



# THE WEIGHT OF POWER

The Role of Metrics & Evaluation at the Intersection of Social Justice

echoing  
green



# ACKNOWLEDGEMENTS

---

This report is part of Echoing Green's partnership with Robin Hood's Power Fund, which invests in outstanding nonprofit leaders of color who bring unique perspectives and expertise to the fight against poverty. The Power Fund aims to address longstanding funding disparities, both in Robin Hood's grant portfolio and in the philanthropic sector at large, by supporting a diverse cohort of social entrepreneurs and innovators who are at the helm of impactful nonprofit community-based organizations. We hope the research and stories featured in this report motivate all people to support Black social change leaders in new and expansive ways and see a place for themselves as active participants in creating and contributing to a just and equitable world.

## ECHOING GREEN

Cheryl L. Dorsey, President

Dabney Brice, Senior Research & Equity Associate, Thought Leadership

Liza Mueller, Vice President, Thought Leadership

Tiffany Thompson, Senior Director, Global Partnerships & Equity

## MICHIGAN PUBLIC HEALTH INSTITUTE (MPHI), CENTER FOR CULTURALLY RESPONSIVE ENGAGEMENT

Kantahyanee Murray, Ph.D., Senior Associate Director

Ashley Barnes, Research and Evaluation Manager

Blanca Flor Guillen-Woods, Evaluation Consultant

Martena Reed, Evaluation Consultant

Tracy Hilliard, Ph.D., Director

## EDITORIAL AND DESIGN TEAM

Dragonfly Editorial

KarBel Multimedia

Elliot Wright

## ADVISORY GROUP MEMBERS

Katrina Bledsoe, Principal, Abt Associates

Kara Bobroff, Executive Director, One Generation

Cathleen Clerkin, Senior Director of Research, Candid

Kendrick Davis, Associate Professor of Research, University of Southern California

Caroline Horste, Director of Operations & Strategy, BE MORE with Anu

Veronica Olazabal, Chief Impact and Evaluation Officer, BHP Foundation

Elizabeth Taylor-Schiro, Independent Research and Evaluation Consultant, ETS Consulting

Sean Thomas-Breitfeld, Co-Director, Building Movement Project

Howard Walters, Program and Evaluation Officer, W.K. Kellogg Foundation

## FUNDERS & COLLABORATORS

Robin Hood Foundation

Candid

---

This publication was produced at the request of Echoing Green. In partnership with Echoing Green, this research was led by the Center for Culturally Responsive Engagement (CCRE) at MPHI team, Kantahyanee Murray (project director), Blanca Flor Guillen-Woods, Ashley Barnes, Martena Reed, and Tracy Hilliard. CCRE and the Echoing Green team, Dabney Brice, Tiffany Thompson, and Liza Mueller, collaborated to write this publication.



2022 Echoing Green Fellows at Echoing Green Conference, Left to Right: Donte Miller, Grace Williams, Peter Okwoko, Kv Tjatjara, and Neo Huturi.

## ABOUT ECHOING GREEN

For 35 years, [Echoing Green](#) has been on the front lines of solving the world's biggest problems, raising up transformational leaders willing to speak truth to power and challenge the status quo. The organization funds emerging leaders with the best ideas for social innovation as early as possible and sets them on a path to lifelong impact. Echoing Green's community of nearly 1,000 social innovators includes past Fellows such as First Lady Michelle Obama and the founders of Teach For America, Center for Black Innovation, BlocPower, and One Acre Fund. Built and refined over three decades, Echoing Green discovers tomorrow's leaders today, and then funds, connects, and supports a new generation of social impact leaders.

## ABOUT CCRE AT MPHI

The [Center for Culturally Responsive Engagement \(CCRE\)](#) (CCRE) at MPHI is at the forefront of the movement to disrupt institutional and systemic inequities in philanthropy and other sectors. CCRE works to boldly address structural racism and racialized outcomes with partners across the globe, acknowledging the intersection of racism with other forms of oppression. The CCRE team brings a wealth of experience and expertise in culturally responsive research, evaluation, and strategic consulting in philanthropy and other sectors, with an emphasis on social innovation and leadership development. For more information about this project, contact Dr. Kantahyane Murray ([kmurray@mph.org](mailto:kmurray@mph.org)).

# TABLE OF CONTENTS

ACRONYMS & TERMS: THE POWER OF LANGUAGE .....	5
EXECUTIVE SUMMARY .....	7
I. Introduction .....	7
II. Methodology: Design, Methods, and Limitations .....	7
III. Key Findings .....	8
IV. Conclusion .....	8
V. Calls to Action and Recommendations .....	9
INTRODUCTION .....	10
METHODOLOGY: DESIGN, METHODS AND LIMITATIONS .....	12
KEY FINDINGS .....	15
I. Who Has the Power to Define Vision, Mission, and Metrics? .....	15
II. What Metrics are Collected and How Are They Used? .....	18
III. What Effect Do Metrics Have on BIPOC Leaders .....	20
IV. How Can We Create More Equitable Funding Streams? .....	22
IMPLICATIONS OF FINDINGS .....	24
CALLS TO ACTION .....	27
APPENDICES .....	33
Appendix I: Research Methods .....	34
Appendix II: Data Collection and Analysis Tools .....	35
Appendix III: Sources of Information .....	35
References .....	36

# ACRONYMS & TERMS

---

## The Power Of Language

### **GROUPS OF FOCUS IN THIS REPORT**

#### **BIPOC-Led**

The term BIPOC-led is a U.S.-centric acronym and refers to groups of people and organizations focused on, led by, and/or serving Black, Indigenous, and other people of color communities. In this report, we highlight BIPOC-led organizations. Many, but not all, of these organizations are smaller and have limited resources due to systemic funding disparities.

#### **Social Innovator**

A social innovator is an individual who brings deep knowledge and passion to designing solutions with and for their communities, who has defined a solution to a social problem that is more effective, efficient, sustainable, or just than existing solutions, and for which the value created accrues to society as a whole rather than individuals. In this report, many (but not all) of the nonprofit leaders who responded to surveys and participated in interviews are social innovators. In our findings, we will refer to this community as grant partners, as explained below, but we may refer specifically to social innovators when speaking broadly about the research, as their innovative solutions can be disproportionately impacted by traditional forms of metrics and evaluation.

## TERMS USED IN THIS REPORT

### Evaluation

Any systematic process to judge merit, worth or significance by combining evidence and values.

### Process evaluation

Examines the nature and quality of implementation of an intervention.

### Outcome and impact evaluation

Examines the results of an intervention. In this report, Program Monitoring examines quantity and quality of services, costs and short term outcomes.

### Data infrastructure

System for data collection, storage and analyses (Better Evaluation, 2022).

## TERMS NOT USED OR AVOIDED IN THIS REPORT

This report aims to use strengths-based, non-stigmatizing, and bias-free language. We aim to eliminate terms that replicate extractive and colonizing narratives and have outlined a few below.

### Stakeholder

We have avoided using the term stakeholder, which is particularly problematic for Indigenous peoples in the North American context. Rather than stakeholders, Indigenous peoples in North America are rights and title owners (Indigenous Corporate Training, 2017). This strengths-based framing is also present in other research contexts that challenge racial and class biases, which emphasize individual behaviors over institutional structures and systems (Valencia, 2010 and 2012).

### Grant Recipient

As recommended in the National Committee for Responsive Philanthropy's Power Moves guide, we have replaced grant recipient or grantee with grant partner as this term "challenges the top-down power dynamic that defines nonprofits primarily as recipients rather than as collaborators with their funders" (NCRP, 2018). Grant partners may be viewed as language that is more aspirational. However, we aim to change narratives and spur action that make the grant partner label more common. In some instances, the term "grantee" may be used in direct quotes from interview respondents. To maintain the integrity of these quotes, we did not replace grantee with grant partner.



*2019 Echoing Green Fellow Cielo María Holguín Ramirez, co-founder and co-director of Urban Oasis.*

### Capacity Building

Some social sector thought leaders have drawn attention to the top-down power dynamics implicit in the notion that funders have a role in nonprofit capacity "building." Instead, we center the agency of nonprofits and lean into non-paternalistic and decolonizing narratives regarding nonprofit needs for capacity-related resources. Where possible, we use the terms capacity strengthening or supporting organizational resilience as roles funders should play when resourcing capacity supports.

# EXECUTIVE SUMMARY

---

Dismantling and shifting power structures is key for achieving meaningful social impact. For far too long, funders have had significant control over social impact organizations: what they focus on, how they allocate resources, and how they measure their own success. This control contributes to ongoing inequity and impedes progress. If we want to bring about effective and lasting change, we need to shift that power to the people on the front lines — social innovation leaders and the communities they serve. Their voices need to be heard and respected. We must work together with them to develop solutions that make a meaningful difference. This report, a collaboration between Echoing Green and CCRE, seeks to contribute to those solutions by beginning to address two essential questions:

*Who has power to define success?*

*Who should have power to define success?*

Guided by this frame of reference, we conducted a review of existing literature, a series of **22 interviews**, and a **survey of 409 nonprofit leaders, social innovators, and philanthropic funders** to understand how philanthropy and social innovators measure success. We focused on the challenges faced specifically by Black, Indigenous, and people of color (BIPOC) leaders. Across these three methods, we sought to understand four key questions:

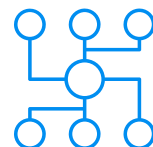
1. Who has power to define vision, mission, and metrics?
2. What metrics are collected and how are they used?
3. What effect do metrics have on BIPOC leaders?
4. How can we create more equitable funding streams?

## Our research revealed key findings on each question:



**Grant partners have power to define their organization's vision and mission, while funders have significant power to determine which metrics grant partners use.**

The ability of grant partner leaders to provide input, collaborate, or make independent decisions on metrics can depend on their relationships with foundation staff.



**Lack of data infrastructure and lack of evaluation staff or consultants are top challenges BIPOC leaders associate with metrics requested by funders.**

These challenges are intensified by funding terms that are too short to demonstrate impact, funders requesting metrics that do not accurately reflect the work, and burdensome reporting requirements.



**The most commonly reported metrics are for program monitoring, participant outcomes, and program outcomes, and how these data are used varies for grant partners and funders.**

Grant partners most frequently use these data for reporting to organization Boards of Directors and their funders. Funders most frequently use these data for tracking grant-related indicators and informing decision-making (e.g., resource allocation, grant partner selection).



**The most common strategies identified to create more equitable funding streams are:**

- Providing multiyear, flexible funding
- Streamlining reporting processes to reduce burdens on applicants and grant partners
- Increasing funding specifically for BIPOC leaders and leaders with lived experience
- Offering technical and financial support for data collection and management.

However, grant partners reported that funders rarely implement these strategies.

Our findings indicate that funders carry the weight of power in decision-making on which metrics grant partners collect, giving funders the ultimate power to define success. As a result, grant partners collect metrics in service to funders' needs. While grant partners are using some metrics for internal purposes, the effort put into collection does not produce strong enough results for them. Grant partners aspire to collect and use metrics to inform programmatic plans and communicate successes with their community members. Our research reveals that grant partner organizations and their leaders are well positioned to set the agenda on which metrics to collect.

The pivotal nature of relationships between grant partners and funders provides an opportunity for funders to leverage their power to create more equitable funding for BIPOC leaders in particular. Some grant partners reported that deeper relationships with funders can facilitate more simplified reporting,

revealing how relationships directly influence power dynamics. For BIPOC nonprofit leaders especially, relationships are most often described as positive when program officers are BIPOC. While diversifying the philanthropic workforce can help, the solution is more apparent: believe the grant partner.

Many reports, articles, roundtables, and networks have discussed the funder-grant partner relationship and provided recommendations for change. Our research leads to a question posed by an interviewee: Is it really a partner relationship? For this social impact leader, the answer is no. Instead, for him, it has felt more like an employee-employer relationship. If we want innovation to reach the people who need it most, and we are genuinely committed to reassessing funding programs that no longer work, he offers a plea to the field: redesign the current systems at play.



## CALLS TO ACTION

Our calls to action (CTA) and recommendations serve as a guide for funders, evaluators, and grant partners to foster a more inclusive approach to the use of metrics and evaluation. By implementing our recommendations, organizations can ensure that resources and support are channeled where most needed.

# 1

### Shift Power and Develop Transformative Relationships with Grant Partners

#### RECOMMENDATIONS

- Promote shared decision-making power and equity-focused evaluation.
- Adopt a learning mindset.

# 2

### Reassess Traditional Measures of Success and Progress

#### RECOMMENDATIONS

- Utilize metrics and evaluation for the good of the community first.
- Embed trust-based approaches to measures and evaluation by co-creating metrics, outcomes, and priorities with grant partners.
- Use culturally responsive and community-centered approaches.
- Identify and partner with equity-focused evaluation partners.

# 3

### Invest in Evaluation Innovation

#### RECOMMENDATIONS

- Put less emphasis on and invest fewer resources in quantifying or validating the impact of individual institutions, including your own.
- Provide grant partners with funding to build data infrastructure.
- Strengthen grant partners' evaluation capacity.

# 4

### Provide Flexible, Multiyear Funding

#### RECOMMENDATIONS

- Prioritize funding BIPOC-led organizations for the long term.
- Reduce reporting burden for grant partners.
- Collaborate with other funders to create more equitable funding ecosystems.

# INTRODUCTION

---

Who has power to define success, and how can that power be shifted so that BIPOC leaders are resourced to improve the health and well-being of their communities?

Dismantling and shifting power structures is crucial for achieving meaningful social impact. Power imbalances between funders and social impact organizations have perpetuated systemic inequities, hindering social progress for far too long.

When funders hold power to define success for social innovators, they intentionally or unintentionally shift the focus of social innovators' work and strategies to benefit philanthropy. When social innovators have power to design impact measurement tools and methods, they can implement culturally and linguistically responsive, community-centered solutions. The end goal is simple:

*Ensure BIPOC leaders are equitably resourced to improve the health and well-being of their communities.*

Only by doing so can we create a world where everyone has the opportunity to thrive.

In this report, Echoing Green, in partnership with CCRE at MPHI, is examining power and power imbalance around metrics and evaluation in philanthropy because addressing this imbalance could lead to more equitable funding for BIPOC social innovators.

**We reviewed existing literature on metrics and evaluation in the philanthropic and social innovation fields**, focusing on the challenges faced specifically by BIPOC leaders; conducted **22 interviews**; and collected survey submissions from more than **400 nonprofit leaders, social innovators, and philanthropic funders**. Across these three methods, we sought to understand four key questions:

1. Who has power to define vision, mission, and metrics?
2. What metrics are collected and how are they used?
3. What effect do metrics have on BIPOC leaders?
4. How can we create more equitable funding streams?

The urgency and complexity of today's social issues require thinking in new ways and acting immediately. If philanthropy genuinely aspires to create a more equitable and sustainable future, then this requires philanthropy to acknowledge and take action on the pressing need to shift power and place resources into the hands of social impact leaders who have historically been underfunded and excluded from exercising agency in the evaluation process.

*As you read this report, we hope you reflect on what is and the possibility of what could be.*



2016 Echoing Green Fellow Radwa Rostom and 2018 Echoing Green Fellow Aziz Alghunaim speaking at an Echoing Green Conference.

# METHODOLOGY

---

## Design and Methods

Below is a description of the research methods used for this project, which started with a literature review of 65 existing publications (peer-reviewed and gray literature) by authors inside and outside the philanthropic sector.

Topics focused on identifying existing trends, approaches, or findings of others who were interrogating the use of metrics in philanthropy, as well as the challenges and opportunities related to the use of metrics, particularly for BIPOC-led organizations. The findings from the literature review were used to help design this mixed method research project, informing the survey and interview protocols to collect additional information on how metrics are used and their impact in philanthropy and communities.




A total of 409 grant partners and funders completed surveys distributed by invitation, with a response rate of 1%. The first 100 participants received \$75 gift cards and all other participants were able to enter a drawing for \$250

Although the survey response rate was low, the findings were cross-referenced with the interview responses and the literature review to identify common

themes. The main research questions are listed in the table below, along with the methods used to explore the questions. (See Appendix I for further details on methodology, Appendix II for protocols, and Appendix III for sources of information.) We also conducted a second phase of interviews (two grant partners) to further illustrate the findings.

## RESEARCH QUESTIONS

## RESEARCH METHODS AND SAMPLE SIZES

<p><b>Who has the power to define vision, mission &amp; metrics?</b></p>			
<p><b>What metrics are collected &amp; how are they used?</b></p>		 <p><b>INTERVIEWS</b></p> <p><b>12</b> grant partners</p>	 <p><b>SURVEYS</b></p> <p><b>366</b> grant partners</p>
<p><b>What effect do metrics have on BIPOC Leaders?</b></p>	<p><b>LITERATURE REVIEW</b></p> <p><b>65</b> articles</p>	<p><b>10</b> funders</p>	<p><b>43</b> funders</p>
<p><b>How can we create more equitable funding streams?</b></p>	<p><a href="#">Literature review report</a></p>	<p><a href="#">Grant partners protocol</a></p> <p><a href="#">Funders protocol</a></p>	<p><a href="#">Survey questions</a></p> <p><a href="#">Grant Partner Data</a></p> <p><a href="#">Funder Data</a></p>

**Background on our survey participants:** Among grant partners who completed the survey, **55% had annual budgets of less than \$500,000, 59% provided services locally, and 35% had boards with majority BIPOC membership.** The chart below shows to what extent BIPOC communities are included by grant partners.

**A majority of grant partners report that they serve BIPOC communities and almost half are BIPOC-led (N=345).**

Serving BIPOC community



BIPOC-led (leader or 50% of senior leadership)



Mission or aim is to serve BIPOC communities



Founded by BIPOC leader



Other



*\* Organizations were able to select all descriptors below that apply*

Grant partners and funders who completed the survey most commonly report education and health and healthcare as program or issue areas they address.



*(Top) 2023 Echoing Green Fellow Ali Anderson, Founder of Feed Black Futures, delivers fresh produce.*

*(Left) 2019 Echoing Green Fellow Julia Kumari, Founder of ISeeChange, co-hosts a live storytelling event.*

## KEY FINDINGS

---

### I. Who Has The Power to Define Vision, Mission, And Metrics?

The National Committee for Responsive Philanthropy defines power as the funder's ability to "set the rules and control access to resources, information, social networks, and decision-making" (NCRP, 2018). Both grant partners and funders have power to advance change. But power imbalances emerge and persist when funders dominate decision-making or act in other ways that diminish grant partners' and communities' voices and agency in creating solutions.

When we spoke with grant partners, they shared that their senior leadership usually creates the vision and mission, setting the destination and the course for the organization. At times, co-founders and communities that organizations serve contribute to the mission and vision.



The four of us who co-founded ASAP originally set the vision and goals, based on the [asylum seeker] crisis we observed. But our vision and goals have shifted enormously over time, in response to what our members have told us they want. Today, our members and their collective preferences are the main driver determining our vision and goals. And then it is our job to adopt their vision and do everything we can to achieve their goals.”

— **Swapna Reddy**,  
Asylum Seeker Advocacy Project (ASAP)



2023 Echoing Green Fellow Atim Mbah (second from left), Founder of Green Farmlands, poses with farmers.

When asked about metrics and evaluation, grant partners reported that related efforts were intrinsically tied to their core missions by centering their data collection around the well-being of their communities, respecting data sovereignty, and engaging in holistic evaluation processes. However, they also reported that evaluation metrics are often selected with input from their funders.

One grant partner we spoke with described a competitive process to secure a grant for an unknown amount. The organization had spent years developing evaluation methods to link a culturally competent disease reduction program to key indicators of health. An exchange during the final interview illustrates how this power dynamic — between those who control a resource and those who value or need that resource — can deeply influence the vision and metrics for an organization. “After my pitch, the interviewer asked me about the outcomes. I spoke about our mirror evaluation, the whole evaluation process, and our outcomes, as well as how important it is that these outcomes are culturally relevant and competent for our participants. And right away the interviewer said, ‘These are not outcomes that I as a donor would like to repeat with you. What

is your rate of disease reduction? What are your nationwide outcomes?’ I felt so defeated. I could not feel a connection to or empathy from this [funder] in front of me, this person who has a different power than me. Not bad intentions, but different power... on the plane [home] all I could think was that maybe I am going after the wrong things.”

“

I felt so defeated. I could not feel a connection to or empathy from the person in front of me, this person [funder] who has a different power than me. Not bad intentions, but different power... on the plane [home] all I could think was that maybe I am going after the wrong things.”





*(Top) 2020 Echoing Green Fellow Ruchi Varma and 2022 Echoing Green Fellows Bernadette Lim and Hemakshi Meghani take a photo.*

*(Right) 2022 Echoing Green Fellow Elizer Darris speaking at an Echoing Green Conference.*



Both funder and potential grant partner shared a common goal of reducing disease incidence. But the funder's prescribed vision — influenced by their own power and positioning — hindered shared understanding, cultural competency, and knowledge of what is necessary to create change, stifling innovation and growth.

In our research, when grant partners described their relationships with funders as flexible and amicable, they had more opportunities to define their own metrics. These funders were usually willing to accept organizations' existing metrics for grant-reporting purposes. Representation — especially race and ethnicity — also matters here. **According to the Council on Foundations, 86% of CEOs and 69% of full-time foundation staff are white** (Council on Foundations, 2022). Given the demographics of philanthropic staff, BIPOC leaders face additional barriers to building strong, trusting relationships. The perspective of funders, who decide on the allocation of resources and metrics for organizations led by and serving people of color, may not be fully informed by lived experiences and community members. They also may not have direct relationships with BIPOC leaders. In light of the pervasiveness of racially homogenous social and professional networks, BIPOC leaders are less likely to have existing connections and relationships with foundation staff.

Some funders recognize the deep power imbalances and are changing their practices and influencing others to do the same. As one shared:

“

The funders that I think do the best work are the ones that come to it with true humility and that it's okay to make mistakes. It's okay to not know what you're doing, but you can reach out and still build good, meaningful relationships and partnerships to try to do the best you can.”

— **Erik Stegman,**  
Native Americans in Philanthropy

## II. What Metrics Are Collected And How Are They Used?

Collecting metrics is crucial for evaluating the effectiveness and impact of both individual programs and entire organizations. Program monitoring uses metrics to provide information on progress towards goals and help shape activities in an ongoing way. In our survey, **80% of grant partners and funders stated the importance of collecting metrics for these purposes.** Interviewees shared some topics of data collected for metrics: program reach and engagement, attitude and behavior change, economic mobility, and health-related outcomes.

### EXAMPLES OF METRICS COLLECTED BY GRANT PARTNERS AND FUNDERS

- **Program Reach and Engagement:** The organization uses output data to gauge the extent and reach of its activities, such as the number of activities hosted, meetings conducted, and people connected. This helps in understanding the overall engagement and direct impact of the organization's initiatives.
- **Attitude and Behavior Change:** Metrics are also used to track shifts in attitudes, behaviors, and perceptions over time. This indicates the organization's influence on individuals' mindsets, actions, and views (e.g., their perceived access to opportunities).
- **Economic Mobility and Health Metrics:** The organization measures outcomes related to economic mobility and health, such as job placements, wage growth, and access to healthcare. These metrics reflect the tangible benefits the programs have on individuals and communities.

This kind of data allows organizations to assess the progress and success of their programs, identify areas of improvement, and demonstrate accountability to boards, funders, and communities. One foundation we interviewed engages in ongoing monitoring and annual reflections to understand how change happens among grant partners and to make informed decisions in a dynamic context.



We're making every effort to avoid asking our grantee partners for information that satisfies our curiosities, and instead focus on information that helps all of us learn about how social change happens."

— **Large Global Funder**



*2019 Echoing Green Fellow Antoine Patton, Founder and Executive Director of Photo Patch Foundation.*

This funder emphasized their need to understand the external context in which grant partners' programs operate, tracking progress and collecting data aligned with the changes they aim to support. They avoid grant-by-grant evaluations and instead conduct strategy or portfolio-level evaluations, which supports the funder's needs for insights and learning.

This change also shifts some of the accountability for progress and success to the foundation. Evaluation data is used strategically to help the funder make adjustments to strategy implementation, be better grant makers, and support their partners in the field.



The data that we collect relative to evaluations are really centered first around what was our theory for how change would happen? What did we do? And how did we support our grantee partners?"

— **Large Global Funder**

When determining which evaluation metrics to collect, the top consideration for grant partners is their organization's vision and mission. Among the funders we surveyed, their top priority was to make reporting less of a burden. (See Appendix II for full funder charts.)

However, the data they prioritize and the way they use it can differ. Ninety percent of grant partners have used data to report to their Boards of Directors, and 87% have used it to report to their funders in the last year. Funders primarily use the data to track metrics related to the grants they've issued and to make decisions about how to allocate resources. This is especially true when they're selecting which grant partners to support, which sometimes results in BIPOC-led organizations receiving grant funds.

This research tells us that grant partners who are part of the communities they support are using data for accountability to funders and boards, the majority of whom are not from, in, or deeply connected to the community. Metrics are being used to offer proof of worth and progress to outsiders, not to hold them accountable to the health, well-being, and sustainability of the communities who have been systematically marginalized.



*2023 Echoing Green Fellow Francesca Raelison, Founder of Omena, Inc., engaging with participants.*



One of our challenges is that some funders are all over the place about the kind of data they care about. They are trying to figure out who they want to influence and for what reason. However, we have other funders who care about our community priorities. They aren't trying to dictate the kinds of data they want us to use. These funders are often themselves investing in evidence spaces that are directed by the community."

— **Dr. Dorian Burton**  
Southern Reconstruction Fund

### III. What Effect Do Metrics Have On BIPOC Leaders?

**Over 60% of grant partners who completed the survey reported that limited data and evaluation capacity is a common challenge for their organizations.** Specifically, data infrastructure and access to evaluation staff or consultants (see section D in the survey results for a list of challenges). Overall, grant partners with BIPOC leaders reported more challenges, and interviewees stated that the burden of reporting can be intensified for BIPOC leaders due to limited resources to allocate towards extensive reporting. One grant partner we interviewed grappled with capturing data that could accurately depict their organization's core activities — community building and curating grant partner connections. This challenge was not for a lack of evidence but an internal challenge of distilling the essence of their work into a theory of action and then deciding how that theory of action could be used to motivate investments.



[Funders] mostly care about numbers with one or two stories to back them up. We have shifted some of our trackers based on funder requests to have more details on what they are interested in tracking. Usually, they ask helpful questions to improve our program, but tracking it is a lot of work. We don't have the capacity, and funders don't offer evaluation support."

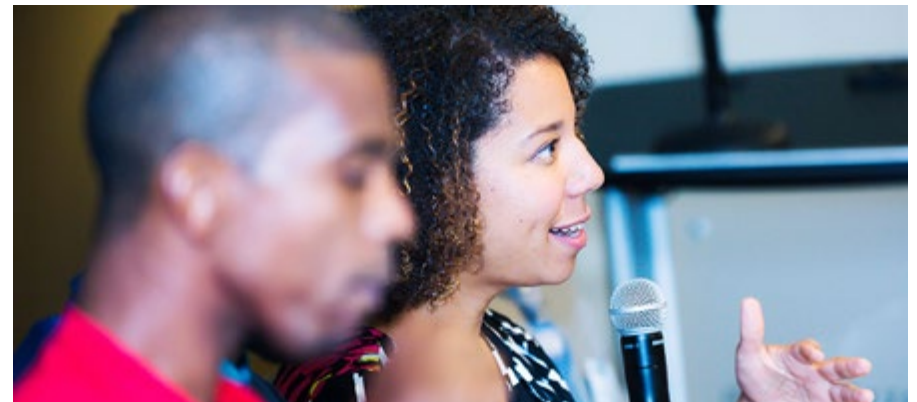
— **Reyna Montoya**  
Aliento

This grant partner's experience highlights a stark disconnect between the expectations of funders and grant partners' needs.

Limited evaluation capacity is a key barrier for collecting and reporting on metrics. The high frequency of respondents who indicated a lack of technical assistance suggests that organizational capacity is a challenge more broadly. In interviews, funders and grant partners highlighted challenges that further illuminated these barriers. Unsurprisingly given their resource constraints, grant partners cited these challenges more often than funders.

#### EXAMPLES OF EVALUATION CHALLENGES

- **Capacity and Competence Gaps:** Some organizations described a lack of capacity to develop metrics and collect data. This lack was related to balancing their primary mission-related work with data collection work and to having both adequate data collection and management systems in place and staff time and expertise. Some funders described ways to address this challenge, such as funding evaluation capacity strengthening efforts, funding data-related positions, and having minimal reporting requirements.
- **Burden of Reporting Requirements:** Reporting requirements imposed by funders can be strenuous and burdensome. This burden may disproportionately affect organizations serving marginalized communities, as they may have limited resources to allocate to extensive reporting processes.
- **Data Quality and Demographic Data Collection:** Funders and grant partner interviewees expressed concerns about the quality and accuracy of data collected, particularly in relation to race and ethnicity. Multiple respondents highlighted the need for better data collection methods and the importance of self-reporting of demographic data by participants. Interviewees perceived accurate demographic data as an important early step to understanding the needs and assets of communities being served and to addressing disparities.



2017 Echoing Green Fellow Amanda Alexander speaking on a panel at an Echoing Green Summit.



(Top) 2020 Echoing Green Fellows Xavier Henderson, Ruchi Varma, Shanté Elliot, and Taylor Toynes.

(Right) 2017 Echoing Green Fellow Reyna Montoya, Founder and Executive Director of Aliento.



“

It's not just the data but having the capacity and expertise to analyze it. Now that we're scaling, it would be nice to have tools to see the data, to check 'is this accurate, is it in alignment with what you're seeing?' We don't have an evaluation team or software. We're collecting a lot of data to help us improve our programming, but don't have the capacity to do the level of analysis [needed] to look at [it], [we're] also sensitive about having data in a system around our vulnerable populations. Also how do we present the data to outsiders (people not in the community who lack the cultural context)? Having a system that allows you to analyze the data to decrease confirmation bias and [that] can integrate the cultural context. Who's investing in that? I haven't found anyone.”

— **Reyna Montoya**  
Aliento

Time is an important factor feeding into how social innovators experience these challenges. It takes time to build relationships that lead to new and sustained funding. Similarly, it takes time for an organization to build a strong data and evaluation infrastructure and time to refine and leverage a strong data model to demonstrate impact.

***A one-time investment is inadequate to ensure a strong data and evaluation infrastructure.***

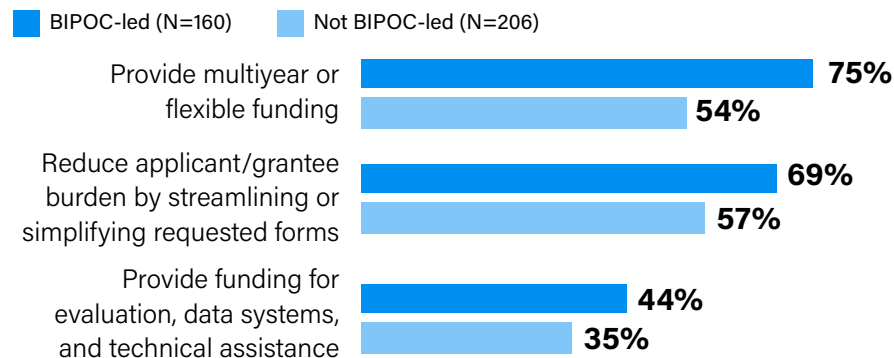
**In our survey, 57% of grant partners reported not having enough time to demonstrate impact. Unrealistic expectations set against short grant terms. Fifty-two percent of grant partners indicated they are being asked to report on metrics that do not accurately reflect their organization's work.** This means they must spend a great deal of time — with limited capacity — to measure things that don't matter to them or don't reflect the true impact of what they're doing in real time.

## IV. How Can We Create More Equitable Funding Streams?

Centering BIPOC leaders and resourcing their initiatives is a pathway towards creating lasting impact and advancing equity in philanthropy. BIPOC leaders have an important role to play in co-creating solutions with and for their communities. Funding these leaders equitably can provide them with access to data and evaluation capacity to tell their own story of progress, validate their solutions, and ultimately shift the social change paradigm to be led by those closest to the issues and to the solutions.

Both grant partners and funders identified the same top strategies to create more equitable funding streams: providing multiyear or flexible funding and making the reporting process simpler and more straightforward for those applying for and receiving grants. As illustrated in the chart below, grant partners of BIPOC-led organizations were more likely to endorse these top strategies than those of non-BIPOC-led organizations. Another top strategy identified by grant partners was providing funding for evaluation and metrics. In interviews, grant partners and funders went further. In addition to funding, they also suggested support for gathering and managing data and discrete technical assistance.

### Strategies grant partners identified as most effective at creating more equitable funding for Black, Indigenous, and leaders of color (N=366)



\*Grant partners were asked to select the top five strategies most effective from a list of 14 total. See Section E in the grant partner survey results for the full chart.

\*Multiyear, though not defined in the survey, is generally accepted to mean guaranteed funding for two or more years.

Grantmakers for Effective Organizations' 2022 report, "Centering Equity Through Flexible Reliable Funding," concluded that, "As our sector seeks to become more equitable and to share, and even cede power, a shift to flexible, reliable funding can catalyze transformative, rather than transactional, relationships between grantmakers and nonprofits, ones that are rooted in trust."

Both funders and grant partners emphasized that flexible funding, like general operating funds, could help relieve the burden of reporting — as long as grant partners are able to establish their own goals and use the funds to support those self-determined goals. This flexibility requires a trust-based relationship. Funders can also support innovation by giving grant partners the freedom to set their own goals and use funds in ways they see fit. One of our project advisors highlighted how this freedom can spark creativity in tackling issues and allow them to make changes along the way as needed. One grant partner shared how flexible funding combined with multiyear funding advances sustainability and, ultimately, the community's success:



Equitable funding is general operating, that's one. And funding that is multiyear. I mean five to 10 years multiyear, not two or three. Funding that works with us to get more funding to build on it, to help with sustainability, and funding that is flexible. We want community members that we work with to have self-sustaining funding, some sort of an economic engine for them. Finding a way that helps us to do that really well so that the community will also be successful is key."

— **Dominica McBride**,  
PhD, BECOME

While many funders we spoke with said they use these equitable funding strategies, we observed that not many are supporting grant partners' capacity to collect and manage data, even though it's a top strategy identified — especially by BIPOC-led organizations. Funders instead focused on trying to minimize new data collection requests.

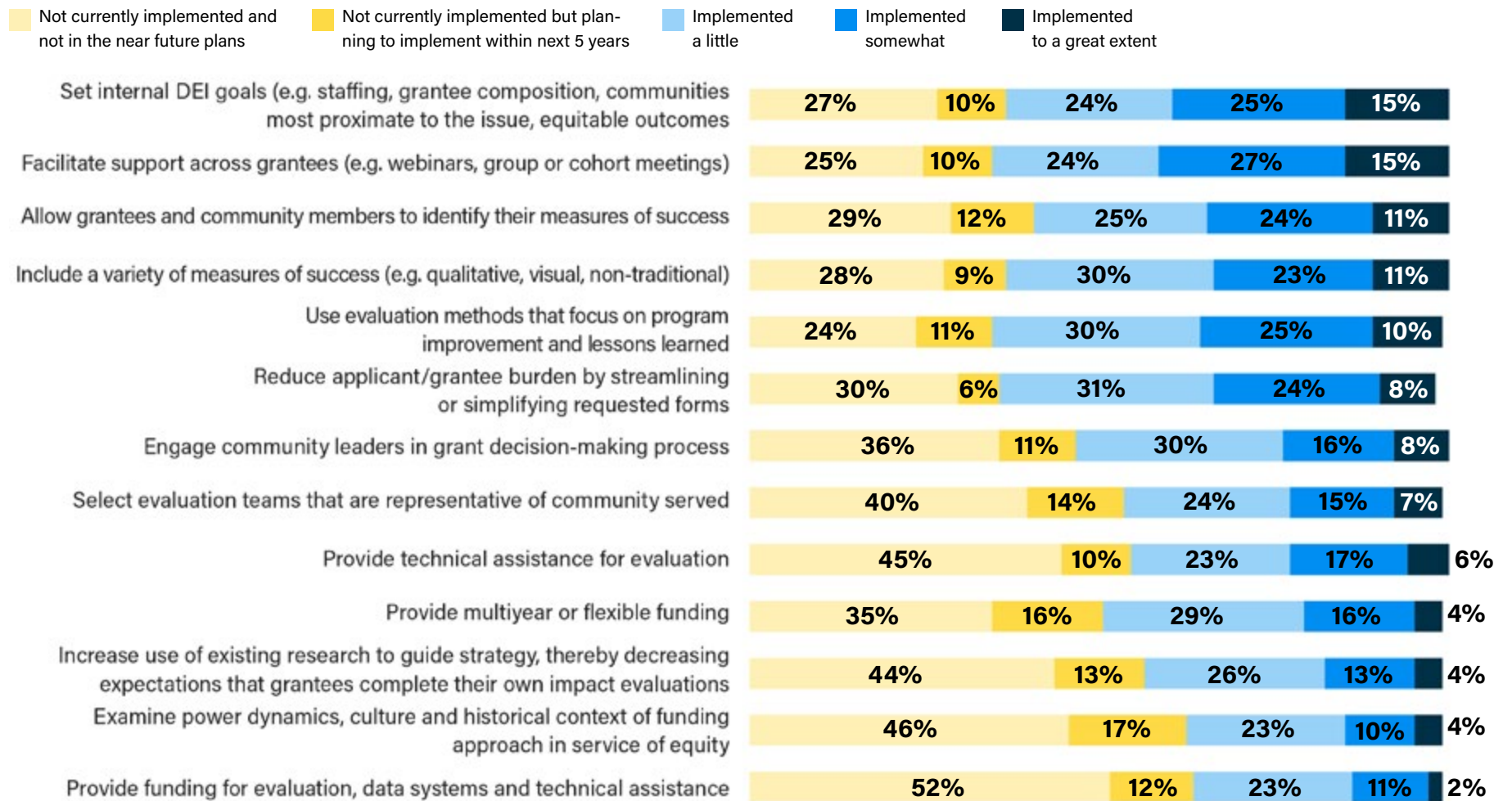
Grant partners hold valuable insights and strategies for creating more equitable funding. Despite the current gap between these recommended approaches and their actual implementation (see chart below), funders have a growing awareness of the importance of equity in their practices.

For example, some funders set internal DEI goals and provide support across grant partners through webinars and group or cohort meetings.

These practices can lay the foundation for expanding more transformative equitable funding, particularly providing multiyear flexible support.

According to the Center for Effective Philanthropy Grantee Perception Report, only 41% of respondents received multiyear general operating support during the year before the COVID-19 pandemic. Most recent available data from Candid in 2019 indicates that 23% of grant dollars funded by U.S. private and community foundations in the prior 10 years were in general operating support. More recent data following the COVID-19 pandemic suggest only a slight increase, with 30% of grant partners reporting receiving unrestricted funding. However, to truly advance equity in funding, funders must continue to actively listen to grant partners and work collaboratively to build a more inclusive philanthropic landscape.

### Extent to which funders apply the following practices in current partnerships, reported by grant partners (N=344)



# IMPLICATIONS OF FINDINGS

---

Who has power to define success, and how can that power be leveraged so leaders of color are well-resourced?

Our exploration of this question gives us a simple answer:

*Grant partners and funders have power, but the weight of power among funders is hampering progress and change.*

A funder's ability to decide what metrics a grant partner should collect has historically given them the ultimate power to define success. This power minimizes grant partners' ability to exercise their agency in use of metrics and evaluation and leaves out a critical voice: **the communities that grant partners work with and for.**

The use of metrics and evaluation must start with a **mutual understanding** between grant partners, evaluators, and funders. Our research reveals that grant partners collect metrics in service to funders' needs (e.g., program budgets and community demographics) for grant proposals or external reports. While grant partners are using some metrics for internal purposes, the effort put into collection does not produce strong enough results for grant partners. They aspire to collect and use metrics to inform programmatic plans and communicate successes with their community members.



Funders can best support grant partners by embracing flexibility in metrics and evaluation, dramatically altering their grantmaking processes and their relationships with grant partners. In relationships with these institutions, grant partners feel empowered to design and collect metrics aligned with their organization's vision, mission, and community needs. Funders can shift their focus from monitoring grant partners and proving their own institutional progress to seeking broader learnings for the field across grant partners, portfolios, and funding networks. The authors of the 2022 article "[Measuring is an Act of Power](#)" concluded, "Centering equity in evaluation requires a shift from the status quo and an emphasis on innovation to expand helpful tools that exist and develop new measurement frameworks." For funders, the road to equity in metrics and evaluation is clear: **shift power and develop transformative relationships with grant partners; reassess traditional measures of success and progress; invest in evaluation innovation; and provide flexible, multiyear funding.**

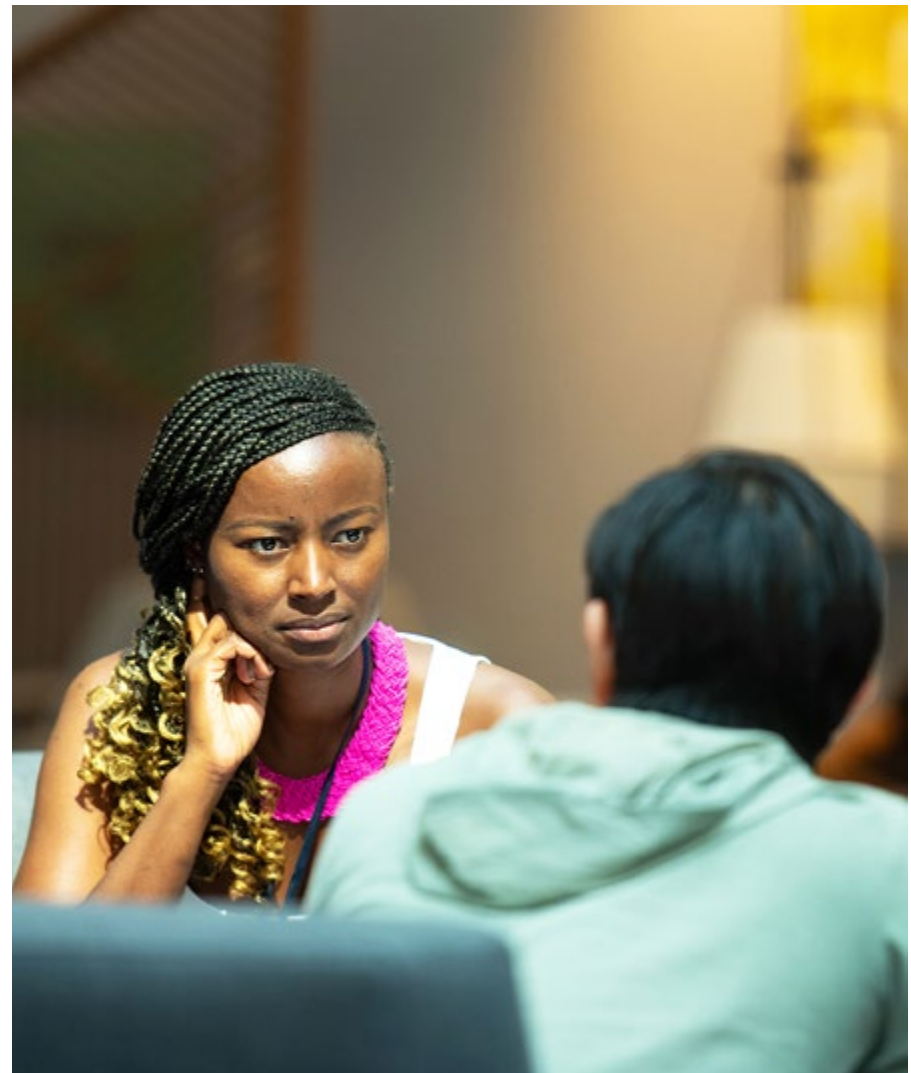
Many reports, articles, roundtables, and networks have discussed and provided recommendations on the funder-grant partner relationship. **So what's different now?** For us, it's a question posed by an interviewee: *Is it really a partnership?* For this leader, the answer is no. Instead, for him, it has felt more like an employee-employer relationship.

If we want innovation to reach the people who need it most and are genuinely committed to reassessing funding programs that no longer work, grant partners offer a plea to the field: **redesign the current systems at play.**

To redesign means first acknowledging what has historically existed. Our research gives us hope that change is within reach. BIPOC survey respondents who experienced positive relationships with their funders experienced flexibility regarding metrics. Positive relationships were most present when program officers were also BIPOC. While diversifying the philanthropic workforce is a significant first step, the answer is more fundamental than that: **believe the grant partner.**

Our research, and much before it, reveals that grant partner organizations and their leaders are well-positioned to set the agenda on what metrics to collect and how to learn about the progress, outcomes, and successes in their work.

Looking ahead, we know that as a society we've been led to believe that thinking and acting differently is risky. But BIPOC leaders have always lived in the realm of what "different" looks like. Rather than focusing on what we might lose if we continue to stick to archaic philanthropic tradition, let's join them on this journey of possibility by embracing different ways of thinking and recognizing all we could gain.



2022 Echoing Green Fellow *Ciro Muiruri* in conversation.

We embarked on this research hoping that by interrogating power, the philanthropic sector will see the opportunity in rethinking its values regarding metrics and evaluation. As one grant partner shared, "so many organizations are data rich, but information poor," and evaluation can either be a "tool for liberation or a weapon of mass destruction." These insights reinforce the urgency for transformative change and demonstrate the potential for data to become a powerful force for equity and justice.



As Yeshi Milner, Echoing Green Fellow and co-founder of Data for Black Lives, often says:



We believe data must be reclaimed and reimagined.

Data is protest.

Data is accountability.

Data is action.”

# CALLS TO ACTION

---

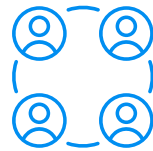
In moving towards meaningful change, it is crucial to shift our approach and embrace new ways of working. Instead of relying solely on existing structures and frameworks, we must cultivate a trust-based openness to alternative approaches. This requires relinquishing the need for funding institutions to assert ownership over outcomes and visions. The following calls to action (CTAs) aim to provide the broader field with tangible steps to foster a more equitable approach to metrics and evaluation.



## CALL TO ACTION

---

# Shift power and develop transformative relationships with grant partners.



**Promote shared decision-making power and equity-focused evaluation.** Prioritize equity and actively involve grant partners in shaping funding strategies, program design, and evaluation frameworks.



**Adopt a learning mindset.** Create spaces for honest, open, and transparent dialogue, ensuring grant partners and community members are heard and valued in decision-making processes and are compensated for funder education or advisory work that they engage in. Shift resources from single grant partner evaluations to field-level study that offers greater cross-organizational insight for the field, enhancing the collective body of knowledge on culturally relevant, community-informed solutions.

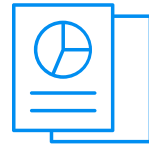


**Note for evaluators:** Recognize and address power imbalances by acknowledging evaluators' relationships, knowledge, positionality, and privileges. Actively leverage evaluator power to promote mutuality and empower BIPOC leaders and communities. Support grant partners in navigating challenges such as time constraints and data collection issues, advocating for alternative approaches to shift power dynamics. Support funders to examine their practices and refuse to perpetuate harmful practices that disproportionately prioritize the needs of a funding institution over the needs of communities.

# 2

## CALL TO ACTION

# Reassess traditional measures of success and progress.



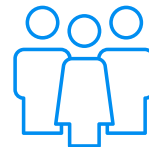
### **Utilize metrics and evaluation for the good of the community**

**first.** Interrogate the perspective from which you are measuring and the rationale for measurement. Is that perspective from a seat of power? Is the rationale to provide validation to an audience with more power and influence? Assess and implement measurement strategies that shift accountability to those with resources and offer benefit to those with fewer resources.



### **Embed trust-based approaches to measures and evaluation by co-creating metrics, outcomes, and priorities with grant partners.**

Involve grant partners in the process of developing metrics, ensuring their perspectives, expertise, and community knowledge are valued and integrated. Support grant partners that have not been able to invest in measurement with fast, upfront funding and technical support to engage in defining measures of success. Go beyond offering a metrics catalog and solicit regular feedback on this process.



### **Use culturally responsive and community-centered approaches.**

Tailor metrics and evaluation strategies to be culturally relevant, respectful of community values, and aligned with the lived experiences of the populations being served.



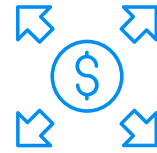
### **Identify and partner with equity-focused evaluation partners.**

Hire evaluators with competencies in equity-focused evaluation approaches that center cultural responsiveness to conduct comprehensive assessments of program metrics and evaluation efforts.

# 3

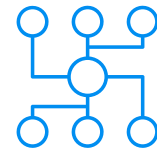
## CALL TO ACTION

# Invest in evaluation innovation.



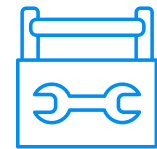
**Put less emphasis on and invest fewer resources in quantifying or validating the impact of individual institutions, including your own.**

Innovate in evaluation by deeply supporting community-informed forms of evaluation, whether it is grassroots research collectives, Indigenous learning communities, or other forms of collective learning that challenge traditional norms.



**Provide grant partners with flexible funding and the technical support to build data infrastructure.**

Data, measurement, and evaluation are expensive and require long-term, sustained investment to see their full potential. Allocate resources and funding for grant partners to build out their data systems, allowing for experimentation and exploration of new methodologies and approaches to their work. Work across funding institutions to advocate for, support, and build grant partner-informed and -led infrastructure for the field, whether that is advocating to increase affordability and ease adoption of technology, supporting the developers of open-source tools to grow and expand, or beyond.



**Strengthen grant partners' evaluation capacity.** Provide resources, training, and technical assistance to grant partners to help them increase their learnings on metrics and evaluation, as well as hire staff focused on data collection and tracking progress.

# 4

## CALL TO ACTION

# Provide flexible, multiyear funding.

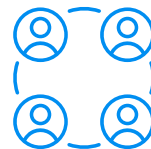


### **Prioritize funding BIPOC led organizations for the long term.**

Expand the provision of multiyear, general operating support. This funding would provide reliable funding and give BIPOC leaders more liberty in how they resource their organizations. Expand the range of funding and support provided to grant partners to be more patient, risk-tolerant, substantial, and reliable. Identify and change any inequitable funding practices.



**Reduce reporting burden for grant partners.** Streamline application and reporting processes to reduce administrative burden and free up time for grant partners to focus on program implementation and impact.



### **Collaborate with other funders to create more equitable funding ecosystems.**

Build collaborative, multi-funder initiatives focused on equitable funding for BIPOC-led organizations and leaders (e.g., a funder collaborative centered on evaluation capacity strengthening funding and technical assistance). Find, support, and collaborate with philanthropic intermediaries that have trust-based relationships with BIPOC leaders and communities.



---

## RESOURCE BANK

- [Trust-Based Philanthropy Project](#)
- [Advancing Culturally-Responsive and Equitable \(ACE\) Evaluation Network](#)
- [Eval Matrix](#)
- [Why Am I Always Being Researched?](#)
- [The Equitable Evaluation Initiative](#)
- [Decolonizing Research](#)
- [Black Voices, Black Spaces Report](#)

These CTAs and recommendations emphasize that equitable funding is about more than grantmaking and resourcing data infrastructure. Equitable funding is about unblocking power that BIPOC leaders hold to define success and drive the development of metrics and data practices that will bring the most benefit to the communities they serve.

*(Left) 2020 Echoing Green Fellow Charlot Magayi, Founder of Mukuru Clean Stoves.*



# APPENDICES

---

## APPENDIX I

### Research Methods

**Interviews:** Nonprofit and social enterprise interviewees were identified and recruited based on their diverse experiences with the topic and demographic backgrounds. Funder interviewees were identified and recruited with the aim of including diverse types of philanthropic organizations. Interviewees were identified and recruited by Echoing Green and MPHI and were offered a \$100 gift card for their time and feedback. The interview protocol was piloted and designed to further explore findings from the literature review and address the four research questions listed in the table above. The protocol was piloted by both types of interviewees to ensure the protocol included the most relevant topic areas and to refine the questions. We asked pilot participants several questions immediately following their interview to assess question effectiveness as a means to confirm the validity of the interview questions. Pilot participant responses were used to revise the interview questions where necessary to strengthen the protocol. Participants were sent a pre-interview survey in advance of their interview, which included questions about their position and responsibilities; organizational profile (e.g., annual budget, board characteristics, and issue areas of focus); and type of metrics currently being used. A total of 22 interviews were conducted, including the pilots (12 with grant partners and 10 with funders) for more specific examples and descriptions of metrics used and their impact from the perspectives of both grant partners and funders. Interviews were analyzed using Dedoose software to code responses and to identify quotes that were helpful in illustrating the trends reported by interviewees.

**Surveys:** An online survey was used to collect feedback from a larger, more representative sample. Both nonprofit (excluding churches and schools) and for-profit social enterprise organizations were eligible to complete the online survey. Survey outreach materials encouraged BIPOC leaders to complete the

survey to ensure that BIPOC leaders would be well-represented in the sample. The first 100 survey respondents could request a \$75 gift card and all other participants were able to enter into a drawing for \$250. Five partners assisted with distributing the survey to their email distribution lists and networks. With assistance from Candid, a directory of grant partners and funders was used to send 50,839 invitations for the online survey. A total of 409 surveys were completed (N=366 grant partners; N=43 funders), yielding a 1% response rate. The survey protocol was designed to further explore findings from the literature review and address the four research questions of this project. (See Appendix II for survey protocol.) The survey also included four items from the State of Evaluation survey that was conducted by the Innovation Network in 2010, 2012, and 2016 to allow for comparison over time. The protocol was piloted by a funder and nonprofit leader to ensure the protocol included the most relevant topic areas, refine the questions, and ensure usability of the online survey format. (See Appendix II for survey protocol.) We asked pilot participants several questions immediately following their interview to assess item effectiveness to confirm the validity of the survey and usability. Pilot participant responses were used to revise the survey where necessary to strengthen the protocol. Full reporting of grant partner and funder survey data is provided in Appendix II.

**Limitations:** The response rate calculation is only based on surveys sent through the Candid directory distribution because the number of organizations who received the survey through the other five partners is unknown. While the survey response rate is low (1%), findings from the surveys were triangulated with findings from the interviews and literature review to uplift common themes. Given the small funder sample size, the quantitative data in the body of this report relies more heavily on the grant partner data.

## APPENDIX II

---

### Data Collection Tools and Analysis

**The interview guides** for both funders and grant partners can be found here: [Funder Interview Protocol](#) and [Grant Partner Interview Protocol](#). The complete **survey** protocol (with questions for both funders and grant partners) can be found here: [Echoing Green Metrics and Evaluation Survey](#).

**Survey results** can be found here: [Grant Partner Survey Results](#) and [Funder Survey Results](#).

## APPENDIX III

---

### Sources of Information

The following individuals and organizations participated in the interview component of the research. Five individuals requested to remain anonymous.

- Alvin Warren, LANL Foundation
- Casey Ryu, Zoom
- Dominica McBride, Ph.D., BECOME
- Dr. Dorian Burton, Southern Reconstruction Fund
- Erik Stegman, Native Americans in Philanthropy
- Jehiel Oliver, Hello Tractor
- Khalil Fuller, Learn Fresh & Gift Card Bank
- Lilliane Ballesteros, Latino Community Fund of Washington State
- Luc Athayde-Rizzaro, Ford Foundation
- Maurice Samuels, Ph.D., Sierra Health Foundation
- Oluwatoyin Ayanfodun, Tomorrow's Leaders NYC
- Percilla Frizzell, Sacred Generations
- Reyna Montoya, Aliento
- Sandy Fernandez, Mastercard Center for Inclusive Growth
- Subarna Mathes, Ford Foundation
- Swapna Reddy, Asylum Seeker Advocacy Project (ASAP)
- Theresa Chen, Independent consultant
- Tilly Josephson, Zoom
- William Jackson, Village of Wisdom

## REFERENCES

---

Chicago Beyond. (2019). *Why am I always being researched?* [https://chicagobeyond.org/wp-content/uploads/2019/05/ChicagoBeyond\\_2019Guidebook.pdf](https://chicagobeyond.org/wp-content/uploads/2019/05/ChicagoBeyond_2019Guidebook.pdf)

Council on Foundations. (2022). *Grantmaker salary and benefits report: Key findings*. <https://cof.org/sites/default/files/documents/files/private/2022-GSB-KeyFindings.pdf>

Dorsey, C., Bradach, J., & Kim, P. (2020, May 4). *Racial equity and philanthropy: Disparities in funding for leaders of color leave impact on the table*. Bridgespan. <https://www.bridgespan.org/insights/disparities-nonprofit-funding-for-leaders-of-color>

Gilmore, R.W. (2002). Fatal couplings of power and difference: Notes on racism and geography. *The Professional Geographer*, 54:1, 15-24, DOI: 10.1111/0033-0124.00310

Grantmakers for Effective Organizations (2022). *Centering equity through flexible, reliable funding*. <https://www.geofunders.org/resources/centering-equity-through-flexible-reliable-funding-1371>

Indigenous Corporate Training Inc. (2017). *9 terms to avoid in communications with Indigenous peoples*. <https://www.ictinc.ca/blog/9-terms-to-avoid-in-communications-with-indigenous-peoples>

National Committee for Responsive Philanthropy. (2018). *Power moves*. <http://www.ncrp.org/wp-content/uploads/2018/04/Power-Moves-Philanthropy.pdf>

Romans, A., Staniel, C., & Harley, T. (2022, May 24). *Measuring is an act of power: A call for pro-black measurement and evaluation*. Nonprofit Quarterly. <https://nonprofitquarterly.org/measuring-is-an-act-of-power-a-call-for-pro-black-measurement-and-evaluation/>

Valencia, R. R. (2010). *Dismantling contemporary deficit thinking: Educational thought and practice*. Routledge.

Valencia, R. R. (2012). *The evolution of deficit thinking: Educational thought and practice*. Routledge.

Villanueva, E., & Barber, W. J. (2021). *Decolonizing wealth: Indigenous wisdom to heal divides and restore balance*. Berrett-Koehler Publishers.

**echoing  
Green**

[www.echoinggreen.org](http://www.echoinggreen.org)



[www.mphi.org](http://www.mphi.org)