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Strengthening Capacity & Equity in New England Evaluation

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"Evaluators strive to contribute to the common good and advancement of an equitable and just society."

(American Evaluation Association, 2018)
INTRODUCTION

BACKGROUND

This report presents results from the Strengthening Capacity and Equity in New England Evaluation (SCENE) study. The SCENE study was conducted between August 2020 and August 2021 by a research group at Boston College with funding from the Barr Foundation.

PURPOSE & INTENDED USES

The purpose was three-fold: (1) to characterize evaluation providers, evaluation practices, and evaluators working in the New England area; (2) to explore whether and how evaluators address inequities and advance equity; and (3) to identify ways to strengthen capacity and equity among evaluators within the region.

By providing an initial assessment to inform future capacity building and learning initiatives, we aim to inform regional evaluation practitioners and commissioners interested in advancing equity in evaluation. Findings are particularly relevant to local affiliates of the American Evaluation Association, including: Greater Boston Evaluators Network, Vermont Evaluation Network, Connecticut Area Evaluators’ Network, Maine Evaluation Society. We also sought to address gaps in the evaluation literature regarding what equity and equity-focused evaluation mean and look like in practice. We plan to submit study results for publication/dissemination in academic journals.
The study was led by Emily Gates, assistant professor of evaluation at Boston College whose research examines the intersections of systems thinking, values, and equity in evaluation theory and practice. Two doctoral students, Eric Williamson and Joseph Madres, worked as research assistants. Eric primarily assisted with the questionnaire design, administration, and analysis and Joe with the interviews and qualitative data analysis. Kayla Benitez Alvarez, an undergraduate student, supported interview data collection and analysis. Jori N. Hall, professor at University of Georgia and whose work focuses on culturally responsive approaches and qualitative methodology, worked as a consultant reviewing study plans, processes, and providing feedback. We drew on principles of pragmatism (Hall, 2013) and collaborative and equity-oriented research in the design and conduct of the study.
METHODOLOGY

QUESTIONS

We addressed five research questions:

1. What are the characteristics of participating evaluators (e.g., demographics, training) and evaluation providers (e.g., size, services) in New England?
2. What does equity mean to evaluators in the context of their evaluation work?
3. To what extent and in what ways do participating evaluators center equity throughout evaluations?
4. What helps and what hinders evaluators when working to center equity in evaluations?
5. What opportunities and needs are there to build capacity of evaluators and within evaluation practice to center equity?

MIXED METHODS DESIGN

We used a sequential, complementarity mixed method design (Creswell & Plano-Clark, 2018) in which multiple methods are used to understand different aspects of or approaches to the phenomenon of interest – addressing inequities and promoting equity in evaluation practice. This involved first conducting an online questionnaire to a census of AEA-affiliated evaluators in New England followed by individual interviews with a subset of evaluators selected for maximum variation.
QUESTIONNAIRE
We developed the instrument by reviewing literature on culturally responsive and equitable evaluation, drafting an instrument, inviting four expert reviews, and conducting six cognitive interviews. The instrument addresses: evaluator backgrounds and characteristics; equity-oriented evaluation practices; and evaluation provider characteristics. We sent the survey to a census of AEA members who indicated living in New England (n=258) and a snowball sample generated by inviting initial invitees to forward the link and posting to relevant listservs (82 responses; approximate response rate of 26%). See the full report for sample characteristics. We administered the questionnaire thru Qualtrics from Nov. 24, 2020 to Feb. 19, 2021 and provided $15 Amazon gift cards to respondents. Analysis involved data cleaning, calculating descriptive statistics, and thematic coding of open responses.

INTERVIEWS
We purposely interviewed a subset (n=21) of questionnaire respondents who indicated willingness to interview and selected to maximize variation in terms of race/ethnicity, gender, state, and area of practice. 21 agreed to participate. See the full report for interviewee characteristics. The protocol addressed their backgrounds in evaluation, how they and/or their teams try to address inequity and promote equity throughout evaluation phases, helpful and hindering factors, and suggestions for strengthening capacity. We conducted interviews from Jan. 12th to Feb. 12th, 2021 via Zoom video conferencing for 50-60 minutes in length. We used a multi-step collaborative coding process in Dedoose moving from deductive and inductive codes to themes.

INTEGRATED ANALYSIS
For this report, we conducted integrated analyses using joint data displays (Fetters et. al 2013; Bazeley. 2012) across questionnaire and interview data for the third research question on whether and how evaluators center equity.
1. EVALUATOR EDUCATION & ROLES

Most SCENE respondents are AEA members (72; 88%), have masters (31; 38%) or doctoral degrees (36; 44%), and have an average of fifteen years of evaluation experience (range 2-40). A majority of have degrees in education, public health, or psychology and work in senior-level researcher/evaluator roles (60; 73%) with more than half as external evaluators (48; 59%) and about one-third internal evaluators (29; 35%). Most reported learning their evaluation skills on-the-job (71; 88%) followed by graduate-level university programs (61; 75%) and professional development workshops (52; 64%).

Complete results available in full report.
2. EVALUATOR DEMOGRAPHICS

Nearly all SCENE respondents identify racially as white (76; 93%) and mostly women (65; 80%) with about one-quarter between 30-39 years old, one-third between 40-49 years old, and one-third between 50-64 years old. About 1 out of 10 respondents indicated belonging to racial/ethnic minority groups: Asian (4; 5%), Black/African American (3; 4%), Hispanic/Latinx (2; 2%), and Multi-racial (1; 1%). Several identify as men (13; 16%) and a few as gender non-binary (3; 4%); about one-fifth (16; 20%) identify as LGBQ+ and few (5; 6%) identify as having a disability.
3. EVALUATOR AREAS OF PRACTICE, AWARENESS, & APPROACHES

SCENE respondents practice evaluation in a variety of areas including public health and/or health services (34; 43%), social services (30; 38%), pre-K-12 education (29; 36%), and higher education (20; 25%).

Most widely used evaluation approaches include participatory evaluation (58; 71%), utilization-focused evaluation (51; 62%) and program theory/program-driven evaluation (47; 57%). Most do not or rarely use AEA’s guiding principles, AEA’s cultural competence statement, and evaluation standards in their work.

44% USE EQUITY-FOCUSED/EQUITABLE EVALUATION

45% NEVER OR RARELY USE AEA’S CULTURAL COMPETENCE STATEMENT

Top 3 Evaluation Approaches

- Participatory Evaluation 71%
- Utilization-focused Evaluation 62%
- Theory-driven Evaluation 57%
4. EVALUATORS' WORKPLACES

SCENE respondents represent all states in New England, with largest percentages from Massachusetts (35; 44%) and Vermont (16; 20%), and a majority from community non-profits (34; 43%) and consulting or private sector work (31; 39%).

About half indicated they work for a small evaluation enterprise or are sole proprietors (43; 54%) and about one-quarter work for medium sized firms (19; 24%). Within their workplaces, about half of respondents (43; 54%) indicated having DEI training and a DEI office or specific DEI-focused staff members (43; 54%).
RESULTS
5. Defining Equity

Complete results available in full report.

This section reports results from an open-ended question asking questionnaire respondents to define equity within the context of their work.

Equity Within Evaluation Process

MINIMIZING EVALUATION TEAM BIAS

“Equity in our work means reflecting on the biases I bring to the work.”

INCLUDING BENEFICIARIES IN EVALUATION PROCESSES

“Ensuring everyone has a voice in the evaluation, particularly those from historically marginalized populations. This is done mostly during design, analysis and interpretation, and reporting.”

CONSTRUCTING MULTICULTURALLY, CONTEXTUALLY VALID KNOWLEDGE

“Being fair about how we collect, analyze, and report data and how we consider implications of our research/evaluation such that it is inclusive, representative, and responsive to the communities we’re serving.”
Equity As a Focus When Evaluating an Intervention

**EXAMINING REACH & ACCESSIBILITY OF INTERVENTIONS**

"Equity means that everyone, regardless of where they live, their language, skin color, or any other way they identify have equal access to resources and opportunities."

**EXAMINING DIFFERENTIAL EXPERIENCES OF INTENDED BENEFICIARIES**

"In our evaluations we are often examining how different groups perceive and experience in the context of the study, but also in the larger educational context."

**ANALYZING DIFFERENTIAL OUTCOMES**

"That the population and sub-populations in the assessment are all positively impacted by the intervention under review."

**INTERROGATING ROOT CAUSES**

"Examining historical power imbalance and inappropriate resource allocations that have disadvantaged some and advantaged other."
Equity as Intended Use of Evaluation

CHALLENGING AND EXPANDING POWER DYNAMICS & DECISION-MAKING PROCESSES

"It means designing and distributing our educational products with those who have traditionally been harmed by and excluded from STEM disciplines, with the goal of changing power dynamics to shift away from traditional power structures for the benefit of those who have traditionally been minoritized in STEM."

PROVIDING PROFESSIONAL TRAINING FOR INTERVENTION STAFF

"On a program level, [equity] also means that the staff within a project have the ability to gain professional growth whether that's about receiving training and gaining technical and "soft" skills or the ability to "move up" in their position within the project."

BUILDING EVIDENCE AND GUIDANCE FOR SOCIAL JUSTICE.

"Evaluation products contribute to identifying & developing interventions/knowledge/guiding principles (at both individual & systems levels) that can get us further towards that end."

"I position evaluation as an instrument in the pursuit of a universal, high quality of life for all, independent of racial identity, gender identity, income, ability status, etc."
"Equity means reflecting on the biases I bring to the work, examining evaluation questions on the whole and disaggregated by race and gender at a minimum, and being clear about actions required to achieve more equity based on the findings of any project."

-SCENE Questionnaire Respondent
RESULTS
Centering Equity

Complete results available in full report.

6. CENTERING EQUITY

SCENE respondents, on average, reported most often centering equity during evaluation reporting and dissemination (m2.88), throughout the evaluation (m2.73), and data analysis (m2.67). Evaluators least often center equity in the funding and contracting phase of the evaluation (m2.22) followed by the evaluation team's composition and reflexivity (m2.48).
Centering Equity

7. EVALUATION TEAM

SCENE respondents reported most often self-examining cultural identities (m2.98) and assumptions (m2.93) and least often being led by evaluators who identify as racial and/or ethnic minorities (m1.83) and having shared lived experiences with the populations of focus (m2.05). Interviews revealed how some evaluators try to enhance the diversity and expertise of evaluation teams by involving community members and conducting equity reviews of evaluations.

77%

Often or almost always critically reflect on how they relate to others with different cultural backgrounds, identities, and/or perspectives than their own.

37%

Often or almost always conduct evaluations as part of a racially and/or ethnically diverse team.

"I've learned that who is on your evaluation team and what experiences they bring is really, really important."

-SCENE Interviewee
Centering Equity

8. THROUGHOUT THE EVALUATION

SCENE respondents **most frequently highlight the strengths of the intended beneficiaries of the evaluation** (m 3.09) and work to build trust with stakeholders from minoritized or marginalized communities (m 3.01). Respondents **least frequently work to mitigate power imbalances in the evaluation context** (m 2.45) and consult with cultural brokers or translators to mediate between the cultures of stakeholders and the evaluation team (m 2.26).

**74%** OFTEN OR ALMOST ALWAYS HIGHLIGHT THE STRENGTHS OF THE INTENDED BENEFICIARIES OF THE EVALUATION.

**39%** OFTEN OR ALMOST ALWAYS WORK TO MITIGATE POWER IMBALANCES IN THE EVALUATION CONTEXT.
Centering Equity

9. FUNDING & CONTRACTING

SCENE respondents *often have to work within purposes and questions set by the funder/commissioner* (m2.86) although they try to prioritize RFPs focused on inclusion, diversity, and equity (m2.52). Interviewees described centering equity in the funding and contracting phase in several ways: selecting RFPs that encourage evaluators and evaluations to examine inequity; having up-front conversations with clients about values and approaches to evaluation; and proposing budgets that allow for equity-focused evaluation processes.

"It's my job to figure out what is fair for our work and what can be a fair study. I would not take on a study where I think I cannot do the work properly and also be fair to my practice." - SCENE Interviewee
10. EVALUATION QUESTIONS & CRITERIA

SCENE respondents **often examine the underlying problem an intervention seeks to address** (m3.08). but much less often answer questions about how an intervention addresses systemic drivers of inequity (m2.29) and **least often include intended beneficiaries in evaluation decision-making (m2.28) and in defining success/criteria (m2.29).**

Nearly all respondents evaluate effectiveness (92%; 73) followed by most who examine the relevance of the intervention to the needs, culture, interests, or circumstances of the intended beneficiaries (82%; 65). More than half of respondents (58%; 46) examine equity of the intervention’s opportunities, experiences, benefits, and/or results as an evaluation criterion within their evaluation work.

"...questions around equity come from good intentions, but they're always on the sideline. They're always on the back burner because the questions from the funder take so much time."  - SCENE Interviewee
11. DATA COLLECTION

SCENE respondents often design and/or modify data collection to culturally and/or linguistically suit the participants (m3.04). Interviewees expanded on this by sharing examples of how they center equity during this phase:

- develop instruments with participant consultation and piloting;
- use data collectors with shared identity/lived experience and member checking;
- and consider access, reduce burden, and maximize benefit for participants in data collection.

"Whether it's designing the instruments, like designing the focus group protocols we...do participatory design of the tool, even implementation of it. We try to avoid this big, dramatic top-down thing." -SCENE Interviewee

"We've tried to shift our model so it's less about reducing burden and more about maximizing benefit." -SCENE Interviewee
Centering Equity

12. DATA ANALYSIS

When analyzing data, respondents reported often disaggregating data by demographic differences (m3.36), looking for potential negative consequences (m3.10), and looking for differential participant access and experiences (m3.00). Least often respondents look at shifts in power to intended beneficiaries and communities (m2.21) and re-distribution of resources (m2.19). Interviewees highlighted how they sometimes disaggregate data and also how they struggle with this due to small sample sizes for some minoritized groups and how they struggle to go beyond disaggregation to analyze inequities more deeply and critically.

“If we're talking about equity, we're not just talking about representation, we're talking about outcomes. I think that's a big one. We haven't gotten all that far with that but I think we're learning there.” - SCENE Interviewee
Centering Equity

13. REPORTING & DISSEMINATION

A majority (68%; 54) often or almost always present reports in formats accessible to intended beneficiaries and about half (55%; 44) make evaluation results, in some form, publicly accessible. Some interviewees discussed how they try to embed processes for shared interpretation and discussion of results with those who participated in the evaluation and disseminate evaluation results in multiple formats.

68%

OFTEN OR ALMOST ALWAYS DISSEMINATE EVALUATION RESULTS IN ACCESSIBLE FORMATS

"We had a data party with all of the folks who had contributed to the study along the way." -SCENE Interviewee

"Committing to sharing something back to them at the very start." -SCENE Interviewee

"Bringing in other voices who have nothing at all to do with the work to help kind of flatten that power dynamic." -SCENE Interviewee

55%

MAKE EVALUATION RESULTS PUBLIC
"We really make efforts to share back data, whether it's in flyers or digested ways of sharing the data back. Sometimes it'll be in a community monthly meeting with the community partners and residents...It's very collaborative."

- SCENE Interviewee
Results
14. Helpful Factors for Centering Equity

Complete results available in full report.

Within Teams

INTERVIEWEES EMPHASIZED THE IMPORTANCE OF HAVING MEMBERS WITH DIVERSE CULTURAL AND LINGUISTIC EXPERTISE, INVITING IN COMMUNITY AND NEW EVALUATOR VOICES, AND FOSTERING CRITICAL, SELF-REFLECTIVE, AND LEARNING CULTURES.

"I'm super excited that we have a team that is more than half people of color. It also includes a co-PI who has a disability. It has multiple team members who identify as LGBTQ, and that we've been able to diversify our group through those partnerships."
-SCENE Interviewee
Helpful Factors Within Organizations

INTERVIEWEES SAID HAVING MISSIONS AND VALUES ALIGNED WITH EQUITY, LEADERSHIP SUPPORT, INTERNAL DIVERSITY, EQUITY, AND INCLUSION WORK, AND DEDICATED STAFF TIME SUPPORT CENTERING EQUITY IN EVALUATIONS.

“This past year, we had a task force to develop values for our organization. And I was on that task force and worked really hard to get the word equity in it after a lot of discussion that not everyone was comfortable with it, but ultimately it is in there." -SCENE Interviewee

“I've got the backing of everyone, all the leadership. Everyone up to the CEO is going to be like yeah, whatever you need, do it. And they're not going to let us make excuses to not center [equity].... I think knowing I've got that backing and support is huge."

-SCENE Interviewee

Helpful Factors Within 2020 Context

PUBLIC ATTENTION ON ISSUES OF RACIAL INJUSTICE IN 2020 PROVIDED A CONTEXT TO FURTHER ADVOCATE FOR EQUITY-FOCUSED EVALUATION ACCORDING TO SEVERAL INTERVIEWEES.

“In the past year, everyone's talking about racism and inequity, that's helped. It's helped to just bring it up as a normalized piece of conversation." -SCENE Interviewee

“But I think this whole dual pandemic that we've just come through certainly is shedding a lot of light on what we need to be doing as a society. And evaluators are part of that. So it's a lot bigger than our little world here." -SCENE Interviewee
RESULTS

15. Hindering Factors for Centering Equity

Complete results available in full report.

Contractual Constraints

QUICK TURN-AROUND TIME, LIMITED BUDGETS, RESTRICTED SCOPES OF WORK, THE NEED TO SECURE AND RETAIN CONTRACTS, EVALUATOR STRESS AND BURNOUT, AND CONSTRAINED EVALUATOR AUTONOMY ALL WORK AGAINST EQUITY-FOCUSED EVALUATION ACCORDING TO INTERVIEWEES.

"We're small in budget, we're small in staff and organizational stability - it almost sometimes feels like it's in conflict with spending a lot of time to do this good work. We can't turn down contracts at this point in our institutional life... if we're offered a job and it raises red flags, it is very difficult for us to say no to it despite the red flags." -SCENE Interviewee

"The often really ridiculously tight time frames that we're working in, very tight budgets limit. You're constantly having to narrow who gets to speak." -SCENE Interviewee

"Some of the larger projects are so scripted and it's just you have to do what they say you have to do and evaluate in the way they want you to evaluate and measure what they say should be measured." -SCENE Interviewee
Hindering Factors Related to Evaluators' Racial Identities and Perceptions of Race in New England

SOME INTERVIEWEES TALKED ABOUT THEIR OWN AND COLLEAGUES' WHITE RACIAL IDENTITIES AS CONSTRAINTS THAT MINIMIZED HOW THEY BOTH SEE AND ADDRESS INEQUITY. SMALL SAMPLE SIZES FOR MINORITIZED GROUPS WAS CITED AS A LIMITATION.

“My colleagues often say well, I'm not sure we should look at race or other demographics because we're all white. So, I keep trying to figure out what to say to that, that's not just like that's the end of the conversation, but trying to think of well if a program only has...what you're saying is all white participants, is there an equity issue in the program? Should we be examining that?” - SCENE Interviewee

“They're not even thinking about anyone that doesn't look like them, so how can I talk about equity and inclusion and diversity within these contexts?” - SCENE Interviewee

“I hear a lot from my colleagues about, well, I had to repress some of the data or oh, I couldn't look at it by X, Y, Z because the numbers were so small and that we'll get back into the predominantly white New England.” - SCENE Interviewee

SEVERAL INTERVIEWEES OF COLOR SHARED EXAMPLES OF RACIAL IGNORANCE AND DISCRIMINATION THAT LIMITED THEIR CAPACITY TO PROMOTE EQUITY AND CREATED INEQUITIES FOR THEM AS EVALUATORS.
Hindering Factors Among Evaluation Stakeholders

INTERVIEWEES SHARED EXAMPLES OF NOT KNOWING HOW TO PROMOTE EQUITY WHEN STAKEHOLDERS DEFINED EQUITY DIFFERENTLY, WHEN PROGRAMS HAVE BUILT-IN INEQUITIES, AND WHEN STAKEHOLDERS ARE NOT COMMITTED TO USING EVALUATION FINDINGS.

...I'm sure our president has read definitions of equity, but I'm not sure he really understands or at least shares my definition of equity.

"Because the dynamics are so power laden that as an evaluator, I really struggle with the ability to even hear those perspectives." -SCENE Interviewee

"When you talk about equity, sometimes it's almost a futile effort. We're bringing in this cool technology project. That's so cool. But, you know what, that kid didn't have breakfast." -SCENE Interviewee

"People will pay X thousands of dollars sometimes and never look at those evaluation findings again, and sometimes they never leave the room." -SCENE Interviewee
Hindering Factors Within the Evaluation Profession

INTERVIEWEES POINTED TO WAYS EVALUATION ITSELF CAN CONSTRAIN EQUITY IN ITS PROFESSIONAL CULTURE AND NORMS THAT PRIVILEGE SCIENTIFIC KNOWLEDGE AND OBJECTIVITY, ASSUMED EVALUATOR ROLE AS EXPERTS, AND A SENSE OF ISOLATION, COMPETITION, AND LITTLE SHARING BETWEEN EVALUATORS AND EVALUATION ORGANIZATIONS.

“I think we have to do some changes in our cultures of evaluation, of defining what a good evaluation is in ways that place more value on the diversity of voices and challenging perspectives that we bring in.”
-SCENE Interviewee

"I think there's a lot of gatekeeping about who is, who has the credentials or experience or whatever to undertake the traditional and nontraditional aspects of evaluation."
-SCENE Interviewee

“There's not a lot of opportunity outside of the companies that I've worked for to talk and share ideas. I think that's a huge gap."
-SCENE Interviewee

“A lot of other evaluators work solo and there’s not really an opportunity to share knowledge and push back on each other's thinking."
-SCENE Interviewee
RESULTS
16. Strengthening Capacity for Equity

Complete results available in full report.

Interviewees Suggested Ways to Enhance and Better Apply Evaluator Skills and Responsibilities

PARTICIPATE IN TRAININGS ABOUT ANTIRACISM, RACIAL JUSTICE, AND INTERSECTIONALITY AND HOW THESE LENSES CAN BE APPLIED TO METHODS

"Something that's new for me is really thinking about why and how quantitative methods have been rooted in an understanding of statistics that has served sort of white supremacist purposes and what we can do to use it in a more equitable way and or what should we use instead." -SCENE Interviewee

DOCUMENT, SELF-ASSESS AND SEEK CRITICAL FEEDBACK ON EVALUATION PROCESSES

"Evaluators need to be able to take critical perspectives on, acknowledge, and accept their own biases, and build into their evaluation work structures that address such biases." -SCENE Interviewee
Enhance and Apply Evaluator Skills and Responsibilities

**LEARN HOW TO WORK TOGETHER ACROSS DIFFERENT CULTURAL IDENTITIES AND WAYS OF KNOWING.**

"Part of that work for white evaluators is understanding how to work with evaluators who have different backgrounds than ours. And in a way that's, you know, not just being deferential, but really being supportive colleagues. I think there's a whole layer of sensitivity and training and understanding and insight that goes way beyond methodology." -SCENE Interviewee

**CRITICALLY APPLY CURRENT EVALUATION SKILLS, SUCH AS SITUATIONAL ANALYSIS, TO IDENTIFY PLACES TO INFLUENCE INEQUITIES WITHIN THE EVALUATION CONTEXT.**

"It's funny because as evaluators and as researchers, we know that things are complex, systems are complex, where we are taught to look at systems. Right? Systems that produce the outcomes... and then when we come to evaluation we should go, well, what can the evaluator do? Well, the evaluation is happening in a system as well...it's really about how we navigate that system." -SCENE Interviewee

**MAKE THE TIME AND SPACE FOR ADDRESSING INEQUITY.**

"I think the biggest and most humbling thing is just how much we need to keep it front of mind and conscious. Because if you're not consciously paying attention, it's very easy to slip and miss things." -SCENE Interviewee
Strengthen Capacity by Building Professional Learning Among Evaluators

SHARE PRACTICAL GUIDANCE, CONCRETE EXAMPLES, AND LESSONS FROM PRACTICE.

“In theory, it’s great. And you can try to do it as much as you can. But what does it really look like in action and what does a good one look like?”
-SCENE Interviewee

“I’ve attended a lot of webinars...really talking to folks and then implementing it. But how do you navigate some of those trickier circumstances or are there any best practices that are more tangible or actual instruments? I need something more concrete.”
-SCENE Interviewee

CREATE PROFESSIONAL LEARNING COMMUNITIES

“I think the biggest one would be the encouragement of evaluators to promote the VOPE voluntary organization of professional organizers, evaluators, whatever the local affiliates of AEA are, things like GBen or Washington evaluators.”
-SCENE Interviewee

“Evaluators do not have any kind of professional learning communities or networks and how important is that right now to build?”
-SCENE Interviewee
Engage Stakeholders to Strengthen Capacity

**EDUCATE FUNDERS AND ENGAGE NEW FINANCIAL PARTNERS.**

"We need to engage in an education campaign among funders to get them to view outcomes as a continuum rather than a pass/fail. And that if they want their programs to be accurately evaluated, they cannot demand 100% success for their programs to be funded again." -SCENE Interviewee

**BRING ON, COMPENSATE, & BUILD CAPACITY OF LOCAL & NEW PARTNERS.**

"Specific to international development, we need more local voices at the table at every stage....The role of evaluators from the US, for instance, should be more in the realm of contributing to evaluation capacity and facilitating training and other network connections, rather than in leading or designing the evaluations themselves." -SCENE Interviewee

**CLARIFY MEANINGS OF EQUITY ACROSS A SPECTRUM OF UNDERSTANDING.**

"If I ask that of every client I had now, I'd probably get five different definitions. And so is that the piece... Do I need my client to come over to my concept of equity or do I need to interrogate based on their concept of equity?" -SCENE Interviewee

"Who's equity? Who's defining equity? And how do we learn how to hold our different ways of seeing ways of thinking contingent?" -SCENE Interviewee
Shift the Field to Strengthen Capacity

INTERROGATE AND CHANGE DOMINANT EVALUATION CONCEPTS AND WAYS OF WORKING

"So if it's baked into the field to a place where right now the norm in the de facto state is operating in this culture of white supremacy, how do we really and concretely turn that on its head to where the de facto way of doing business is operating in a culture of anti-racism?" - SCENE Interviewee

"...removing the mythology of the evaluator as somehow being this neutral vessel that takes this pristine scientific, hermetically sealed methodology that we apply to a situation and then have clear results that are indisputable... there's a threat to that because then it feels like it undermines our work as evaluators. But I think we have to be clearer about the benefits that evaluation provides and what it doesn't provide." - SCENE Interviewee

ADVANCE FIELD-LEVEL CONVERSATIONS, STANDARDS, & ACCOUNTABILITY TO SUPPORT EVALUATORS' CHANGE EFFORTS.

"Evaluators need more power. We talked about issues with professionalization, but if we all agree to a set of standards and ethics in which we don’t fall prey to those power imbalances that pressure us to do work that doesn’t address inequity, that is underfunded, along timelines that are inadequate to do our work well, evaluators in general would have more power. And if we networked effectively and provided support for those standards on a group level, we could approach evaluation negotiations with more confidence." - SCENE Interviewee
"What I would want to say to other evaluators is that equitable work is not something that you can really finish, right? ...It's a process. It's a mindset. And it really requires a lot of humility."

- SCENE Interviewee
RECOMMENDATIONS

1. CONNECT

Identify and build connections between evaluators and those in evaluation-adjacent roles within New England. Expand beyond those affiliated with the American Evaluation Association and local affiliates. Build inclusion and diversity by connecting with those from underrepresented groups within the field and region.

2. LEARN & SHARE

Support evaluation communities of practice & build in opportunities for reflective practice and collective learning, within and across evaluation teams and organizations. Translate frameworks into practical guidance with case examples. Promote sharing between evaluators and across evaluation teams and organizations of promising practices and lessons learned through different efforts.
3. DEEPEN UNDERSTANDING & PRACTICE

Recognize that equity takes on different meanings and that evaluators and stakeholders vary along a spectrum of understanding. Push evaluators and support evaluators pushing stakeholders to deepen their understanding and implications for changing practice.

4. BUILD SUPPORT

Identify ways that funders, clients, and program leaders can support equity-focused evaluation work. This may mean hosting dialogues between funders, evaluation practitioners, and intended beneficiary communities to critique and reimagine evaluation practice. Creating templates, models, and examples for contracts and client-evaluator relationships also could help evaluators push for the time and resources needed.

5. INVESTIGATE

Further research should examine evaluators’ racial identities in relation to the predominantly white New England region and through the experiences of evaluators of color.
30 PRACTICES TO CENTER EQUITY INCLUDED ON THE QUESTIONNAIRE.

1. Work to mitigate power imbalances in the evaluation context.
2. Challenge any assumptions that the intended beneficiaries lack the ability to achieve just because of their culture (i.e., deficit assumptions).
3. Highlight the strengths of the intended beneficiaries of the evaluation.
4. Encourage intervention leaders and/or staff to address root causes of the problem(s) the intervention targets.
5. Work to build trust with stakeholders from minoritized or marginalized communities.
6. Minimize any potential for the evaluation to exacerbate disadvantage or inequity.
7. Consult with cultural brokers or translators to mediate between the cultures of stakeholders and the evaluation team.
8. Conduct evaluation activities in the languages that are relevant/appropriate for the community.
9. Include intended beneficiaries in decision making about the evaluation purpose, approach, and/or questions.
10. Include intended beneficiaries in selecting criteria/definitions of success.
11. Negotiate criteria/definitions of success across different stakeholder groups.
12. Examine the problem the intervention seeks to address and how that problem is defined.
13. Include evaluation question(s) related to equity, inclusion, and/or diversity.
14. Include evaluation question(s) about the outcomes and/or impacts of an intervention on different populations.
15. Include evaluation question(s) about how an intervention impacts or addresses underlying systemic drivers of inequity.
16. Design and/or modify data collection to be appropriate for the culture(s) and language(s) of the people of whom the questions are being asked.
17. Assess whether interventions re-distribute resources to those most marginalized and/or disadvantaged.
18. Look for disparities in access to program services among subgroups of intended beneficiaries.
19. Look for whether and/or how the intervention shifts power to intended beneficiaries and their communities.
20. Examine the extent to which intended beneficiaries were actively involved in the planning and implementation of program activities.
21. Look for potential negative consequences of the intervention.
22. Look for potential negative consequences of the evaluation.
23. Use systems thinking and/or systems methods (e.g., social network analysis, causal loop diagrams, agent-based modeling, critical systems heuristics).
24. Include intended beneficiaries in interpretation of data and sense-making.
25. When possible, disaggregate data by key demographic differences.
26. Examine differential experiences of participants with/during the intervention.
27. Analyze how interactions between race, ethnicity, class, gender, sexual orientation, etc. influence differential outcomes.
28. Look for whether and/or how the intervention contributes to systemic and/or structural change on a local, regional, or larger scale.
29. Present evaluation results in formats accessible to the intended beneficiaries of the intervention.
30. Make evaluation results, in some form, publicly accessible.
Interviewees suggested resources they've found helpful as they work to center equity in evaluations.

- Evaluates the accomplishments, limits, and consequences of using quantitative metrics in global health.

- Systematically investigates the impacts of data mining, policy algorithms, and predictive risk models on poor and working-class people in America.

- Provides a historical record of the development of culturally responsive evaluation.

- Provides readers with specific interactive skills needed in different evaluation settings and contexts.

- Introduces the concept of critical mentoring, presenting its theoretical and empirical foundations, and providing telling examples of what it looks like in practice, and what it can achieve.
Introduces three principles of equitable evaluation and a set of orthodoxies that need to be challenged and changed.

- This guide begins by naming seven inequities held in place by power, and calls out how they get in the way of truth and impact. With each inequity, there are suggestions for potential ways forward for community organizations, funders, and researchers.

- Addresses validity as the foundational aspiration of all evaluation, then moves to a succinct discussion of culture.
- Suggestions for reflecting on the cultural location of evaluation theory and cultural dimensions of context are described.

- Presents a general framing for an Indigenous approach to evaluation. The approach described is applicable to all types of programs in Indian Country, including community-based

- The transformative paradigm is explained and illustrated as a framework for researchers who place a priority on social justice and the furtherance of human rights.

- List of characteristics of white supremacy culture that show up in our organizations.
Data for Black Lives
https://d4bl.org/
- Movement of activists, organizers, and mathematicians committed to the mission of using data science to create concrete and measurable change in the lives of Black people

Design Studio for Social Intervention
https://www.ds4si.org/
- Situated at the intersections of design thinking and practice, social justice and activism, public art and social practice and civic/popular engagement, design and test social interventions with and on behalf of marginalized populations, controversies and ways of life

LA Tech4Good
https://www.latech4good.org/
- Showcases tech initiatives in the greater Los Angeles area that support and inspire social change.

We all Count
https://weallcount.com/
- Offers a variety of ways to learn about equity in data science, from introductions to the base concepts to technical solutions and systems


