An Introduction and An Invitation

Colorado Collaboratory on Equitable Evaluation (2.0)

October 2019

#EquitableEval
A Colorado community of practice...

Colorado Collaboratory on Equitable Evaluation

https://www.surveymonkey.com/r/ColoradoCollaboratory

Silvia Solis
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Everything that we see is a shadow cast by that which we do not see.

Martin Luther King Jr.
The Reality

RACISM
is insidious and permeates what we believe to be true and objective

EVALUATION
• currently reflects a way of defining, describing and analyzing the world based in history
• created in a particular moment, informed by the values, experiences and needs of a small group of middle-aged white heterosexual males
• is felt as extractionary, reductive and lacks context

THE STAKES
are too high for evaluation not to be an instrument of change and in service of a greater good, equity and a path towards liberation
US Philanthropic Evaluation History

Evaluation is a child of government and behavioral sciences. (1960s)

Evaluation in foundations is conceived in a narrow context by a few individuals. (1970s)

Evaluators needed a new market. (1980s-1990s)

Questions regarding the evaluation use and purpose are a constant thread. (Beginning of time)

Evaluation and foundations have a history of coming together and pushing evaluation practice (1990s-)

A Paradigm Shift…
Is what we’re really talking about
MEANS - Deep equity means working toward outcomes in ways that model dignity, justice, and love without re-creating harm in our structures, strategies and working relationships. 

ENDS - Equity is the absence of avoidable or remeplace differences among groups of people, whether those groups are defined socially, economically, demographically, or geographically.

World Health Organization
The Invitation

Reimagine the purpose and practice of evaluation to reflect the values that drive philanthropy and the nonprofits and their intentions and embrace 21st century definitions of validity and complexity.
Equitable Evaluation

Evaluation work is in service of and contributes to equity.

Evaluation work can and should answer critical questions about the:

• Effect of a strategy on different populations
• Effect of a strategy on the underlying systemic drivers of inequity
• Ways in which history and cultural context are tangled up in the structural conditions and the change initiative itself.

Evaluative work should be designed & implemented in a way that is commensurate with the values underlying equity work:

• Multi-culturally valid
• Oriented toward participant ownership

(Emerging Principles, Spring 2018)
EQUITY-FOCUSED EVALUATION PRINCIPLES

1. Has a central focus on inequities
2. Recognizes that inequities are structural
3. Recognizes that evaluation is political
4. Recognizes and values different ways of knowing
5. Proposes to add value to those who are marginalized
6. Requires use post evaluation

SOURCE: Strengthening Equity-focused evaluations through insights from feminist theory and approaches, Katherine Hay,
## Evaluation Has Already Evolved

*(Based on SPRA, 2005 Commissioning Multicultural Evaluation, A Foundation Resource Guide)*

<table>
<thead>
<tr>
<th>Category</th>
<th>Traditional</th>
<th>Culturally Responsive</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Evaluator</strong></td>
<td>Formerly trained/Professional experts</td>
<td>Grantees, community members seen as experts</td>
</tr>
<tr>
<td><strong>Role of Evaluator</strong></td>
<td>Leader, judge, expert</td>
<td>Facilitator, translator and convener</td>
</tr>
<tr>
<td><strong>Design and Planning</strong></td>
<td>Evaluator presents plan for funder approval</td>
<td>Rapport and trust building core to an inclusive planning process reflecting multiple worldviews.</td>
</tr>
<tr>
<td><strong>Data Collection</strong></td>
<td>Evaluator designs data collection instruments and protocols.</td>
<td>Evaluator designs data collection instruments and protocols with stakeholder involvement. Stakeholders trained in and conduct some d/c methods</td>
</tr>
<tr>
<td><strong>Analysis</strong></td>
<td>Evaluator conducts analysis</td>
<td><em>Evaluator leads analysis</em>. Results/meaning derived considering culture and system analysis</td>
</tr>
<tr>
<td><strong>Reporting</strong></td>
<td>Written report &amp; briefing to funder</td>
<td><em>Disseminated to broader community.</em></td>
</tr>
<tr>
<td><strong>Use of Findings</strong></td>
<td>Findings express judgment of worth</td>
<td>Findings used to <em>build capacity of community and community organizations</em></td>
</tr>
<tr>
<td>What makes EE different?</td>
<td></td>
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<tr>
<td>-------------------------</td>
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<tr>
<td><strong>Culturally Responsive</strong></td>
<td><strong>Equitable</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Evaluator</strong></td>
<td>Grantees, community members seen as experts</td>
<td>Grantees, community members and those most impacted, evaluator, etc.</td>
</tr>
<tr>
<td><strong>Role of Evaluator</strong></td>
<td>Facilitator, translator and convener</td>
<td>Partner, learner, facilitator and convener.</td>
</tr>
<tr>
<td><strong>Design and Planning</strong></td>
<td>Rapport and trust building core to an inclusive planning process reflecting multiple worldviews.</td>
<td>Informed by role program/effort plays in overall foundation portfolio and reflecting values which support equity. Evaluation questions and overall plan co-created acknowledging culture, context and mindful of time frames needed to build and sustain authentic relationships and understanding within and across groups.</td>
</tr>
<tr>
<td><strong>Data Collection</strong></td>
<td>Evaluator designs data collection instruments and protocols with stakeholder involvement. Stakeholders trained in and conduct some d/c methods</td>
<td>Co-created inquiry frameworks, data collection tools and protocols grounded in cultural context. Various parties play a role in data collection depending on evaluation questions and methods.</td>
</tr>
<tr>
<td><strong>Analysis</strong></td>
<td>Evaluator leads analysis. Results/meaning derived considering culture and system analysis</td>
<td>Analysis and sense making frameworks conceived of at onset are refined now that data is in hand. Multiple analysis methods used including qualitative, quantitative, indigenous, and network, etc.</td>
</tr>
<tr>
<td><strong>Reporting</strong></td>
<td>Disseminated to broader community.</td>
<td>Various reports/materials are developed, disseminated, discussed and shared depending on audience, findings of interests and intended use.</td>
</tr>
<tr>
<td><strong>Use of Findings</strong></td>
<td>Findings used to build capacity of community and community organizations</td>
<td>Findings used to: 1) inform all matter of decisions and actions including those at the foundation in terms of effectiveness of strategy and understanding of issues/solution, 2) highlight strengths and opportunities that community can leverage; and 3) surface new solutions and roles.</td>
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</tbody>
</table>
The BIG Ideas
(emerging)
Evaluation Underpinnings

Based on Mertens (2011)

Axiology (Value)
How do we decide what is good and what is right?

Ontology (Being/Reality)
How do we decide what is real?

Epistemology (Knowledge)
What information do we regard as fact versus opinion?

Methodology (Systems/Rules)
What information systems/sources do we trust?
To pay attention to feminist, minority and marginalized perspectives is not to give up objectivity for a plurality of subjectivities, but to help achieve greater objectivity by getting a clearer, more expansive and fuller view of our reality.
Quality of the Thinking: The extent to which the evaluation’s design and implementation engages in deep analysis that focuses on patterns, themes, and values (drawing on systems thinking); literature; and looks for outliers that offer different perspectives. Seeks alternative explanations and interpretations; is grounded in the research.

Credibility and Legitimacy of the Claims: The extent to which the data is trustworthy, including the confidence in the findings; the transferability of findings to other contexts; the consistency and repeatability of the findings; and the extent to which the findings are shaped by respondents, rather than evaluator bias, motivation, or interests.

Cultural Responsiveness and Context: The extent to which the evaluation questions, methods, and analysis respect and reflect the stakeholders’ values and context, their definitions of success, their experiences and perceptions, and their insights about what is happening.

Quality and Value of the Learning Process: The extent to which the learning process engages the people who most need the information, in a way that allows for reflection, dialogue, testing assumptions, and asking new questions, directly contributing to making decisions that help improve the process and outcomes.
Evolving and Contextualizing Validity

Karen E. Kirkhart, Perspectives on Repositioning Culture in Evaluation and Assessment, presented at the CREA Inaugural Conference, April 21-23, 2013, Chicago, IL.
Embracing Complexity: Cynefin Framework
Whoever controls information, whoever controls meaning, acquires power.

Laura Esquivel
Our Investment Partners
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