Moving the Needle towards Participant Ownership: Exploring Participatory Practices that Shift Power in Evaluation

Evaluation 24
Portland, OR
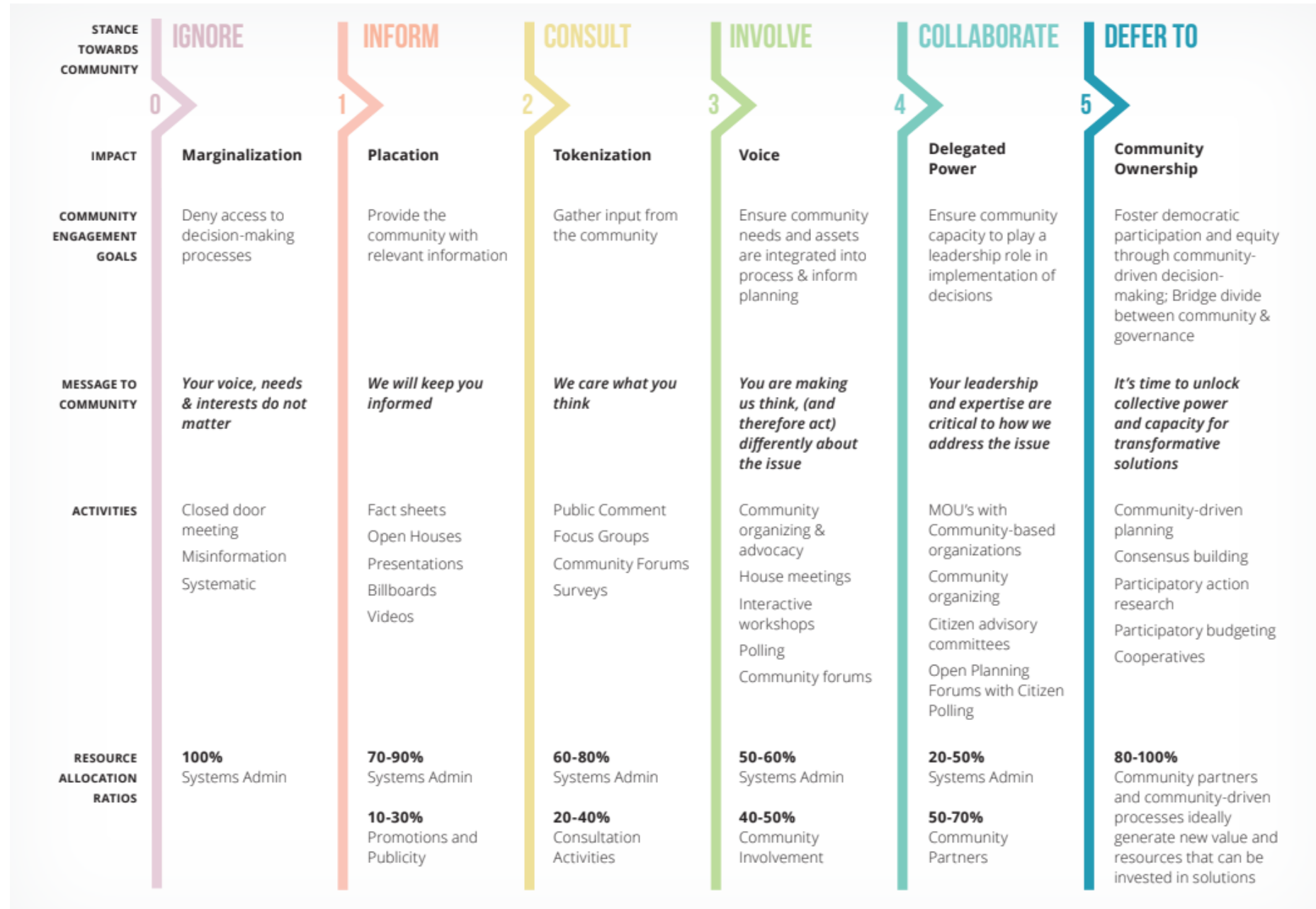October 23, 2024

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STANCE TOWARDS COMMUNITY	IGNORE	INFORM	CONSULT	INVOLVE	COLLABORATE	DEFER TO
	0	1	2	3	4	5
IMPACT	Marginalization	Placation	Tokenization	Voice	Delegated Power	Community Ownership
COMMUNITY ENGAGEMENT GOALS	Deny access to decision-making processes	Provide the community with relevant information	Gather input from the community	Ensure community needs and assets are integrated into process & inform planning	Ensure community capacity to play a leadership role in implementation of decisions	Foster democratic participation and equity through community-driven decision-making; Bridge divide between community & governance
MESSAGE TO COMMUNITY	*Your voice, needs & interests do not matter*	*We will keep you informed*	*We care what you think*	*You are making us think, (and therefore act) differently about the issue*	*Your leadership and expertise are critical to how we address the issue*	*It's time to unlock collective power and capacity for transformative solutions*
ACTIVITIES	Closed door meeting Misinformation Systematic	Fact sheets Open Houses Presentations Billboards Videos	Public Comment Focus Groups Community Forums Surveys	Community organizing & advocacy House meetings Interactive workshops Polling Community forums	MOU's with Community-based organizations Community organizing Citizen advisory committees Open Planning Forums with Citizen Polling	Community-driven planning Consensus building Participatory action research Participatory budgeting Cooperatives
RESOURCE ALLOCATION RATIOS	100% Systems Admin	70-90% Systems Admin 10-30% Promotions and Publicity	60-80% Systems Admin 20-40% Consultation Activities	50-60% Systems Admin 40-50% Community Involvement	20-50% Systems Admin 50-70% Community Partners	80-100% Community partners and community-driven processes ideally generate new value and resources that can be invested in solutions

Client-Developed Learning Agenda

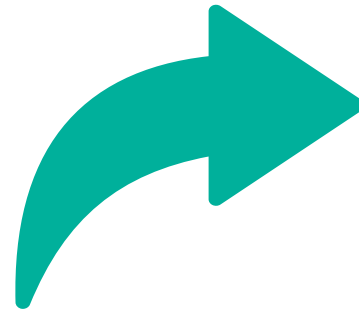# Project Description: Client-Developed Learning Agenda

National nonprofit working with policy advocates at state level

Year 1: Align their internal processes with new TOC

Year 2: Evaluate outcomes of the transition to the TOC

Jointly developed a learning agenda (between Y1 & Y2)

- IN created a template with guidance

- Client developed learning and evaluation questions

- We worked collaboratively to provide support and coaching around refining the questions

Who benefitted

Client:

1. Time to think as a team (i.e., without evaluators!)
2. Control over the questions
3. Iterative process with coaching/teaching
4. Preferred this to us proposing questions for them to react to
5. Defining terms created internal organizational clarity

Innovation Network:

1. Practice putting ourselves in the mindset of people who don't deal with learning and evaluation questions daily
2. Developing a template was clarifying for us
3. Coaching about what is feasible, and how to prioritize and focus questions
4. What ceding power and control over components we typically "own" can look like

Challenges
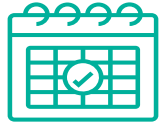
High level of effort

Lengthy template

Initial questions were all forward looking
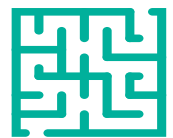
Final learning agenda felt overwhelming

What we learned

What conditions created challenges or success?

Success:

- First year of project built trust and relationships.
- Engaging in learning agenda work with client on another project strengthened their evaluative capacity.

Challenge:

- Balancing process, product, and expectations.

Did we create meaningful improvement and increase equity?

- Strengthened clients' knowledge and capacity for evaluation beyond our engagement.
- Client wants to go back to the Learning Agenda and see what questions they could explore next.
- The extent of full staff engagement in the process was not clear.
- We still "owned" the methods, so how much control did we give up?

Learning Circles

Project Description: Learning Circles

Regional funder focused on health and health equity

Funder supporting a cohort of grantees since 2017

Focus on non-partisan Integrated Voter Engagement

Wanted to move from funder-directed learning to participant-owned learning in 2021

- With grantees, landed on learning circles as the format

- Grantees wanted full scope of IN support to be co-facilitating learning circles

- Facilitated 4 learning circles

- Conducted a retrospective to make adjustments and learn from the initiative

Who benefitted

Client/Grantees:

Grantees:

- Co-creating space for peer learning and connection

- Bringing in outside speakers, data

- Long-term support

Funder:

- What ceding some power and control from the learning process can look like

- What knowledge and resources grantees want for their work

Innovation Network:

Evaluator:

- Balancing priorities of the funder and the grantees

- Co-creating spaces for peer learning and connection

- Moving from participation to ownership

Challenges

Capacity
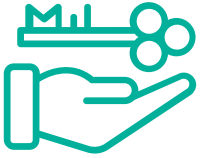
Full ownership vs. decision-making power

Power dynamics

Funder changes

What we learned

What conditions created challenges or success?

Success:

- Pre-established relationship with the funder and grantees through previous work.

- Opportunity to experiment and build learning circles over several years.

- Third party evaluator to facilitate process.

Challenge:

- Third party evaluator to facilitate process.

- Still operating in the bounds of philanthropy with its power dynamics between funder and grantee.

Did we create meaningful improvement and increase equity?

Maybe!

- Now have a lot of good information for a future attempt at participant ownership and learning circles.

- Grantees formed a separate initiative from the learning circles but originating through them in part.

- Shift in learning led to some shifts in strategy and grantmaking within the funder.

Evaluation Advisory Board

Project Description: Evaluation Advisory Board

Large foundation-funded grantmaking project: approximately 100 organizations across 22 states

EAC is like an evaluation Board of Directors

Recruited 10 individuals from grantee and subgrantees

Compensated either individuals or orgs at $250/hr

Intensive planning period: meeting six times over 4 months

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Project Description: Evaluation Advisory Board

We prioritize relationship, care, and trust building

We come in with our own clearly-defined agenda AND we solicit & plan around committee members' priorities

We provide multiple modes to communicate – chat, talking, pre-& post-meeting materials, Jamboard

We allow silence between comments, avoiding a sense of rush

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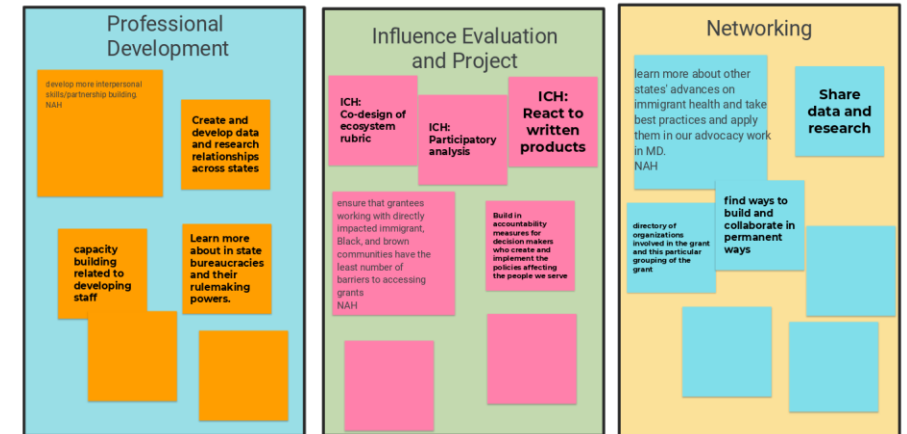
Who Benefitted

ICH and the evaluation

- Direct and regular contact with representative grantees
- Easily available participants for member-checking, piloting
- Validity and leverage for our findings

Committee Members

- Networking with each other, the funder, and the evaluators
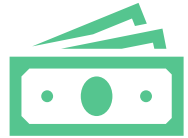- Exchanging ideas
- Solidarity and warmly supportive relationships

The Project overall

- Information and recommendations conveyed directly and anonymously to the project leadership

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Challenges

- Budget
- Capacity of grantees
- Representativeness critique
- Balancing structure vs responsiveness
- Not all the way to participant ownership

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What we learned

✉ Clear, consistent and organized communication is critical

🖥 Provide multiple ways to interact

♥ Prioritize building trust, care, and relationships among all members

🧘 Don't try to do too much – make space and time for deeper conversations

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Discussion!

- What are the necessary conditions for effective participant ownership? What other conditions besides the ones we mentioned are important? How can we increase positive conditions?

- What are good ways to balance meaningful relationship-building and respecting capacity limits?

- Should we always attempt to move it further towards ownership? Under what conditions is it not the best or most equitable strategy?

- What are the best ways to balance providing sufficient structure and ceding ownership?

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