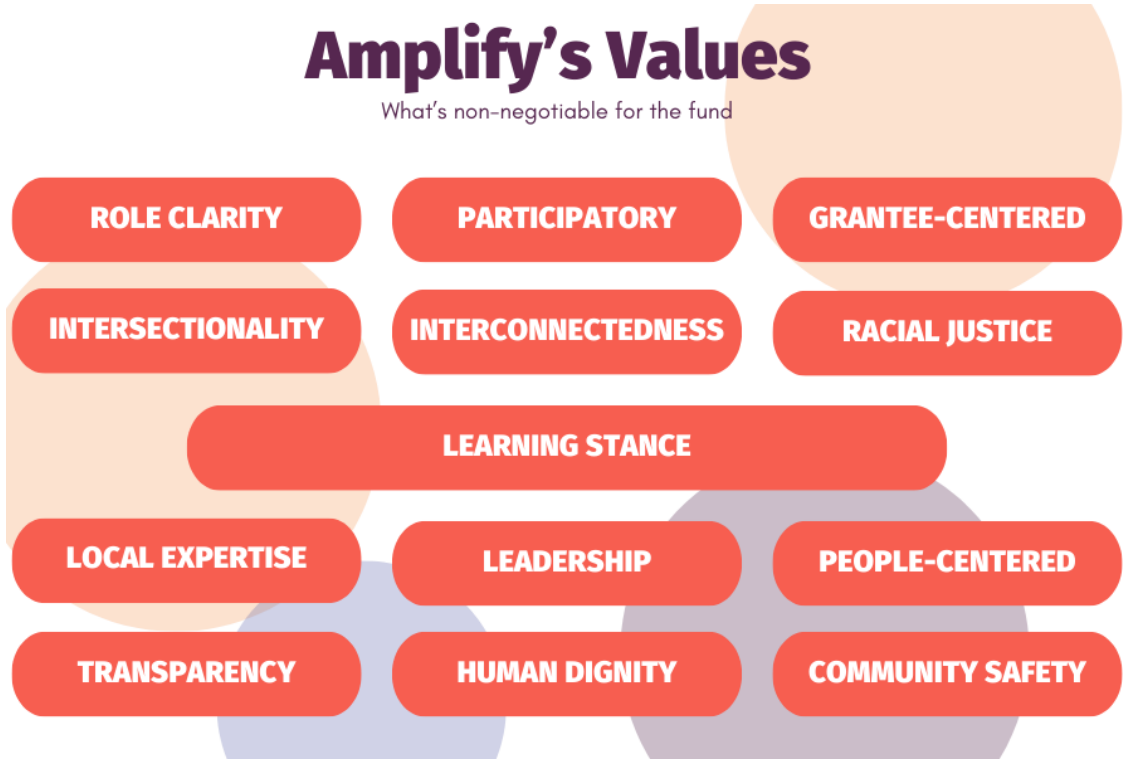


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Dear Friends,

We, at Amplify Fund, hold our value of “always taking a learning stance” dear. The value keeps us humble, and keeps us motivated to be better.

In practice, this looks like regular “reflection meetings,” which are facilitated conversations with staff and consultants to reflect on our own practices. When reflecting, we first describe what actually happened (i.e., what we did), and then, we talk about what challenges we encountered or successes we achieved. These reflections have allowed us to alter our own practices to better serve our grantees, and to share our learnings with the broader philanthropic community.

Our latest reflection report is on [implementing equitable evaluation practices](#). One of our biggest takeaways in the memo was related to our

participatory local strategy development process. Starting in 2018, local advisors in each of our places identified 1) Amplify Fund's grantmaking goals and 2) needed capacities to reach those goals. But, they did not collectively decide on a plan for monitoring progress on the goals or capacities. The result has been Amplify staff inconsistently collecting information about our places, and not being able to make broad statements about progress. In 2024 and 2025, as we refresh our grantmaking strategies with new local advisors, we plan to incorporate tailored, place-based, learning plans for progress monitoring.

If you are interested in digging deeper into our reflection report, or talking about equitable evaluation, reach out to me at renata@nfg.org. Or, join Amplify Fund's Funder Learning and Organizing Space!

Sincerely,

Renata Peralta

she/her

**Director of Learning & Communications,
Amplify Fund**



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 collaboration from Frontline 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.



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LESSONS LEARNED

EQUITABLE EVALUATION

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.

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