

Participatory Learning and Evaluation Planning



Participatory learning and evaluation is relatively rare in philanthropy, even by funders practicing participatory grantmaking, but it is an important part of the philanthropy process that offers significant opportunities for funder organizations to shift power to the communities they serve. (For further discussion on this topic, see a [related post at Insights for Change](#).)

Participatory learning and evaluation is an approach that involves the people who are impacted by the work in the learning and evaluation process. It shifts some of the power held by external or staff evaluators to the people who are closest to the work. Participatory approaches in philanthropy, including participatory evaluation, center the leadership, wisdom, and voices of communities. They shift power from philanthropy's traditional power centers to the people directly affected by the work.

We have identified three core principles of participatory evaluation:

- 1 Learning and evaluation is a two-way street that benefits everyone involved
- 2 People closest to the issues are the experts of their experiences
- 3 People closest to the issues should be able to participate in learning and evaluation

Key Recommendations for Participatory Learning and Evaluation Planning

Conduct a Power Analysis

As you embark upon your participatory evaluation journey, take some time to understand learning and evaluation as a power center in your organization and where you have opportunities to shift power to participants.



Key questions for evaluators to explore:

- Q. What power do either internal or external evaluators hold in your organization right now?
- Q. What would it look like if more power was shared with communities closest to the work in the learning and evaluation process?
- Q. Where in the learning and evaluation process are there opportunities to shift power to communities immediately?
- Q. How can the learning and evaluation process change to open up more opportunities to shift power?

Key Recommendations *(continued)*

Start Somewhere

Start with what is possible for your organization, and be clear and upfront about what aspects of your learning and evaluation process are participatory or not participatory.



There are many approaches

Launching a participatory evaluation for the first time may be overwhelming. Remember that participation may be understood on a spectrum and that participatory evaluation is not an all-or-nothing proposition. There are many ways, large and small, that you can make learning and evaluation at your organization more participatory. It is not necessary (or even helpful in most cases) for you to implement every participatory approach at the same time. Perhaps you are not ready to cede power over the entire evaluation process to participants, but it is possible to involve them in deciding what is measured or in interpreting data collected or in creating your final evaluation report.

Defining the scope of the evaluation

One question that funders frequently ask when defining the scope of their participatory evaluation is, "Should participants come from the grantees we work with or the people those groups serve?" Our answer is, "Either or both, depending on your context." Including grantees and their beneficiaries in the same group may be complex, but also may have additional benefits for participants. Depending on your goals and your existing relationships, it may be more realistic to start by working directly with your grantees and work on expanding your group of participants at a later time.

Shift from Evaluation for Accountability to Evaluation for Learning

When making a shift toward participatory learning and evaluation, we also recommend that you shift from an evaluation mindset to a learning mindset. This is because a learning mindset emphasizes benefits for everyone involved in the learning process. An evaluation mindset may imply that the evaluators involved bring an objective perspective, but learning emphasizes working together for the benefit of all. Evaluations also typically turn the lens on the grantee and not the foundation – but consider how and where grantees or others can give feedback on their experience with your foundation.



Key Recommendations *(continued)*

Redefine Expertise

Consider the expertise of those closest to the issues as just as valuable

Across philanthropy, but especially in fields like health, science, and climate solutions, a certain type of expertise is given more weight in both decision making and evaluation. Over the years, this has meant that people with credentials like PhDs, MDs, or JDs, have made decisions for the people most impacted by the issues, often without consulting the people affected or without appropriately valuing non-academic expertise. While the rigorous knowledge people with academic credentials have is certainly valuable in many contexts, participatory learning and evaluation recognizes that it is not the only type of knowledge or expertise that should be valued.



A significant mindset shift, not only from funders, but from community members is required

Consider the expertise of those closest to the issues as just as valuable, or in some cases more valuable, than traditionally held forms of academic expertise. This approach can be challenging because it requires a significant mindset shift, not only from funders, but from community members themselves, who may often undervalue their own expertise. Participatory evaluation explicitly acknowledges this power dynamic and prioritizes integrating the most relevant types of expertise to the work that is being done.

We recommend that you, as a funder, continue to interrogate the ways you value expertise throughout the learning and evaluation process, and make explicit efforts to center the expertise held by people affected by the work you are funding.

Adapt as You Go

Participatory learning and evaluation can be challenging to plan, since the way participants engage and what they recommend is beyond your control.

Tips for effectively planning for participatory learning and evaluation

1. Budget and plan for your participatory evaluation from the very start of your project, at the same time that you secure resources for the rest of your project.
2. Be as clear as possible with participants about what power they do or do not have to change things, such as the evaluation process and timeline.
3. Consider a concurrent evaluation approach, conducting evaluations while the work is underway. This approach may allow for more opportunities to course correct and adjust resources throughout your evaluation.
4. Reduce pressure to complete your evaluation by a certain date by communicating with senior leadership and other key stakeholders about the need for flexibility in your evaluation timeline.

**Have questions about the toolkit?
Or want to learn more?**

Please reach out to Katy Love (katy@fundforsharedinsight.org), the toolkit's co-author with Winifred Olliff, both consultants with experience and expertise in participatory grantmaking.



[Contact Katy](#)