



# Foundations Share Approaches to Evaluating Racial Justice Work

by Soya Jung

To learn more about how foundations are evaluating racial justice work, Philanthropic Initiative for Racial Equity (PRE) convened a day-long discussion meeting of program officers and an informal conversation with funders from the Seattle region in 2009. As a consultant to PRE, author Soya Jung also reviewed written materials and conducted follow-up interviews (see Appendix) to develop this article.

Conversations with several foundation program officers whose institutions are designing racial justice evaluation methods show significant challenges in developing these methods, but also reveal commitment and potential for moving forward. Through these discussions, three critical components in evaluating racial justice efforts surfaced: shared racial justice language and definitions, a clear theory of change based on movement-building principles and a way to capture and disseminate the stories of racial justice.

None of the foundations that PRE consulted for this article had yet established a comprehensive evaluation approach for racial justice work, and few had fully adopted a structural understanding of race in the U.S. Still, all foundations were somewhere in the process of formulating racial justice evaluation methods and had important concerns and promising ideas to share. The most well-defined efforts have been explicitly grounded in structural racism language and definitions, and have yielded examples of how to understand, support and lift up strategies to uproot the underlying causes of racism.

## The Challenges

### What Do We Mean by Racial Justice?

Among foundations there is little agreement on what racial justice is and how to achieve it. For foundations committed to supporting racial justice work, this is perhaps the single greatest challenge for evaluating the impact of their racial justice grantmaking. Without consensus on what racial justice work is, the prospect of measuring progress becomes murky.

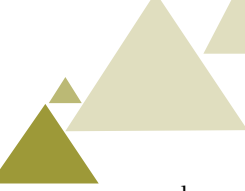
“Part of the challenge is defining racial justice,” said Jocelyn Sargent, program officer at the W.K. Kellogg Foundation. “How do you know when the work you’re supporting effectively contributes to racial justice? How do you know when you’re done?”

In order to define what racial justice is, foundations first need to establish a shared understanding of how race operates in the U.S. – one that takes into account how racism has been embedded into U.S. institutions, systems and culture such that its dimensions reach far beyond individual intent or behavior. This is particularly critical now, in an allegedly “post-racial” era when public discourse presumes that race no longer matters. But the reality is that within most foundations, staff members operate without a shared understanding of race, and hence, without common terms and definitions for talking about racism.

To help address this challenge, the Akonadi Foundation recently published *From the Roots: Building the Power of Communities of Color to Challenge Structural Racism*, which lays out the foundation’s basic understanding of the relationship between race and social change. The report states, “Real and lasting progress – in jobs, education, housing, immigration and health care – requires the rooting out of racism that is structured into every facet of American life. Without a conscious and sustained focus on structural racism, the impact of social justice will always be limited and short-lived.” The foundation’s view of how race operates in U.S. institutions, systems and culture assumes that no social change effort will be successful without an intentional focus on racism. This perspective is consistent across its programs, regardless of what issues a particular grant is addressing.

Melanie Cervantes, Akonadi program officer, offers this explanation of how the foundation defines racial justice:

Akonadi sees racial justice as the ability of communities that have been locked into segregated spaces to self-determine their futures, to have basic human rights in terms of food, housing, shelter, education, etc., and the ability to live in a way that is sustainable and healthy... Racial justice should not



only repair the damage that the legacy of racism has created, but should also dismantle the current structuring of racism in to our laws, policies and culture.

Using a structural racism lens allows funders to address the historical, cultural and systemic forces that hold racism in place. It involves the need to create new bases of power within communities of color, to build new relationships across institutions and sectors and to transform language and forge new cultural narratives to talk about race in the U.S.

However, such a structural understanding of race is rare in the foundation world. Most racial justice funders use a disparities- or equality-based approach to addressing racism. While these can yield useful and measurable results – for example, increasing high school graduation rates among students of color, or expanding civil rights protections – they can do so while falling short of achieving broader systemic change. This is because rather than questioning and transforming the systems and institutions that affect people’s lives, efforts to achieve equity or equality often presume that the logic behind these systems and institutions is sound, that one need only eliminate the barriers to equal access and opportunity.

### How Do We Measure Over the Long Term?

The challenge is that social justice organizations in general, and racial justice groups in particular, face slow, uphill battles on multiple fronts to achieve their goals, while being severely under-resourced. While evaluation tools in the nonprofit sector have proliferated, relatively few have been adopted by social or racial justice organizations.

Many see achievement of racial justice as inextricable from the building of broad social movements. “The big challenge in evaluating movement-building work is that there’s no formula for it,” Sargent says. “I think about the work in sociology that looked at how the civil rights movement happened. Scholars vary in their accounts of this story and about what components you add together to build a movement.”

Not all racial justice funders use a structural racism approach. And not all explicitly talk about movement building. However, most are clearly working toward some kind of long-term change.

At the Annie E. Casey Foundation (AECF), the emphasis is on eliminating racial disparities in particular systems – for example, reducing the overrepresentation of youth of color in juvenile detention. The foundation does not use movement building as an explicit racial justice strategy. However, it

recognizes that changing outcomes in areas like child welfare, health, criminal justice and education takes a long time. The work AECF has done to define a theory of change may offer useful lessons for movement-building organizations.

Program Officer Delia Carmen explained, “Seeing the needle move is a very long-term process. The big result that we’re aiming for is a target that’s hard to reach, because you’re dealing with years and years of inequity. Our challenge is coming up with measurements that would let us know that we’re going in the right direction, and allow us to see when we’ve turned the curve.”

AECF employs place-based strategies, involving investments into various institutions, issue areas and constituencies in given geographic areas over several years. Carmen explained that while it was challenging to evaluate progress in such a complex system, the foundation was able to at least create a framework for understanding how it expected change to take place.

“We came up with a theory of change frame that included many components, all of which were part of a large, complex system – the foundation’s Community Change initiative. We now have a very detailed diagram of all of the actors on the ground, the activities and interventions that were being initiated, and what results we were looking for from each component of the system,” she said. “Addressing racial disparities and structural racism was viewed as cutting across all components of the initiative. The frame also has a timeline for short-term, mid-term and ultimate result, which is that kids and families – primarily families of color – are doing better.”

Gauging progress on closing racial gaps in a given set of issue areas is one thing; to the extent that data is available, it is largely a matter of documenting measurable changes in indicators like employment rates or rates of incarceration. But measuring progress on eliminating or reducing structural racism is an entirely different animal. It requires an understanding of what movement building is and how to tell if it is taking place effectively.

Cervantes explained, “There hasn’t really been an effort to come up with shared markers to say, ‘These are the things we’re looking at in movement building’... although I really feel like it’s bubbling up. There are grantee partners that are talking about it and other foundations that are talking about it.” Akonadi embraces specific definitions of social movements and movement building, taken from the Movement Strategy Center, a San Francisco Bay Area-based intermediary

organization. However, it had never mapped out what its role was in relationship to movement building. What was the foundation doing and how was it contributing to the changes it wanted to see? Much like AECF, Akonadi realized that having a theory of change – a clear sense of what strategies were needed to achieve a set of outcomes – was essential for creating a sound evaluation approach.

Over the last year, Akonadi worked with a consultant to develop a graphic representation of its theory of change, beginning to articulate the contributions that the foundation and its grantee partners made, and the related immediate, interim and longer-term changes that it sought to achieve. These changes fall into three categories:

- ▲ Improvements in people’s lives, including the power of self-determination, the realization of expanded benefits from changed policies and practices, and fewer negative outcomes in areas like health, education, safety and opportunity.
- ▲ The reduction of structural racism, as illustrated by changes in cultural narratives, policies and practices such that systems and cultural representations promote racial equity, rather than create or maintain racial inequities.
- ▲ More people and organizations working effectively to elevate racial equity, to reduce structural racism and to promote racial justice, with sufficient infrastructure and resources to sustain racial justice efforts against resistance and retrenchment.

### How Are We Getting There? Showing Cause and Effect

Foundations often feel compelled to try to state definitively which interventions led to which outcomes. In the case of social change work, this is a particularly dubious exercise given the poorly controlled laboratory that is the real world.

The drive to identify causality may be rooted in a history of foundations using evaluation to determine what to fund – or more importantly, what not to fund. Some program officers argue that the inability to show how social change takes place is a key barrier to securing sufficient resources to support the work. However, Sargent argues for the need to let go of the desire to pin down causality altogether and to focus instead on creating the conditions that make social change more likely to take place.

“I think that causality is a problem,” she said. “There are several factors that we know, when combined together, are likely to produce an outcome. But there’s also a probability that it won’t happen and you just have to be prepared for

that. You want to improve the odds that a certain event will happen, and that’s the best you can do. You can’t cause it.”

### Going Beyond the Numbers

Still, there is a need to show how racial justice funders and practitioners are achieving impact – not only to argue for resources, but also to build more popular understanding of the value of racial justice.

Nicole Gallant, program officer at the Atlantic Philanthropies, said, “The question is how best to effectively communicate that a series of racial equity investments contributed to a desired outcome, whether through a causal or correlative lens.”

Within foundations, program officers often feel pressured to provide hard and compelling quantitative evidence to their boards that grantees are making a difference. Many trustees want to cut to the chase,” said Carmen. “They want to know more of the quantitative, and maybe some qualitative stories behind the data that we’re sharing. But for the most part, at their level, they want to know what are our targets and how are our results measuring up to those targets. They want a one-page document... ‘dashboards’ are the latest way that they want to see the data. We are still working on making the dashboards meaningful, because we know that our targets are long term.”

Numbers fail to tell the full story behind social change work. Beyond showing how many people secured quality, affordable housing in a given year, for example, social change advocates must illustrate a set of broad impacts that rely on a myriad of factors. For this reason, gathering convincing, real-life stories that paint a more holistic picture of racial justice work on the ground has surfaced as perhaps the most useful of evaluation tools.

At the Ford Foundation, Program Officer Todd Cox emphasized the importance of lifting up such stories, saying, “The challenge for those of us in the social justice and racial justice field is to make sure that we are appropriately qualitative in our analysis and assessment – no less rigorous, but appropriately qualitative – so that we don’t push grantees to being just bean-counters.”

In *From the Roots*, the Akonadi Foundation report that describes the foundation’s understanding of structural racism, there are examples of how foundations can help tell the stories of racial justice work. While the report is by no means a roadmap for evaluation, it does offer compelling accounts of efforts on the ground to address specific racial justice challenges and

opportunities. “Collectively, these stories inspire and also instruct,” the report states. “In them we find ‘raw material’ that can help to develop definitions of progress and impact that are both accurate and transformational.”

## Impact of Shrinking Resources

No matter what tools are used, general concerns about evaluation become amplified in the racial justice field because of how overworked and under-resourced organizations are. For example, conducting evaluation in order to reorganize funding priorities without consulting with grantees could be the death knell for racial justice groups without the capacity to communicate effectively about their work. Racial justice funders need to be particularly thoughtful about designing their evaluation processes in partnership with their grantees.

“One of the biggest challenges is thinking through why you’re doing evaluation, and being honest with yourself and with those you’re evaluating about what the goals are,” said Cox. “There can be mismanagement of expectations and I think that can be harmful... Everyone needs to start with the field. It’s important to include grantees in that conversation to help shape reasonable expectations, tools and outcomes that are aligned with reality.”

On a related note, Sargent cited the need to enhance the capacity of grantee organizations to do evaluation, so that they can help set the right expectations. “To the extent that the field is not able to help us with this, we’re not able to do it,” she said. “It’s great that we care about evaluation, but we’re really not going to understand what’s happening on the ground, until the people on the ground can help us understand that better.”

At Akonadi, the failing economy has brought looming concerns over the impact of evaluation on grantee organizations. “What is it going to take for this to be done in a manner that is actually helpful for everyone? Especially at this moment, I’m wondering what we’re going to ask of heavily impacted organizations in order to do this evaluation,” said Cervantes.

## Moving Forward: Fertile Ground for the Future

Several foundations are now grappling with these and other challenges in creating effective approaches to evaluating racial justice work, and their efforts will provide important lessons to build upon. Questions abound, not just about racial justice work in the field, but also related to grantmaking tools and procedures. How does a foundation use a structural understanding of race to craft an effective grantmaking program? How does it then evaluate the success

of its grantmaking – from its funding criteria to its grants management system?

“I want to know how the decisions we’re making, from beginning to end, are contributing toward the outcomes and impacts that we want to see,” said Cervantes.

As various foundations move forward in this work, coordination will become an important strategy for maximizing learning opportunities and minimizing negative impacts in the field. Sharing examples of promising tools, establishing a set of shared evaluation principles and creating standardized forms where appropriate will help foundations, informed by their grantees, assess and communicate the outcomes of their racial justice efforts, while minimizing the burden on an already stressed racial justice sector. At a minimum, foundations undertaking this work would do well to:

- ▲ initiate dialogues within their institutions to develop common language and a shared understanding of structural racism;
- ▲ encourage and support the use of narrative forms when evaluating structural racism projects;
- ▲ provide additional support to enhance grantees’ evaluation capacity; and
- ▲ collaborate with their colleagues in other foundations to create tools and materials that have enough standardization to streamline processes for racial justice organizations reporting to multiple funders for the same work, (but enough retain flexibility so that grantees can adapt the tools to their particular approach).

Soya Jung is a consultant for nonprofits and public interest projects, providing project management and organizational development services to local and national organizations. From 2001 to 2006 she was the grants and program director for the Social Justice Fund NW and played a key role in institutionalizing the foundation’s commitment to racial equity. Her field experience is in immigrant rights and grassroots journalism.