

FIVE EVALUATION DESIGN PRINCIPLES OF JUST PHILANTHROPY

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Building an evidence-based strategy that also centers on issues of racial equity is both art and science in philanthropy. For fourteen years, I have worked in philanthropy and tried to understand what can be done. I came to philanthropy as an educator who had worked for over a decade at the intersection of policy and practice. I also came as a student of innovation and design, with a penchant for wanting to identify an end user, gather insights, and understand motivations before jumping to solutions. I believe one must design for equity (especially in philanthropy); it is not inherent in the design process.

When we rely on quantitative evidence alone; when we ignore the experience and identified needs of those most proximate to the problem; when we prize rigor over practical application; and when we favor the machinations of philanthropy, government, and academia over what would be useful to those directly working on these problems, we are failing on equity. This is because equity requires listening to those directly affected and involved; understanding the why/how (qualitative) and not just the what (quantitative); prioritizing what is specifically helpful over what may be broadly true; and putting the needs of Black and brown people ahead of the needs of organizations and systems.

What does it mean to be successful in philanthropy (or policymaking), and whose success are we focused on? This essay wrestles with those questions and unpacks the role evidence has played in my own work, and it considers new ways of thinking about what role it might play in yours, through three projects (or acts) that I have engaged in over the last decade. Unfortunately, I won't be able to describe the richness of each project in detail, but I will illustrate how each project brought new opportunities and, ultimately, a set of design principles for me to apply in a "rinse, repeat, and relearn" way.

ACT ONE: TEACHER2TEACHER

Seven years ago, I was asked to take on a project to understand teacher narratives, networks, and needs.

Discovering the First Design Principle: Tailor Your Work for Your Partners and for Usability by Them

What was unusual about the work was the way in which we went about understanding teachers (using both a mix of qualitative and quantitative data) and what we did with that data. Ultimately, we used it to inform the development of a solution—a large online network. Teacher2Teacher, as the project still is called, was not predicated on using the network to scale a particular set of investments at the time. It truly was designed for teachers by teachers. We intentionally engaged teachers who were teaching Black and brown students and/or worked in vulnerable communities.

Uncovering the Second Design Principle: Center on Perspectives and Concerns of People Closest to the Problem

We had a key partner (teachers), but what did we know about them? We used traditional focus groups that told us teachers use social media and consume print and digital media in typical ways. We also heard them say: "Nobody knows teaching like teachers," and "We want to connect with our peers," and "We have no time to connect." We used narrative analytics, a process pioneered by Monitor 360 that combines big data and narrative analysis, to dig even deeper. From January to May 2014, we looked at over 2,400 blogs, 12,600 tweets, and 16,900 Edchats to get a sense of teachers' views of their work. This process surfaced ten key narratives—these narratives and the insights from our focus groups were then translated into a set

of guiding principles for our work and continue to be a core part of how the community is still run today.

A Third Design Principle: Take a Dynamic, Interactive, and Networked Approach

Building this massive teacher network was not easy. But we exceeded our engagement goals, and the community is now a healthy and engaged network of 1.8 million educators. Teacher2Teacher has done much more than surface new ideas and disseminate best practices. It also has served as an important way for us to get continual insights in real time. When the COVID crisis broke, Teacher2Teacher was able to give us weekly insights from teachers on what they were experiencing, what would be helpful, and how they were helping each other. We see the network as about building relationships versus making transactions.

We had taken a set of clear actions: identify a partner you seek to work with who is close to the problem and seek to understand their needs; gather insights on what they care about and use those insights to inform your strategy; and build relationships and support a network that would surface what they need and let that drive how one might best support them. This seemed like a more equitable way to go about developing and surfacing solutions at the time, but could we apply those lessons to other projects? What else might we learn (or relearn) using a rinse and repeat process?

ACT TWO: ADVANCING ACTIONABLE KNOWLEDGE

About three years ago, I was asked to launch a new grantmaking portfolio focused on the use of evidence. Our initial learning questions: *If we know what works in education, why don't educators use it? How might we scale knowledge of what works beyond the places where we invest?* While these questions are frequently asked by philanthropy and policymakers, workable solutions are elusive.

Applying the Design Principles

We followed roughly the same protocols as we had in Teacher2Teacher. First, identify the partner you seek to support and get input and insights from them by developing relationships and listening to their needs. After deliberations, we chose to focus on school leaders (principals and assistant principals). We used a combination of qualitative and quantitative insights

to understand and surface several insights about principal leader needs, networks, and behaviors.

One issue that emerged: improving attendance. What did the evidence base say about how to improve student attendance, and how might we share that with school leaders in ways that might optimize uptake?

We aggregated a community of over 35,000 school leaders online (known as the Principal Project) to get continued input and test our hypothesis about what would help them most. We found school leaders welcomed the connections and were eager to share their own knowledge about what works with others. When we tried to replicate this with other topics, we found that *the hard part was finding research and evidence-based practices that were actually usable or useful to their needs.*

Introducing a New Set of Problems with Evidence

There were four main reasons the evidence base was hard to find. First, the evidence base is often framed in ways that do not resonate with the problems practitioners face. For example, a principal might want to know how to develop deeper relationships in their school to reduce absenteeism, yet the evidence base is focused on dropout prevention programs. A related challenge we encountered was a mismatch between what researchers include in their published papers and what information practitioners actually want. Third, the format and distribution of the evidence base itself rarely acknowledged the busy lives of school leaders and the cadence of their day/week/year. Finally, there was a constant tension between what qualifies as evidence and how to include the modifications practitioners were making in real time to the evidence base given their local contexts.

Surfacing a Fourth Design Principle: Ask Explicitly about Equity and Make It a Condition of Success

We had identified the partner and gathered insights. We had started to build a network infrastructure to keep getting insights. But these challenges generated a new set of learning questions for us that began to reveal the importance of an equity orientation from the start. Our initial learning questions did not have an equity intention. We had framed the questions in a way that put the onus of change on the educator, and we defined success solely in terms of scale (adoption of practices).

Suddenly, we had another set of learning questions to address:

- What constitutes “evidence” and why does it seem so untimely or unhelpful to practitioners or needs expressed by families and students?
- Who is generating the evidence and how are those with lived experience influencing how the problems are framed?
- How, if at all, is the evidence base that already exists being used by those most proximate to the problem, and how is it reaching practitioners?

***The Fifth Design Principle: Question Who Gets to Define
Success and How It Is Measured***

Heather Krause of We All Count reminds me: *If you want to have an equity orientation, you have to ask two fundamental questions: Where is the onus to change, and what is the definition of success?*

Her questions prompted a fifth design principle that had yet to be addressed. We had to reassess what success looks like. Success often is defined narrowly in terms of scale (reach or adoption of practices) versus considering other aspects, including behavior change, relationship development, power dynamics, structural change, or other leading indicators of impact. In the end, we took a field building strategy and a view of success that included distributed networks and decentralized power, as well as policy change from the top.

Finally, success depends on setting internal targets related to your evidence and equity intentions. It is one thing to start on an equity journey and another thing to actually collect data and qualitative feedback on how well you are living your values. It may take additional effort or dollars to support organizations making shifts in their orientation, and it may mean seeking out new partners and partnerships. We are trying to move beyond the usual partners and set clear targets for engaging more organizations that have high levels of equity capacity and are run by leaders of color.

ACT THREE: ASSESSMENT AND ACCOUNTABILITY

About six months into the COVID pandemic, I was asked to launch a new opportunity area. Given the pause in standardized testing in both the K12 system and the SAT/ACT, the question was raised: What opportunity might this disruption bring? I began to think about how the five design principles summarized here might apply with this very different project that was

focused on policy reinvention and potential technical innovations: 1) Ask explicitly about equity and make it a condition of success; 2) Center on perspectives and concerns of people closest to the problem; 3) Tailor your work for your partners and for usability by them; 4) Take a dynamic, interactive, and networked approach, and, finally; 5) Question who gets to define success and how it is measured.

Ask Explicitly about Equity and Make It a Condition of Success

First and foremost, we started by asking an intentional question about equity. Lesson learned! We could have asked a general question as we conducted our research, such as: What was the impact of standards-based reform? Instead, we chose to ask questions in this way:

- **RQ1:** How and in what ways did standards-based assessment and accountability address structural inequities in the education system? What were the successes and challenges?
- **RQ2:** What were some of the unintended consequences (that is, negative impact) of standards-based assessment and accountability on schools and districts serving primarily Black, Latino, and students living in vulnerable communities? What pushback, if any, did standards-based assessment and accountability receive, and from whom?
- **RQ3:** Of the districts previously identified as low-performing or turnaround but are now demonstrating positive academic shifts for target students (Black, Latino, and those living in vulnerable communities), what actions were taken to address the unintended consequences of standards-based reform? Were equitable strategies and approaches used to address unintended consequences of standards-based reform? If so, what were the emerging results? What factors or conditions appear to be driving positive shifts?

We prioritized understanding the structural inequities and intentionally hired a team of diverse and equity-minded researchers to undertake the analysis.

Center on Perspectives and Concerns of People Closest to the Problem

As part of the assessment and accountability project, we conducted a landscape analysis, interviewed researchers and early architects of the

standards-based reform movement, and did a lookback internally at what we had invested in and why. This is where the fact base might have ended.

But we again chose to look further by finding partners who could give us deeper insights into how those closest to the problem experience the current assessment and accountability system. We intentionally included this learning question upfront as core to our strategy: What can we learn by listening to/acknowledging the voices/views of families, educators, and students most affected by standards-based assessment and accountability since it was initiated?

Question Who Gets to Define Success and How It Is Measured

As part of our insights work, we were trying to understand how students, educators, and family members define what success looks like for their children. We still are gathering insights as this chapter goes to publication. Success from my perspective will be to surface these insights in a way that helps inform the policy conversations to come.

A Work in Progress: The Emergence of a Sixth Design Principle

One issue that remains unresolved and emerged in the Advancing Actionable Knowledge work was about who holds power and in what form. In this new project, the issue surfaced through discussions about decision making power versus those who are most impacted by the current assessment accountability system. Perhaps as this work progresses, we will have to reckon more deeply with the power dynamics between funders and other stakeholders as well. A sixth design principle? The question remains. The journey continues.

TOWARD MORE JUST PHILANTHROPY

Equity will continue to be elusive if we dance around the edges of racism and power dynamics and fail to address these issues in our strategies, organizations, and systems. While I am not an equity expert, and have a long journey ahead to be sure, I have learned that the simple act of being intentional about racial equity as a goal, and expanding our notion of what constitutes evidence is a step in the right direction. I have made the case for improving a strategy's equity orientation by starting with a set of intentional design principles. This is a starting place for a much longer and more complex journey toward using evidence in ways that lead to what I call "more

just philanthropy.” Just philanthropy is a mindset and a way of approaching strategy development that involves engaging stakeholders in new ways and acknowledging that the solutions to the most wicked problems lie in the hearts and minds of those most proximate to the problem. It is a discovery process, not a solution, and I am still learning.