
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

silvia@joiningvisionandaction.com



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)

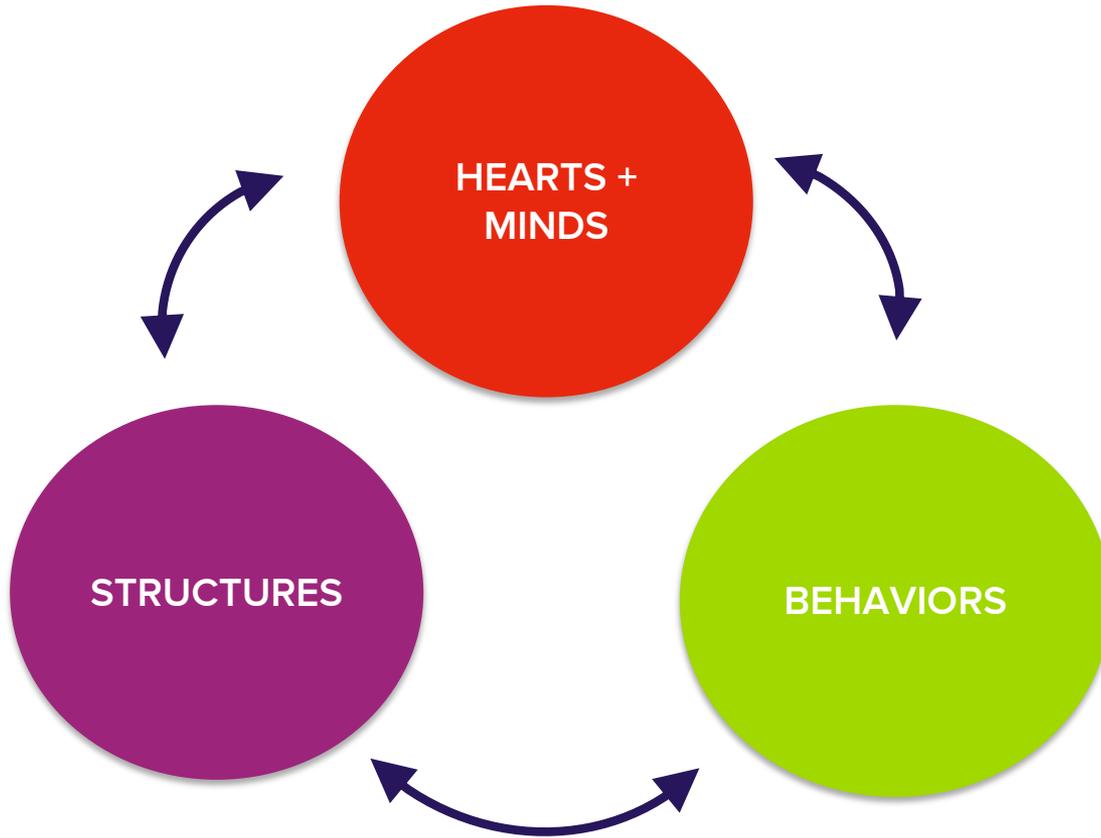
Evaluation in foundations is conceived in a narrow context by a few individuals.
(1970s)

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-)

Sources: Hall, P. D. (2003); Hall, P. D. (2004); Hall, P. D. (2006). Hogan, R. L. (2010); Center for Effective Philanthropy & Center for Evaluation Innovation. (2016)



ABOVE: Wheel of Change for Transformation, Robert Gass

A Paradigm Shift...

Is what we're really talking about

Equity Working Definitions

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**. *MAG*

ENDS - Equity is the **absence of avoidable or remediable 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

(Emerging Principles, Spring 2018)

Evaluation work is in service of and contributes to equity.

- Production, consumption, and management of evaluation and evaluative work should hold at its core a responsibility to advance progress towards equity.

Evaluative 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

SOURCE: Strengthening Equity-focused evaluations through insights from feminist theory and approaches, Katherine Hay,

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

Evaluation Questions

Evaluation Design

Evaluation Judgment

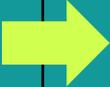
Evaluation Practices

Evaluation Use

Evaluation Has Already Evolved

	Traditional	Culturally Responsive
Evaluator	Formerly trained/Professional experts	<i>Grantees, community members seen as experts</i>
Role of Evaluator	Leader, judge, expert	Facilitator, translator and convener
Design and Planning	Evaluator presents plan for funder approval	Rapport and trust building core to an inclusive planning process <i>reflecting multiple worldviews.</i>
Data Collection	Evaluator designs data collection instruments and protocols.	Evaluator designs data collection instruments and protocols with stakeholder involvement. Stakeholders trained in and conduct some d/c methods
Analysis	Evaluator conducts analysis	<i>Evaluator leads analysis.</i> Results/meaning derived considering culture and system analysis
Reporting	Written report & briefing to funder	<i>Disseminated to broader community.</i>
Use of Findings	Findings express judgment of worth	Findings used to <i>build capacity of community and community organizations</i>

What makes EE different?

	Culturally Responsive 	Equitable
Evaluator	Grantees, community members seen as experts	Grantees, community members and those most impacted, evaluator, etc.
Role of Evaluator	Facilitator, translator and convener	Partner, learner, facilitator and convener.
Design and Planning	Rapport and trust building core to an inclusive planning process reflecting multiple worldviews.	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
Data Collection	Evaluator designs data collection instruments and protocols with stakeholder involvement. Stakeholders trained in and conduct some d/c methods	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.
Analysis	Evaluator leads analysis. Results/meaning derived considering culture and system analysis	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.
Reporting	Disseminated to broader community.	Various reports/materials are developed, disseminated, discussed and shared depending on audience, findings of interests and intended use.
Use of Findings	Findings used to build capacity of community and community organizations	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.

The BIG Ideas

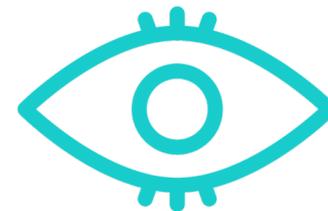
(emerging)

Evaluation Underpinnings



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?

Based on Mertens (2011)

Looking At What Matters

The Edge of Reason, A
Rational Skeptic in an
Irrational World

Baggini 2016

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

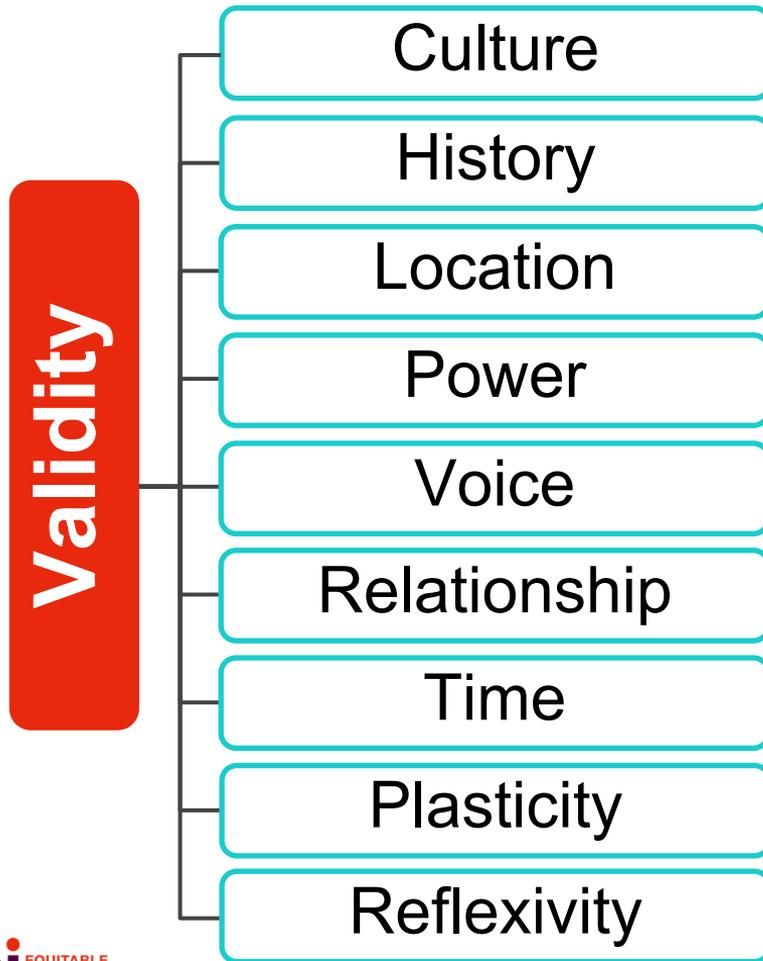
Credibility and Legitimacy of the Claims: The extent to which the data is trustworthy, including the confidence in the findings; the transferability of findings to other contexts; the consistency and repeatability of the findings; and the extent to which the findings are shaped by respondents, rather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

A New Definition of Rigor

Hallie Preskill, PhD FSG
Jewlya Lynn, Founder
PolicySolve
2015 American Evaluation
Association annual conference



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



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*Whoever controls information,
whoever controls meaning,
acquires power.*
Laura Esquivel

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