Rethinking Evaluative Practice in Service of Equity – Equitable Evaluation

United Philanthropy Forum Annual Conference
Boston, Massachusetts

July 18, 2018

#EquitableEval
The History of Evaluation in US Philanthropy

Evaluation is a child of government and behavioral sciences.

Evaluation in foundations is conceived in a narrow context by a few individuals.

Evaluators needed a new market.

Questions regarding the evaluation use and purpose are a constant thread.

Evaluation and foundations have a history of coming together and pushing evaluation practice.

SORRY FOR THE INCONVENIENCE
WE ARE TRYING TO CHANGE THE WORLD
The Invitation

Reimagine YOUR ROLE in shaping the purpose & practice of evaluation to reflect the values and intentions that drive philanthropy and nonprofits.
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
Why it Matters

**RACSIM**
- 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 male

**THE STAKES**
- are too high for evaluation not to be an instrument of change and in service of a greater good, equity
A Paradigm Shift...

Is what we’re really talking about

ABOVE: Wheel of Change for Transformation, Robert Gass
Equity

1. **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

2. **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
Individual/Pairs

1. How does current evaluation philosophy align with ee?
Evaluative Inquiry Cycle

FRAMING the Inquiry:
- Clarify purpose
- Surface assumptions
- Articulate goals & objectives
- Assess organizational capacity
- Identify key questions

FOCUSING the Inquiry:
- Prioritize key questions
- Determine data collection methods
- Review/revise, develop data collection tools and administration protocols
- Integrate data collection with organizational culture/program practice

CONDUCTING the Inquiry:
- Pilot tools/administration and modify as needed
- Collect information
- Communicate preliminary ideas about how findings will be communicated and utilized

APPLYING the Learning:
- Analyze and interpret data
- Use findings to:
  - Inform program and strategy work
    - Modify organizational systems and structure
    - Make decisions around future investments and strategies
    - Contribute to individual growth and educate the field
    - Inform further evaluative inquiry activities

Adapted from Preskill and Torres 1999
The Challenge: Change is Hard

- Make values explicit
- Resist simplicity and the quick fix. Move BEYOND methods and demographics
- Unlearn what we believe to be truth, evidence and rigor
Evaluative Inquiry Cycle – Integrating Equity

FRAMING the Inquiry:
• How do your organizational values and intentions influence?
• In what way does equity show up? Both in process and focus?
• What characteristics of a 3rd party evaluator can support ee?
• Who will “own” the data and findings?

FOCUSING the Inquiry:
• Who determines the questions?
• How are historical/structural/systemic patterns and policies named and explored?
• How are (and who) determines data collection methods?
• How are reflect different ways of knowing and truths reflected?

APPLYING the Learning:
• Who and how is sense made of the data?
• How are findings used and by whom?
• In what ways will findings inform how org thinking about and engaged in equity work?
• In what ways are findings shared with others to advance understanding?

CONDUCTING the Inquiry:
• How is data collected? How will the process reflect multiple perspectives, history, context, et.c?
• How will the data be analyzed and through what lens?
• In what ways does the process support equity?

Adapted from Preskill and Torres 1999
Pairs/Small Group

1. How does current evaluation philosophy align with ee?

2. What (or who) would need to shift to move towards ee?
Advancing Equity through Evaluation

Design Challenge - What is the mindset/practice you wish to shift in service of equitable evaluation? Be SPECIFIC

Opportunity (next 3 months)

Insights

Sources of Support

What I Will Try...

Challenges/Barriers
Small Group/Full Group

1. How does current evaluation philosophy align with ee?

2. What (or who) would need to shift to move towards ee?

3. How will you move ee forward internally and among members?
You never change things by fighting the existing reality. To change something, build a new model that makes the existing model obsolete.

R. Buckminster Fuller
Join Us

EE Project Website: [https://www.equitableeval.org/](https://www.equitableeval.org/)

Twitter Hashtag: #EquitableEval

Equitable Evaluation Initiative launch late July