Presentation on Social Justice, Evaluation and Grantmaking – National Network of Consultants to Grantmakers.

Three points: 1) Tensions in evaluating social justice work, 2) The shifting role of evaluators, 3) Key strategies

Our clients

Foundations, donors, large int’l NGOs (WomenStrong Int’l, Palm Healthcare Foundation, CARE), also smaller advocacy, human rights/social justice and community-based organizations (Global Witness, PODER). Work both with orgs in US and in other countries. Generally the more learning focused evaluations (those that are more transformative, directly address social justice processes, goals) require setting up and implementing learning systems and are generally funded by larger foundations, NGOs (simply because smaller groups doing the work find it challenging to prioritize and resource)

*(Some foundations/programs aren’t necessarily social-justice focused, but someone at the foundation is interested in the lens we bring, and so our goal is to help them shift the focus of their work and to engage some of the questions around equity, race, etc.)*

Tensions in evaluating social justice work

Social justice work is systemic work[[1]](#footnote-1), in requires an understanding of highly complex systems dynamics, and thus how we perceive this system, and whose voices, observations we take into consideration in creating this understanding, directly informs the effectiveness of any strategy, as well as the values/purpose that drive it. Thus, the production of knowledge

(research/evaluation) obviously plays a huge role in this, both through our definition of whose knowledge is valid/credible, as well as who is involved in producing that knowledge. In sum…This work is simply not linear or predictable, and can’t be understood or captured through traditional methods, logic models…So some of the tensions are:

* Evaluations to support social justice work have a different set of requirements - more face to face facilitated discussion, more capacity building around HOW to listen and engage, often there are needs around interpretation and translation given participation requirements. This is a major shift from traditional evaluation, and their need to be explicit expectations established up front.
* Different timelines and time commitments. Participation takes time (thus extending timeline), and individual stakeholders need to carve time out of their busy schedules to engage (it’s not like a traditional evaluation where they fill out a survey, or give an interview)
* Requires shifts often in organizational practice, dynamics, hierarchies. This is perhaps one of the greatest challenges. New people need to be at the table, and the work needs to be based on the assumption that the new knowledge generated will actually inform decisions. This feels threatening to some people (Would say perhaps particularly true of funders we have to say – as part of the “evaluand” their strategy is part of what is being evaluated, along with grantees work.)
* Competing purposes – Often a desire to combine summative evaluations for case-making, accountability purposes (external audience) and learning-focused evaluations (practitioner, internal audience). While these purposes can be combined, there needs to be careful attention the type of evidence required for external audiences, and the degree to which the design for the summative evaluation (methods, etc.), can be effectively integrated, without creating on-due tensions, burdens that are clearly externally mandated.

The shifting roles of evaluators

We have found that evaluators can play a key role in this process, through designing and facilitating a process which:

* Activates connections between key actors, and allows for a deeper level of listening.
* Develops better knowledge to inform practice and action.
* Develops buy-in, ownership of process, and is authentically inclusive.

We need to hear from, engage a variety of stakeholders and actors in the change process. It requires careful listening, deep discussion around values, purpose, about what’s working, what’s not and for whom. For example, there needs to be a process for vetting basic assumptions around what justice means and what it will require to make progress.

Evaluators supporting social justice work, are learning catalysts, enablers, and can help design, and accompany an inclusive process. They can also hold a mirror to funders, as key actors in the process, to increase understanding on what their influence is on the work. There is a shift from the role of evaluator from *auditor* to *thought partner, learning broker* – both for grantees, and for foundations.

Key strategies

* Learning doesn’t just happen[[2]](#footnote-2). Spaces and process have to be designed and implemented. Collective meaning making, analysis or “sensemaking” is the most critical step in the process. This is when knowledge is generated, people feel ownership, and knowledge is activated, or has the most chance to inform innovation, adaptation.
* Ensuring that there is continuity between planning, strategizing and evaluation activities. It’s critical that at least some of the same people and key decision-makers are involved.
* People need to understand *why* they are doing this – this is not an add-on, *but a new way of doing the work*. The process itself is transformative (not just means to end, but end in itself).[[3]](#footnote-3) There are different ways of doing this…
* Resourcing learning activities. A portion of the funds, for example, need to be set-aside in direct support of this approach so that is intentionally and explicitly integrated into the organization’s work. (Incentivize with the hope that it will catalyze something that will become sustainable)
* Strong facilitation skills, both in creating dynamic inclusive processes that allow knowledge creation from a variety of perspectives, but also the ability to ask the hard questions, and raising often marginalized points of view (requires an understanding of social justice work, goals). Capacity building/training for grantees to facilitate.
* Consideration of alternative forms of reporting – Documentation of sensemaking sessions, video testimonies, bulleted memos in lieu of long narrative reports that no one will read. (Sometimes helpful to join forces with communication teams on best ways to document and share findings, reflections with a variety of audiences)
* Collection of data – there are way to systematically collect qualitative and quantitative data in ways that facilitate external analysis (while at the same time minimizing burden to grantees/groups). Sometimes what is required is support in documentation (grantees – not their strength, takes time, etc.).

THANK YOU!

1. Social justice work as has been said, is about shifting power relations, so that decision-making happens in such a way that that education models, political systems, gender constructs, etc. are no longer the domain of an elite few, or even an oppressive majority, but instead involve a process of coming to terms with distinct values, needs, and priorities and finding common ground in a way that acknowledges both our equal individual value, and our collective humanity. [↑](#footnote-ref-1)
2. So while learning has always been an implicit or intended out come of evaluation, it has seldom happened. Structuring a process for learning to happen, and for evaluative information to inform decisions and actions, is the new role for evaluators, and how they can support social justice work. [↑](#footnote-ref-2)
3. Though building connections, shifting ideas “I may not agree with your opinion, but I can’t disagree with your story, experience”. Depending on the group, connect with complexity science, people-driven- development, organizational learning, etc. (even traditional contemplative practices), whatever resonates, and helps them see the process as integral to the bigger social change picture. [↑](#footnote-ref-3)