



## Our Evaluation Values

*Schott wants to be clear and transparent about our institutional values that undergird all of our evaluation efforts. We welcome feedback from our grantees and our philanthropic partners.*

### **Strengthening the education justice movement is at the center of our evaluation efforts.**

We believe that evaluation must first and foremost be responsive to the education justice movement on the ground, particularly to the work of our grantee partners and allied organizations. We trust these partners to identify evaluation priorities that are of immediate use in their work. Schott's role as a funder is not to control the production of knowledge by dictating the kinds of information that matter — through grant applications and final reports — at the detriment of grassroots learning, leadership cultivation, organizational capacity, and growth. Rather, our role is to facilitate a culture of shared documentation, learning, and reflection that informs grassroots organizing efforts and education policy solutions through the lens of race, class, and gender justice.

We learn through democratic relationships with our grantee partners, in which we collaboratively identify the implications of our experiences for our respective organizations and the greater education justice movement. We do not feel we need to control through artificial definitions of success and excessive (and unfunded) demands. Our purpose in evaluation is to advance our joint work and understand its effect on a political ecosystem populated by many other actors working for or against equitable public education. Our grantee partners do not have to fear disinvestment or other sanctions for "unsuccessful" organizing strategies or campaigns. Instead, we recognize their agency in determining how evaluations impact their long-term work, understanding that peaks and valleys are normal and expected.

**Our values are infused in each stage of an evaluation project, and we celebrate evaluation as a political act.** The questions we ask, the information we gather, the way we interpret and ultimately use our findings — are choices that are closely intertwined with our

social justice values. Whenever we hire an external evaluator they must share these values.

Evaluation is not neutral — it is a very political act. This recognition does not jeopardize assumptions about its utility or robustness, nor does it mean that we do not want high-quality evaluations or the greatest impact. We do. As we work toward equitable education for all, we want evaluations to answer the "So what?" question and the "Who is better off?" question. Asking these questions helps us to be accountable to the students and families most impacted. It helps us monitor when the needle moves, which guides our resourcing and organizing strategies. As a political act, our evaluations are concerned with and reflect the lens of movement building and social change.

Schott closely scrutinizes evaluation methods originating in mainstream nonprofit sectors for applicability and transferability before we adopt them. Our work is unique, and most of the widely-adopted evaluation principles did not originate from the efforts of social justice funders, 501(c)3 grassroots organizing, or policy change work. Undergirding many evaluation methods are corporate principles such as "efficiencies," "trade-offs," "replication," and "cost-effectiveness" that can normalize micro-level strategies at the expense of structural change.

### **Our approach resists attempts to perpetuate white supremacy and hegemony in evaluation.**

Our mixed-method evaluations include both numbers and stories. Lived experiences are not anecdotal, perpetually subjective, or inherently inferior to numerical data. Instead, stories and storytelling produce counter-narratives that are critical to the fight for fully-funded, quality public education for all. Our grassroots leaders are *knowers*; they produce knowledge that informs strategy and education policy as well as data. Our role as an echochamber and provider of technical assistance

around communications is to position grassroots leaders as experts. We resist quieting and smothering grassroots leaders' voices by positioning evaluation as only the act of a "qualified evaluator" producing "credible" or "evidence-based" findings and recommendations.

**Our evaluations are emancipatory.** They emphasize systemic and structural forms of injustice and do not perpetuate injustice by contributing to the erroneous narrative that individual-level factors (alone or primarily) cause persistently and historically poor education outcomes for students of color and students from diverse backgrounds.

**The best evaluation is one that is useful, providing in-depth insight and analysis.** As an intermediary funder, we are in close communication and collaboration with our grantee partners and our philanthropic partners. We know the education justice field and support it in multiple ways, particularly through grantmaking, policy research, and communications resources. Along with our partners, we also help shape the field and seek to increase the engagement of the broader philanthropic sector in the education justice movement. This means our evaluations require depth and meaningful inquiry. Cherry-picking "easy" metrics and broad, superficial, or overly descriptive data will yield trivial, inconsequential, and unimportant findings. To facilitate the management and use of purposeful evaluations and support our partners' grassroots organizing, we:

- Set up evaluation at the start of every initiative to examine not just the grantee partner's work, but Schott's role as well;
- Allow the focus and priorities of evaluation to change over time (scaling up and down as needed to inform strategy rather than answer narrowly defined evaluation questions);
- Establish formal feedback loops between program staff, the evaluator(s), and grantee partner(s) or allied organization(s);
- Embed evaluation activities in everyday functions, so that staff can learn quickly from tangible data and use it in policy advocacy, fundraising, and communications;
- Anticipate critical junctures and the role of evaluation in shaping grantmaking and policy advocacy

strategies;

- Ensure timely analysis and reporting of data through the provision of reports, presentations, or visual media such as videos and infographics;
- Schedule formal opportunities to review and discuss findings across all levels of the organization (e.g., from fund development to executive leadership teams); and
- Manage the burden of evaluation across each level of the organization while maintaining high but reasonable standards.

This implies that large, summative evaluation reports are most helpful for documenting our story over a multi-year period, but ongoing interrogation of evaluation data yielding actionable results is most useful and desired. Our evaluation practices will be written and documented products cataloged to maintain institutional memory over time. Our evaluation practices should also incorporate financial resources for evaluation and build the evaluation capacity of grantee partners.

**Attention to "causation" versus "contribution" will change with each evaluation project.** We may not always be able to distinguish our efforts from those of other donor partners or other actors; therefore, the focus will generally stress "contribution," such as:

- What did Schott/grantee partners/allied organizations contribute to the movement?
- How did Schott/grantee partners/allied organizations accelerate the work?
- Is the movement infrastructure stronger? Did we build and use our power to affect change?

We also acknowledge that evaluation is just one source of information—one type of *knowing*. To manage expectations about evaluation, we stress that evaluation results are always used in conjunction with other information such as available funding and internal capacity.

**We emphasize meaningful metrics in reviewing short-term and long-term outcomes.** Progressive change can be slow or fast, depending on the political climate. This makes evaluating our work more complex. An evaluation metric is real if it matters—if it can be used in planning, forecasting, and summative assessments. It is centered on our grantee partners.