



Exploring Equity as an Evaluation Thought Partner

Affordable Housing Strategy Evaluation Partnership

By: Laura Sundstrom and Eleanor Hill, Vantage Evaluation

[Vantage Evaluation](#) first started working with The Colorado Health Foundation's (CHF) affordable housing strategy team in 2019, one year into CHF's official entrée into the housing space. Our evaluation work and our relationship with the affordable housing strategy team have evolved since we first started working together and particularly as the team's housing justice work has deepened. Over time, we have become an evaluation thought partner to the strategy team, helping connect evaluation and learning throughout their strategy conversations, as well as working on discrete evaluation projects on specific topics of interest to the strategy team. Vantage has worked with CHF on discrete evaluation projects in the past, but this is the first time we intentionally engaged in a long-term partnership with one strategy team.

In our role as an evaluation thought partner, we are embedded within the strategy team. This provides us with a holistic view of the work of the housing strategy team and enables us to identify and respond to the team's evaluation and learning needs. Through our embedded approach, the Vantage team has a better sense of the activities and strategy of CHF as a whole to understand how the affordable housing strategy fits within the larger ecosystem of the organization and aligns with other priorities. Through this understanding, the Vantage team can push the affordable housing strategy team in actionable ways that align with the overall context of CHF.

All organizations benefit from a critical thought partner that is embedded in their work but outside the organization and can take a step back and provide meaningful insights. Foundations are in a unique position to benefit from this in relation to equity. At this moment in history, foundations are reckoning with their inequitable and racist histories in search of more equitable approaches and futures, including CHF. Foundations make decisions daily that profoundly impact communities – yet these decisions are often made in a bubble removed from those most impacted and not always tested and questioned.

CHF has been working to deepen its commitment to racial equity and the affordable housing team specifically has been adopting a housing justice frame for their work. The Vantage Evaluation team supports the housing strategy team to do this work by bringing our skills in asking critical questions, sharing alternative viewpoints, and collecting and presenting data that both challenges and builds on the work of the affordable housing team.

Building Trust

Essential to our role as an evaluation thought partner is trust. To help build trust, we set aside time for relationship building at the beginning of our engagement. We intentionally built-in time to our first contract, not just to get up to speed on the affordable housing system in Colorado, but to get to know the team within CHF that we would be working with.

In one of our early meetings together, we facilitated a conversation to better understand the different perspectives, backgrounds, and potential biases that we all bring to the work. We used an identity wheel activity to explicitly name the various identities we brought to the project, how these identities influence how we show up professionally, and the implications these have for how we approach the evaluation work and working together as



a team. This session helped us form stronger relationships across the core Vantage and CHF teams and grounded the evaluation and learning work within the perspectives and biases of the people guiding the work. With team transitions on both sides, we have not revisited this activity, but it would be a good opportunity to explore how things have shifted and where our perspectives have deepened or changed.

The trust between the two teams continues to be built over time, as Vantage learns about the workings of CHF and the affordable housing strategy and CHF staff embrace the Vantage team as an extension of their own.

Freedom to Experiment when Incorporating Equity Principles

This thought partnership role and the trust we continue to build with the affordable housing team has allowed all of us to experiment and push ourselves further in our approaches to equity and housing justice. When we think about incorporating equity principles, we look at both process and outcome. We seek for our evaluation processes and outcomes to embody equity principles. One of the things we often ask ourselves is, “What is the most equitable decision or approach we could take given the context and constraints of this project?” We also seek to incorporate an understanding of how equity shows up in both the process and outcomes of CHF’s affordable housing work.

One of the ways we do this is through the development of our learning and evaluation questions each year and on each discrete evaluation project. We make sure that there are questions that examine both process and outcome as it relates to equity. This looks different depending on the focus, scale, and scope of the project. Some questions we have incorporated include:

- What would need to change to bring equity more into the Housing Priority’s (1) processes and (2) outcomes?
- How and to what extent are different groups, especially those most impacted, engaged in the work? Given the work and the context, how well do the current approaches to community engagement reflect equitable processes?
- Which communities are experiencing the greatest positive change? Which communities are not being well served and what is hindering this or getting in the way? What else is contributing to this?

Exploring how equity shows up in both processes and outcomes of our work influences the methods and approaches we use and how we engage with the strategy team. Specific methods or approaches that we have experimented with include:

Power Mapping: We are just beginning the planning phase of a community engagement approach to power mapping. In this component of the work, we will engage CHF staff and external partners to better understand how power and control are currently exercised within the affordable housing development process. Through this, we will explore how CHF can use their influence to elevate existing community power and shift power and control so that individuals and communities can shape the housing solutions they want and deserve. This is a new process for both Vantage and CHF to support the strategy team in identified strategic priorities moving forward.

One of the considerations that we continue to explore with the CHF team as we develop the power mapping process is to understand how external partners that we engage would also benefit from this process. We want to ensure the power mapping process is not just something that CHF wants to do and has little to no benefit for external partners who will provide time and knowledge. In this way, we are making the process mutually beneficial. External partners not only need to be financially compensated for their time and expertise, but also find value in the process. Once we uncover the value that external partners are seeking, we anticipate that there may be some tradeoffs to consider between what CHF wants to accomplish and what external partners want to accomplish.



Meeting Observations: As the strategy team has solidified their housing justice frame, the Vantage team has started to conduct observations of their monthly strategic planning meetings to document and elevate how thinking and conversation is reflective of the team's principles of housing justice. At the end of the year, we will conduct a longitudinal analysis of our observations across the year to explore with the strategy team. We will investigate the areas of housing justice that were focused on throughout the year and which areas did not receive as much attention. The goal is to support the strategy team in continuing to deepen their understanding of housing justice and how that shows up in their work.

Continuing to Revisit the Ultimate Change: We started our engagement with the affordable housing strategy team with an exploration of their theory of change. This was early on in their development of the affordable housing strategy. Since then, the strategy team has evolved in how they think about affordable housing work, with a deeper focus on historic and current systemic inequities, racial equity, and housing justice. We continue to revisit with the strategy team the change that they hope to see in the housing system in Colorado as a result of their evolving approach to their affordable housing strategy. This allows us to continue to push the strategy team to consider both their equitable processes and outcomes (and how their actions connect to these), as well as to support the Vantage team's understanding of what the strategy team is working towards.

Exploration of Housing Justice and Racial Equity in Other Foundations: The Vantage team conducted a review of how other foundations and grantmaking organizations have approached equity in their work, specifically around housing justice. This review was shared with the affordable housing strategy team to inform how they developed their definition and vision for housing justice.

One big area of discussion for both the Vantage Evaluation team and the affordable housing strategy team is: Who do we consider to be the community? We continue to push the CHF team to better understand who they are defining as the community in any given context. And for the Vantage Evaluation team, we aim to ensure that the voice, perspectives, and expertise of the community is incorporated into our evaluation work. Doing this sometimes includes tradeoffs based on resources, including budget and timeline. This is especially difficult in the context of philanthropic work because CHF is often at least one-step removed from the intended beneficiaries of the work.

For example, the Vantage team explored the retrospective impact of an investment that CHF made in the Chaffee Housing Trust. As part of this evaluation, CHF wanted to better understand the impact that the Chaffee Housing Trust had on homeowners. Through the interviews that we conducted with homeowners, we incorporated strategies to ensure that it was as easy as possible for them to participate in the process, including offering incentives, various methods of engagement (video or phone), and night and weekend times to account for work schedules. However, because of time and budget constraints, we were only able to conduct interviews with four homeowners, which made it hard to draw conclusions.

Being a thought partner to the affordable housing strategy team and engaging in these various equity-focused activities allows the Vantage team to take a systems analysis lens to this work. We can incorporate an understanding of the historic and current inequities in the housing system, how those impact CHF's work, and where CHF thinks they can have the largest impact. With this understanding, we can appropriately direct our evaluation and learning efforts to be more useful, relevant, and actionable.

