

Equity & Evaluation: Models of How Equity Can and Does Impact Evaluation

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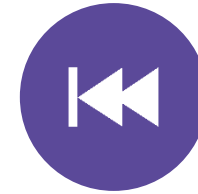
Five Scenarios



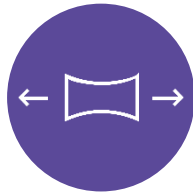
1. Equity as a leading principle



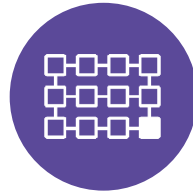
2. Equity as a capacity



3. Equity as an afterthought



4. Equity as a point of tension



5. Equity as tokenism

Scenario 1: Equity as a Leading Principle

How does an evaluator explicitly embed equity into their lens of evaluation?



Scenario 1: Equity as a Leading Principle

The situation:

- Working with a foundation with an explicit focus on equity

The evaluator's role:

- A retrospective evaluation
- Assessing to what extent equity was centered in the work



Scenario 1 (continued)

Where we did well:

- Using a mixed-methods approach
- Embedding participant ownership
- Explicit dive into equity

Where we could improve:

- Even more participant ownership
- Deeper relationship building before data collection



Scenario 1 (continued)

Lessons to share:

- Funders who lead with equity may have a difficult time hearing feedback on how their intentions may be missing the mark.
- A more participatory evaluation may be of interest to equity-based funders but not necessarily in line with their evaluation budgets.

Scenario 2: Equity as a Capacity

How does an evaluator assess the uptick of equity when it is delivered via capacity-building trainings?



Scenario 2: Equity as a Capacity

The situation:

- A multi-year, multi-site evaluation
- Equity explicitly addressed through ongoing trainings and TA

The evaluator's role:

- Evaluate the efficacy, relevancy, and impact of the trainings and TA
- Measure the adoption of equity as a value in each site



Scenario 2 (continued)

Where we did well:

- Using a mixed-methods approach
- Defining equity as a value, but also operationalized through processes

Where we could improve:

- Talk directly to clients about their experiences



Scenario 2 (continued)

Lessons to share:

- Be explicit about equity. Have a clear definition that can be used with all types of stakeholders.
- Ask stakeholders at all levels about their experiences with equity. This includes program leadership, line staff, and the clients themselves.

Scenario 3: Equity as an Afterthought

How does an evaluator focus on equity as a new outcomes years after an initiative has been in place?



Scenario 3: Equity as an Afterthought

The situation:

- Multi-year, multi-state effort
- DEI added as an area of emphasis later on
- Very homogenous field

The evaluator's role:

- Assess grantees against key goals (now including addressing racial and ethnic disparities)



Scenario 3 (continued)

Where we did well:

- Acknowledge the unfunded mandate
- Highlight best practices across grantees

Where we could improve:

- Be candid with the client about positioning DEI work
- Focus more on program officer/staff buy-in and less on the Foundation's reputation



Scenario 3 (continued)

Lessons to share:

- Even foundations with solid reputation around DEI can struggle in using a DEI lens. Don't assume that all program staff are well-versed.
- People without much experience using a DEI lens can be very defensive. Neutralizing the conversation can generate better data and build stronger rapport.
- Sometimes it is unavoidable that a DEI lens gets added to an initiative after it has begun—but this addition should always come with resources and thoughtful technical support.

Scenario 4: Equity as a Point of Tension

How does an evaluator raise issues related to equity that are influencing the work when key players do not have an equity lens?



Scenario 4: Equity as a Point of Tension

The situation:

- Multi-year advocacy campaign
- Lots of discomfort around the issue of equity (from funder and grantees)

The evaluator's role:

- Assess the overall functioning and capacity of the campaign
- Serve as a sounding board



Scenario 4 (continued)

Where we did well:

- Identifying equity as a potential red flag (for campaign dynamics)
- Provide neutral summaries

Where we could improve:

- Be more upfront with the funder



Scenario 4 (continued)

Lessons to share:

- Framing information through the lens of implications for grantee success was fairly effective, as it reduced defensiveness and blame. However, this did not result in any particular self-reflection on equity issues for the funder.
- The evaluator needs to be prepared to acknowledge any elephants in the room in a professional way.

Scenario 5: Equity as Tokenism

How does an evaluator work within a situation when they are asked to favor certain staff over others because of their background and/or identities?



Scenario 5: Equity as Tokenism

The situation:

- An evaluation team with a range of diversity in academic background, gender, sexual orientation, ethnicity, etc.

The evaluator's role:

- Ensure the right team for any given project to support our clients (and staff)



Scenario 5 (continued)

Where we did well:

- Talk to the highlighted staff person about their level of comfort with the request
- Suggest alternatives as needed
- Highlight the whole person

Where we could improve:

- Ensure staff feel appreciated for their whole person
- Continue the dialogue about how staff want requests to be handled



Scenario 5 (continued)

Lessons to share:

- Make staff aware of what's happening behind the scenes.
- Be clear with clients around the decision-making process.
- Understand the difference between outright tokenism and authentic engagement.

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