overview

The Colorado Health Foundation funded *Healthy Places: Designing an Active Colorado*, to support communities to become healthier places to live, work, and play. Supporting seven communities has resulted in improvements in the built environment and increased physical activity programming to support more movement, connection, and fun. Over the two funding cycles, this initiative has increasingly emphasized health equity as a cornerstone of this work and the importance of engaging the community so that grant activities are community-informed and community-led.

Evaluation – CM’s Approach to the Work

During the second funding cycle, the Foundation found itself seeking a new evaluator and contracted with Change Matrix (CM) as the learning and evaluation partner. We were pleased that the Foundation welcomed our suggestion to use a culturally responsive and equitable evaluation (CREE) approach, as equity is a value for both the Foundation and CM. We wanted to be thoughtful in how we engaged the grantees, considering they were midway through their funding cycle and were now going to transition to working with a new evaluation partner. As if joining a project in process didn’t present its own set of challenges, this project officially kicked off in March 2020, as we (and the world) began to realize that work as usual was not going to be possible. So, the following were some of the ways we were able to incorporate a CREE lens given the adaptations we had to make in a new pandemic environment.

Start with the relationships. At CM, we often state that all of our work starts with relationships, because we believe that strong relationships are the foundation to creating change. Striving to develop relationships and build trust are a core value of CM. Luckily our project kicked-off right before the COVID-19 quarantine and we were able to meet with the Foundation staff in person. It was helpful to hear about the prior evaluation work, what shifts they were hoping to see, and what they wanted to learn. Unfortunately, COVID-19 derailed our plans for grantee visits. There is no substitute for meeting with community members in person, sharing a meal, and having them talk about their community and the changes they are hoping to see. But, after a delay, we did what everyone else was doing – and scheduled Zoom calls with each of the grantees. We wanted to use these early calls to create space for grantees to reflect on their experience during an unprecedented time and how they were all stepping up in this crisis and meeting community needs. While this was not how we envisioned our ‘getting to know you’ meetings, we hope the grantees sensed our genuine interest in this work, admiration for what they were accomplishing during difficult conditions, and our intent to help support them in our new role.

Acknowledge the history and what came before you. In the initial calls, we acknowledged the grantee contributions to the evaluation that preceded us. To lessen the burden on the grantees, we prepared as best as we could in advance of these calls through conversations with Foundation staff and reading

through grantee documents and reports. Asking follow up questions about their history during our grantee calls was also critical to understanding the context for barriers that hinder the work and supports that can be leveraged. Our perspective is that we enter in community relationships with both curiosity and humility – knowing that we have much to learn about the needs, challenges, and hopes of community members.

Center communities in this work. Before the COVID-19 pandemic, we had plans to engage communities in the evaluation process. We wanted to facilitate a participatory process that incorporated their input into changes in the design and implementation of the evaluation, including the formation of a learning community. In the end, we decided to not make any significant changes to the evaluation design and data collection schedule that was developed by the prior evaluator. We did take some time in the early conversations to share a little about our approach and also learn about their past evaluation experiences, to identify what we might continue and what we might leave behind. And in light of not wanting to impose additional burden on the grantees, we decided to continue with the prior schedule of speaking with the grantees on a quarterly basis. We also identified ways we could use the evaluation to support the grantees' work.

Reinforce focus on equity. As a cornerstone of the Healthy Places Initiative, we integrated equity-related questions into our interview guide, with a specific focus on community engagement. We are exploring how grantees are being inclusive in their grant activities and how they're reaching populations that are most impacted by inequities. We are documenting policy and environmental changes, and how these changes are addressing some of the root causes of inequities and contributing to more equitable communities. Over the past year, we have used these calls to document progress, but more importantly, to distill the learnings grantees are gaining through this work and to understand what support is needed.

Leverage evaluation learnings. The CM Team is invested in utilization-focused evaluation that generates information that is useful to both the Foundation and the grantees. Rather than waiting until the end of the grant cycle, we have shared information periodically so that we are able to co-interpret with Foundation staff, as learnings are relevant to their decision-making and strategy. Not surprisingly, grantees most often requested to know more about how the other Healthy Places grantees were approaching this work. We observed that grantees were seeking community and were interested in learning from each other. Often this kind of work feels isolating and hearing from other communities that they experience the same challenges, can feel validating. We suggested the Foundation organize a virtual meeting to create an opportunity for connection, which felt particularly important over this past year where many felt a sense of disconnection during quarantine. While the Foundation saw the potential value in convening grantees, they were initially resistant and eventually agreed once CM offered to plan and facilitate. This evolved into a three-part learning series that engaged community partners around a key topic area (i.e. built environment, physical activity, community engagement) and offered an opportunity for grantees to connect and ask questions.

Reflection and Learnings

We hope that in our role as a thought partner to the Foundation and grantees, we have offered them opportunities to learn and reflect and potentially change course as a result. At CM, we have reflected on this past year and our work supporting the HP Initiative and identified the following learnings:

- **Even the best approach will require flexibility.** As already shared, our team was excited about meaningfully engaging the Healthy Places grantees in revisiting the evaluation design and helping us think through what would be most useful for them. Given the context, we decided it was not the right time to engage grantees in an overhaul of the evaluation design.

- ***Be transparent with grantees.*** As we learned about grantees' experiences with the prior evaluator, we wanted to start our relationships with grantees by being clear about our role. Even though we shared the purpose of the evaluation on our initial call, we realized that it was helpful to reinforce this again at the start of each conversation. Grantees are better able to provide useful information when they understand how the information will be used. Another aspect of transparency is also sharing back findings with grantees, allowing them the opportunity to benefit from the evaluation, as they are just as important a stakeholder as the client funding this work.
- ***Evaluators are sometimes called to advocate.*** We see our role as a learning partner to facilitate learnings both between the Foundation and grantees, as well as across communities. At various times, we found ourselves not just sharing back findings with the Foundation staff, but also advocating on behalf of the grantees. Sometimes this meant challenging the standard approach taken by the Foundation, or challenging the assumptions they were making about what the grantees need and want.
- ***Learnings are most valuable when grantee voice is centered in the work.*** Evaluators sometimes find themselves in a place of tension, balancing the informational needs of their client with those of the community members that are the focus of the evaluation. And while the Foundation is funding this work, it is the community members that are doing the hard work of creating change. They are the ones generating the knowledge and the learning, and should be centered in this work.

Only a year into this work, we look forward to continuing to learn from the grantees and provide the Foundation with useful information that will impact future strategic decisions. We are hoping to share this information in a way that is meaningful. We know that *sharing data* in a way that engages the audience, *can lead to action and power* and tell a powerful story that can *influence and drive change*.