



2024 Annual Report

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1 Director's Message

Dear Partners and Friends,

2024 has been a year of growth and deep learning for the Equitable Evaluation in Philanthropy Project (EEPP). As we continue our work toward our mission to integrate equity into the heart of philanthropic evaluation practices, we are proud to share our progress and key insights. With a small, dedicated team and a network of passionate grantor and grantee partners, we have made meaningful strides in understanding New Mexico's landscape for shifting how philanthropy approaches evaluation and relationship-building. This inaugural annual report reflects our collective efforts and outlines a vision for the future as we strive to expand our reach and deepen our impact.

Thank you for your ongoing support and commitment to equitable evaluation in philanthropy.

Warmly,

Diana Martínez
Founding Director, EEPP

2 Executive Summary

The Equitable Evaluation in Philanthropy Project (EEPP), is a unique entity that is led by a small group of individuals who are committed to seeing New Mexico thrive. We do not have traditional full-time staff, and instead, we operate as a collaborative, cross-sector project.

In 2024, EEPP made meaningful progress in understanding how we can advance equitable evaluation practices across philanthropic organizations.

Our focus has been on:

- **building relationships with grantor and grantee partners**
- **launching practical tools for assessing relationships**
- **sharing key lessons from our consultations and research**

This report highlights the key accomplishments, survey findings, tools developed, and the lessons we've learned throughout the year. As we look toward 2025, we remain committed to enhancing capacity for equitable evaluation, especially for small and local foundations that are closely tied to New Mexico's communities.



3 2024 Key Achievements: Tools and Resources Launched

- **EEPP Website:** A resource to share latest trends, tools, and EEPP services for advancing equitable evaluation in philanthropy across New Mexico.
- **Reflection Questions for Relationship-Building:** Questions for grantor and grantee partners to reflect on prior to completing the Relationship Assessment Tool.
- **Grantor-Grantee Relationship Assessment Tool:** A practical tool for grantor and grantee partners to evaluate their working relationships, including assessing issues such as trust, power dynamics, and communication.
- **Guidelines for Grantors Shifting to Flexible Funding Models:** A comprehensive guide that offers funders a framework to better adapt their funding practices to evolving community needs and equity goals.
- **Guidelines for Grantors Seeking to Increase Equitable Evaluation:** This tool offer mindset adjustments for grantors seeking to center equity in their practices, particularly with evaluation and learning strategies.

4 Findings: Funder Landscape Survey & Funder Consultations

Key Insights from Funder Landscape Survey:

- **Diverse Perspectives:** Grantees and grantors bring different viewpoints, necessitating nuanced and inclusive evaluation approaches.
- **Challenges and Vulnerabilities:** Open and honest discussions about challenges lead to more meaningful progress in addressing inequities.
- **Trust-Based Philanthropy:** Building trust helps reshape power dynamics and foster a healthier nonprofit ecosystem.
- **Storytelling & Data Sovereignty:** Prioritizing community voices and early agreements regarding data ownership and use are crucial for equitable evaluations and trusted relationships.
- **Transparency & Accountability:** Clear, open communication is key to dismantling power imbalances and fostering accountability in philanthropy.

Key Insights from Funder Consultations:

- **Passion vs. Capacity:** Grantors expressed strong passion for equitable evaluation and relationship-building but face challenges related to limited capacity, especially among small, local foundations.
- **Fear of Starting Without a Plan:** Grantors are reluctant to dive into relationship-building without a structured plan in place, fearing they may not meet expectations or be able to sustain engagement.
- **Strategic Alignment:** Funders desire closer alignment between their relationship-building efforts and their overall philanthropic strategies.

We don't know what that looks like yet, but we're asking the following questions:

- How can we create learning opportunities that contribute to the health and meaningfulness of our relationships?
- Beyond informing strategy and decision making, how can learning together actually be the basis that builds trust and care for each other in this work?
- How can learning together reduce burnout and help heal individual and collective wounds?

—Funder Landscape Survey Respondent

6 Lessons Learned from nearly 2 years of EEPP

1. Relationship Building as Key to Long-Term Impact:

Grantor and grantee partners agree that strong relationships are foundational for trust, transparency, and lasting impact. Building these relationships requires both time and intention.

2. Small Steps Can Lead to Progress:

Grantors can make progress by taking small, intentional steps, such as integrating relational check-ins or reflecting on shifting to flexible funding. These incremental efforts can create meaningful change without overwhelming limited capacity.

3. Planning is Essential for Sustainability:

Intentional planning is key to maintaining momentum in relationship-building initiatives. Grantors who plan timelines, allocate resources, and set realistic goals are more likely to sustain their efforts over time.

4. Communication and Trust are Foundational:

Open, honest communication is critical to managing expectations and fostering transparency between grantor and grantee partners. Strong communication builds trust, even when capacity is limited.

7 Looking Forward: 2025 Priorities

In 2025, EEPP will focus on the following priorities:

- **Scaling Tools and Resources:** EEPP will enhance the reach of its tools, such as the Relationship Assessment Tool and Flexible Funding Guidelines, making them more accessible to a broader range of grantor and grantee partners.
- **Deeper Engagement via Statewide Convenings:** We seek to share lessons, build community, and leverage capacity to advance equitable evaluation practices across New Mexico's philanthropic sector.
- **Expanding Capacity-Building Efforts:** EEPP will continue to support grantors, especially small and local foundations, in overcoming capacity challenges and integrating equitable evaluation practices.

With deep gratitude

We are deeply grateful to all partners who have supported EEPP's work this year. Your commitment to equity in evaluation is what drives our work forward. Special thanks to our dedicated board members, survey respondents, funders, partners, allies, friends, and others whose vision and hard work have made this year's accomplishments possible.

EEPP

Mission Vision

To embed equity into the core of evaluation practices within philanthropy, ensuring that both grantor and grantee work in trusted partnership.

A strategically and collaboratively designed evaluation and learning structure that supports equity-focused evaluation; catalyzes learning; lays the foundation for community-inclusive and responsive philanthropy; integrates the strengths of funder and grantee partners; and aligns with the principles of equity, inclusion, transparency, and accountability.

Contact us!

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