

# Equitable Evaluation in Practice

Part of the impulse for Amplify Fund’s creation in 2017 was to center equity in all aspects of philanthropy including: leadership and governance, operations, grantmaking, organizational culture, and evaluation. This work was aligned with many other efforts in the philanthropic sector at the time, including the Equitable Evaluation Initiative\*, which sought to shift the paradigm in evaluative practices away from judgmental, extractive, foundation-serving approaches.

Given Amplify Fund’s commitment to “disrupting the status quo in philanthropy,” we were cognizant of the “orthodoxies” in our sector that challenge Equitable Evaluation Principles. So, we wrote a Request for Proposals (RFP) for an evaluation consultant with two stated goals.

Through the competitive process, we ultimately selected Frontline Solutions, a Black-owned consulting firm that was also dedicated to equitable evaluation.

\*Formed by a collaborative team from Luminare Group, Center for Evaluation Innovation, and Johnson Center for Philanthropy were researching ways in which foundations could use evaluation to advance equity.

## Request for Proposals (RFP) goals:

1. **To develop a learning agenda that engages grantees and centers their work/needs:** This agenda would capture lessons learned about racial justice organizing, or issue areas (e.g., housing, land privatization, reparations), that grantees could then apply to their work in real time.
2. **To evaluate ourselves, specifically asking how our practices help or hinder the work of our grantees:** We did not want a sanitized evaluation that showed us in a positive light, but rather, an honest assessment that allowed us to reimagine philanthropy in service of grassroots movement building.



**AMPLIFY FUND**  
NEIGHBORHOOD FUNDERS GROUP



## EVALUATION CONDUCTED EXTERNALLY

Over the course of three years, Frontline Solutions created three reports for Amplify:

<b>COVID-19: Grantee Needs &amp; Challenges (2020)</b>	<b>Local Funder Landscapes (2021)</b>	<b>4-Year Look-Back (2022-2023)</b>
<p>Frontline Solutions gathered data from our grantees about challenges, needs, and their relationship with Amplify Fund.</p>	<p>Each place-based report highlighted the local context, the state of funder collaboratives, how different foundations were approaching equity, and how Amplify Fund had and should operate in the funding ecosystem.</p>	<p>Frontline Solutions helped us embark on a year of reflection after our funders and grantees decided to extend Amplify Fund beyond the original 4-year lifespan. They gathered data on how the context, racial justice organizing, and the local funder landscape changed in each of our places since we began grantmaking.</p>

## EVALUATION CONDUCTED INTERNALLY

At the peak of the COVID-19 pandemic, Amplify Fund staff began organizing Amplification Sessions, which became the space for engaging grantees to gather lessons learned, capture needs, and provide technical assistance.

From 2020 through 2022, we also scheduled internal “reflection meetings,” which were facilitated conversations with Amplify staff and relevant consultants, to reflect on our own practices.

The practices that we reflected on included:

- How we do collaboration grants,
- How we develop local grantmaking strategies,
- The ways we support grantee learning,
- Our commitment to funder organizing, and
- Our approach to racial justice.



# LESSONS LEARNED

## **WHEN EVALUATING A NEW FUND, GIVE YOURSELF TIME FOR PRACTICES TO SETTLE**

Foundations are notorious for wanting fast results, and clear evidence of success. Given that norm, we felt pressure to develop an evaluation and learning plan before we even identified our places, practices, and grantees. This false sense of urgency led to an RFP that was conceptually sound, but not yet rooted in our actual work. It took us a few years to gain enough experience and information as a fund to actually reflect on our behaviors and gather lessons learned.

## **BUILD REFLECTION MEETINGS INTO WORK PLANS, SO STAFF CAN SELF-ASSESS PROGRESS.**

We began to hold internal meetings with staff and consultants to have honest conversations about whether our practices were aligned with our values. These meetings proved to be fruitful for documenting our work, holding ourselves accountable, adjusting our practices, and putting our values into practice. To avoid too much “navel gazing,” we are committed to including our Co-Leadership Committee members into this practice in 2024 and beyond.

## **SEPARATING GRANTEE LEARNING FROM OUR OVERALL EVALUATION EFFORTS RESULTED IN US BEING THE PRIMARY USERS OF THE EVALUATION.**

Soon after hiring Frontline Solution it became clear that the two components of our RFP (grantee learning and fund evaluation) actually required different relationships with grantees and thus Frontline should not hold both bodies of work. So Amplify staff took on grantee learning through Amplification Sessions and other activities. While this separation made sense from a capacity- and relationship-standpoint, the Amplify Fund evaluation became separate and less relevant for grantees. We believe the solution to this challenge is the next two lessons learned.

## **ENSURE STAFF HAVE A COMBINATION OF LEARNING/EVALUATION EXPERTISE AND PROGRAMMATIC EXPERTISE.**

In 2021, we hired a Director of Learning and Communications who has a background in research and evaluation and is also responsible for overseeing grantmaking in one of our places. This combination of evaluation and programmatic work means that all our learning practices are rooted in an understanding of the grantees’ needs and the grantees’ experience with Amplify Fund. Without a staff person that has both perspectives, foundations need to give third party evaluators enough time and opportunities to build relationships with grantees, which can be challenging for a research firm handling multiple projects.

# LESSONS LEARNED

## **INCLUDE A LEARNING PLAN DURING STRATEGY DEVELOPMENT.**

One of Amplify Fund's core values is to follow the lead of local movement leaders, and we do that by ceding decision-making power when it comes to our strategies. Starting in 2018, local advisors in each of our places identified goals, and capacities to reach those goals, but did not collectively decide on a plan for monitoring progress on the goals or the capacities. One reason for this was Amplify staff's fear that grantees would feel monitored, rather than having the freedom to experiment and make mistakes. Another reason was simply not having evaluation expertise during the local strategy development process to create a learning and evaluation plan at the ecosystem level (rather than individual grantee level). The result has been Amplify staff inconsistently collecting information about grantees across places, and not being able to make broad statements about progress. In 2024 and 2025, as we refresh our local grantmaking strategies with local advisors, we plan to incorporate learning/evaluation plans.

## **BE HONEST ABOUT THE LINK BETWEEN LEARNING/EVALUATION AND FUNDRAISING**

One of Amplify Fund's values is to operate as a learning community, so we talk about our learning and evaluation work as a principled practice. But in reality, we need to collect stories of our places and our grantees to share with funders what impact we are having. Since this was not part of our RFP or contract with Frontline Solutions, we created a separate process where we ask grantees to send us success stories and/or lessons learned at the end of the year. In this ask, we remind grantees that we are fundraising for Amplify Fund and individual grantees, so these stories are important, but we also make submission voluntary. To alleviate some of the burden on grantees, we are now creating clear structures for staff to collect, document, and share data that can be used for learning/evaluation and fundraising.

## **ATTEMPT CONSISTENCY IN EVALUATION/LEARNING STAFF.**

We know that there are many reasons consultants and staff move off of a project, but we experienced significant staff changes at Frontline Solutions and at Amplify Fund that made the project start and stop in unproductive ways. For example, because of shifts at Frontline Solutions, the evaluation consultants could not build strong relationships with Amplify grantees to gather honest, raw feedback. Also, the point person for the Frontline Solutions contract at Amplify Fund changed three times, leading to a lack of clarity and consistency. As much as possible, try to maintain staff for the duration of a learning/evaluation project.