Considerations for Conducting Evaluation Using a Culturally Responsive and Racial Equity lens

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Acknowledgements

We would like to thank the W.K. Kellogg Foundation for providing us the opportunity to partner and move evaluation using a racial equity lens from theory to practice and for articulating to Michigan grantees their intent to utilize a culturally responsive approach to evaluation. We thank Ali Webb, Chris Kwak, Jocelyn Sargent, and Kimberly James for their assistance and support throughout the evaluation process.

Sincere thanks and recognition are offered to the research and development team charged with thinking through the concepts; doing the major research; attending structured meetings to discuss each step, definition, or article; and collectively determining the relevance of each of these to the work. Thanks also goes to the original research team that worked diligently to frame the lens, the white paper, and the how-to document; all of which represent the majority of this work. The participants of the research and development team are identified in Appendix D.

We would also like to thank the staff at Public Policy Associates, Inc. for reviewing and providing timely feedback on the documents. Thanks also goes to our evaluation partners—Jane Fran Morgan, Pennie Foster-Fishman, and Jerry Johnson—for their review and feedback on the usefulness of the tools to their community-based work.

Finally, thanks goes to Blohm Creative for their thoughtful and imaginative work on designing and presenting the document. We would like to give a special thank you to Stephanie Price for editing every word presented in the work.

Thanks to you all, we are deeply grateful for your help.

Introduction

Nearly 150 years after slavery and 50 years after the Civil Rights Act, racial inequities persist in virtually every public policy area. Children of color as a whole are more likely to die as infants and begin school behind their white peers. Minority youth are overrepresented in the juvenile justice system, as are minority adults in prison. More minority families live in poverty. The reasons are complex. They include the historical legacy of slavery and Jim Crow laws as well as structural racism. For the purposes of this document, we define structural racism as "*the silent opportunity killer. It is the blind interaction between institutions, policies, and practices that inevitably perpetuates barriers to opportunities and racial disparities. Conscious and unconscious racism continue to exist in our society. But structural racism feeds on the unconscious. Public and private institutions and individuals each build a wall. They do not necessarily build the wall to hurt people of color, but one wall is joined by another until they construct a labyrinth from which few can escape.*"[1]

Historically, many organizations have made significant investments in improving community conditions for minority populations. These organizations have thus worked toward a more equitable society, providing services and supports to marginalized groups. In this effort, they retain professional evaluators to analyze programs, measure outcomes, and recommend opportunities for improvement.

It becomes clear that the work of traditional researchers conducting traditional evaluations has had limited impact in helping organizations and communities move toward racial equality. Evaluators, *mostly white*, often have limited understanding of the priority populations (often minorities) that social investments serve. Many times, evaluators fail to talk to the consumers of services or misunderstand them when they do. Moreover, traditional evaluation may not even assess diversity, inclusion, and equity; an omission that makes disparities hard to recognize, let alone address.

[1] "Structural Racism Arts & Social Justice Workshop," *GIA Reader* 20, no. 1 (Spring 2009), http://www.giarts.org/reader-20-1.

In seeking solutions, PPA has developed this resource, "*Considerations for Conducting Evaluation Using a Culturally Responsive and Racial Equity Lens*." This document is a practical guide to conducting evaluation using this lens. We believe evaluators who use them will gain richer insights that can ultimately lead to more inclusive and equitable outcomes—healthier and better educated children and more secure families.

Evaluators must recognize that different life experiences lead to different views of the world, and that linguistic, historical, and socioeconomic differences can be contributors and/or barriers to understanding. Evaluators should also recognize the continuing reality of white privilege and structural oppression that perpetuate racial inequity in America today and develop evaluation protocols that account for these factors. Finally, evaluators using this lens must recognize that each community has its own history and context, which must be acknowledged and considered when assessing the impact of social investments and developing findings and recommendations.

This document is designed to provide evaluators with a practical way to:

- Examine their own backgrounds, beliefs, and biases and improve their capability of conducting evaluation using a culturally responsive and racial equity lens.
- Develop designs and protocols that produce evaluation questions capable of teasing out nuances that are often overlooked by common evaluation processes.
- Assess an organization's (governance, leadership, and staff) commitment to issues of diversity, equity, and inclusion.

Using the guidance contained in this document, evaluators can assemble more culturally competent teams; craft more culturally responsive evaluation designs; gain valuable perspectives from people who have previously been silent, ignored, or misunderstood; and more fully understand the reach, effectiveness, and impact of social investments.

The evaluation lens described in this document represents a major departure from traditional evaluation. Implementing it will take more work, but it is worth the effort. Evaluators who undertake an evaluation that considers race, equity, and cultural context will learn more and share more to help organizations and service providers create stronger and more equitable communities.

Tools that accompany this document include the following:

- The Culturally Responsive and Racial Equity Lens: A one-page template on which the sections of this document are based
- A Self-Assessment for Evaluators: A cultural diversity and cultural competency self-assessment checklist designed for personnel providing research and evaluation services and support to agencies, projects, and boards of directors that require such services be viewed through a lens of diversity, inclusion, and equity
- Tenets of a Culturally Responsive and Racial Equity Lens: A two-page document that provides a visual of the tenets of a Culturally Responsive and Racial Equity Lens

Recommended How-To Steps

This section of the guide speaks to each component of the lens and its importance to an evaluation.

- Evaluator
- Evaluation Process
- Diversity
- Inclusion
- Equity

Here we identify specific sections of the lens and steps that might be taken in order to successfully apply the lens to an evaluation. This process focuses first on individuals, second on the positioning of those individuals, and third on how those individuals perceive their roles and responsibilities and actually influence systems in institutions to achieve equity. It is important, however, to remember that the change sought through adaptation of the culturally responsive and racial equity lens will more than likely happen over time and not in a mere one- or two-year implementation cycle. The lens represents a tool for change; the social investments represent the instruments to actualize change.

Evaluators

This section describes the steps to take in order for an evaluation team to be assembled in a fashion that is consistent with conducting evaluation through a culturally responsive and racial equity lens. Development of cultural competency is an individual, personal, and lifelong journey. There are no standard beginning, middle, and ending points along the path. A rather typical expectation is, however, periodic self-reflection on one's values and how they manifest into perceptions, attitudes, and other types of judgments—prejudicial or not. If we are honest with ourselves, personal values play out in our interactions and comfort level with others (particularly those whose backgrounds are different from ours), our understanding of the cultural and environmental factors that shape the lives of others, and the needs and aspirations others may share. To assist in this process of reflection, a set of thought-provoking key questions can be found in Appendix A for use in private reflection about one's current level of cultural competence and opportunities for personal and professional growth.

Awareness of cultural differences among the priority population

In order for evaluators to make decisions that are based on the specific context of the population within which an evaluation is to take place, the evaluators need to take steps to understand the specific culture of that population. Those steps can include:

- Learning about the priorities and preferences of the culture and considering how those priorities are or are not reflected in the priorities of the project or program being evaluated.
- Assessing whether there are specific ways in which a traditional evaluation approach would be a poor match for the community under consideration.
- Learning about the community (from community leaders, members of the community, other culturally competent evaluators with experience in the community, etc.) and assessing how the specific qualities of this population impact how the evaluation should be conducted.
- Considering life experiences that the evaluators do *not* share in common with the population, and thinking about how to better understand and appreciate both sets of experiences for that lack of commonality.

Diversity among evaluators

A diverse evaluation staff, rather than a homogeneous staff, allows for multiple perspectives to influence the evaluation process and findings. Evaluators can employ diverse perspectives by:

- Hiring staff from multiple backgrounds and cultures.
- Focusing on heterogeneity in life experience, culture, race, gender, ethnicity, and class when selecting who should be part of a specific evaluation project.
- Encouraging evaluation staff to apply their own life experiences and unique perspectives to the evaluation, rather than striving for standardization in perspective and approach.

Shared background/life experiences with the priority population

In order to understand the perspective of the people in the community or population that is being evaluated, evaluators should have life experiences in common with that population. Evaluators should therefore:

- Consider the typical experience of the population to be evaluated (in terms of developmental experiences, community safety, educational experiences, health status, access to health care, power dynamics, wealth, housing stability, family stability, etc.).
  - Identify areas where a member of the evaluation team has had a similar experience, and share the implications of that experience with the rest of the evaluators.
  - Attempt to extrapolate from *related but distinct* experiences. For example, a brief period of poverty might allow an evaluator to better understand the perspective of those in prolonged poverty, or difficulty in paying student loans may give a perspective on credit and debt that is similar to the perspective of the population.
- Seek information from community members when there is no common life experience between the evaluators and the population under evaluation.
- For areas where the evaluation team does not have shared life experiences with the priority population and cannot compensate for that fact, be very

conscious of these differences and how they might impact key evaluation findings.

Cultural competence training for evaluators

In order to ensure that evaluators are able to successfully receive the messages that subjects of the evaluation are sending, all members of the evaluation team should be exposed to the culture of the population relevant to the evaluation, through conversation, personal development, and multicultural training. Evaluators should:

- Learn, through training, about how to understand and work with people whose culture differs from their own.
- Affirm fairness in their work so that those being evaluated are valued and encouraged to be successful.
- Shift thinking away from a focus only on sameness and treating everyone identically to a focus on treating everyone appropriately and accommodating their differences.[2]

Personal awareness of cultural frameworks, assumptions, and biases

Being aware of one's own culture, biases, and stereotypes may help evaluators better comprehend their feelings about and understanding of other cultures. Training and conversations on appreciating differences and on multicultural issues are recommended regardless of previous training and experiences. In order to minimize the impact that individual experiences, assumptions, and biases have on the evaluation, all members of the evaluation team should:

- Consider whether any facet of their own background makes them ill-suited to properly interpret ideas, wants, and needs of the relevant population.
- Honestly assess whether there are any groups with whom they have had a negative experience or about whom they have internalized any biases. If so, take steps to compensate so that those factors do not impact the evaluation.

[2] Rosalie Silberman Abella, *Equality in Employment: The Report of the Commission on Equality in Employment* (Ottawa, Canada: Supply and Services Canada, 1984).

- Assess whether the requirements of this type of evaluation challenge their professional experiences and social status in a way that makes them unable to deliver a quality product based on their standards.
- Assess whether they have overcome (or failed to overcome) any challenges that members of the priority population face, and if so, consider whether that history makes them likely to either overweigh or underweigh the difficulty of that challenge or circumstance.

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Evaluation Process (Design and Approach)

Priority population input in evaluation design and the decision-making process

Before establishing evaluation designs, evaluators should seek priority population input relative to the purpose, goals, objectives, indicators, and impacts that they think might be important (which may not match the impacts toward which a project is working). This should employ one or more of the following methods:

- Interviews with community leaders
- Focus groups with members of the community
- Open community meetings to discuss the project and proposed impacts
- Seek help from evaluators who have done historical work in this community

These methods should allow evaluators to include the priority community's perspective while establishing an approach to the evaluation, rather than only seeking community input on findings at the end.

Interview and survey instrument development appropriate to participants' culture

Evaluators should ensure that instruments used in the evaluation are appropriate for the culture of the people of whom the questions are being asked. To accomplish this goal, the following approach may be useful.

- Use an existing instrument that has previously been vetted as appropriate to the participants' culture.
- Seek help from evaluators who have focused on cultural differences in their work.
- Seek help from community leaders regarding the structure, intent, and language of all instruments to be used in the evaluation.
- Ensure that all instruments are written in the language appropriate for the priority population being served.

- Ensure that instruments are fully responsive to the needs, conditions, history, and other complexities of the priority population.

Identification of those who conduct interviews, focus groups, etc.

There are two critical considerations in selecting staff for interviews, focus groups, and other data-collection efforts:

- In the context of cultural competence, shared experiences with the priority population, knowledge about the population, and awareness of biases, evaluators should identify which members of the evaluation team are best suited to conduct interviews and focus groups and to participate as observers: Who will be best able to fully understand the context and nuances of responses?
- Evaluators should consider which members of the team will make the respondents most comfortable so that they will share the most accurate information. Evaluators should be aware of some of the possible verbal and nonverbal nuances of the program participants.

Training in the use of instruments

Applying traditional research methodologies from the context of the evaluator's culture and personal experiences may not be culturally appropriate for the priority population.

- The instrument must be culturally sensitive to elicit accurate and comprehensive responses from interviewees.
- The instrument must place critical importance on the lives of the priority population.
- The instrument must lend itself to uncovering or discovering the impact of the investment on the priority population.

Interviewer(s) knowledgeable about verbal and nonverbal nuances of the priority population

Verbal and nonverbal nuances are about differences. Interviewers must understand the basic verbal and nonverbal nuances of the priority population.

The way people talk (loud or soft) and its interpretation, posture, standing or sitting, eye contact (glances or direct), dress, body language, and differences in the meaning of words are all areas that could cause misunderstandings depending on the culture of the people being served.

- Understand that knowledge and values are culturally and socially filtered through the interviewer.
- Understand when assumptions and biases may appear concerning an individual's language, neighborhood, and appearance (i.e., clothing, physical appearance, and use of language) and how to recognize and address them.
- Understand and/or recognize verbal and nonverbal cues from the priority population.
- Listen intently to responses and be aware of voice tones, hand movements, and emotional changes. Interviewers should follow up with clarifying questions when unsure of the meaning of an initial response.

Evaluation questions posed and recommendations issued around racial equity

In order to fully embed the culturally responsive and racial equity lens into the evaluation process, evaluators should:

- Pose evaluation questions about diversity, inclusion, and equity.
  - The issues about diversity, inclusion, and equity included in the orange sections of the template on pages 20 and 21 are a good starting point for questions to ask.
  - Evaluators should also develop questions that are driven by the specific investment being evaluated and the context in which it operates.
  - It is important that these be treated as fully embedded research questions that require significant analysis, not as added-on questions to be quickly answered.
- Issue recommendations about diversity, inclusion, and equity, such as:
  - Ways in which access to resources and/or services could be broadened for underserved populations.
  - Ways to improve the extent to which resources and/or services are culturally responsive and meet the needs of the populations being served.

- Possible improvements to the equity of service delivery.
- Systemic issues (positive or negative) that should be replicated or that ought to be changed.

For an evaluator, the process of ensuring that diversity, inclusion, and equity are embedded into the evaluation should start with a review of the language contained in the original grant award. What are the stated objectives of the grant? What outcomes are expected? What will a successful outcome look like? Having concrete knowledge of what the changes should be before the data-collection process begins will better inform the evaluation process moving forward.

Diversity (Grantee Attributes)

Diversity and multicultural consciousness of governing body

From a culturally responsive framework, responsible governance is more likely when individual board members share a common background or understanding with the priority population, are culturally competent, and/or are cognizant of the historical nature of disparities in the related field and are willing to be deliberate in breaking this cycle.

In order to assess the cultural strengths of a board, evaluators must become acquainted with:

- The proportion of board members who share common backgrounds with the priority racial/ethnic populations and who reflect social, cultural, professional, geographic, and, perhaps, political diversity.
- The extent to which the board has a clear understanding of how racism manifests itself in the organization and the broader community, and how it impacts the services provided by the organization and the people who receive the services.
- The experience of any board members who have had cultural competency training.
- The existence of any significant power differences, exclusionary behavior, intentional or unintentional slights, or favoritism.

Diversity of personnel

Similar descriptors of an ideal governing body apply to an ideal staff complement. While the board typically sets policy, the staff are responsible for implementation and are considerably more likely to interact with the priority population. Accordingly, affinity with community participants, or lack thereof, is likely to manifest in positive or negative ways and be more evident through staff actions. Evaluators should:

- Assess what efforts the organization has made to recruit professional, technical, and support staff who have some knowledge of and appreciation for people of different cultures and social standings. This initial knowledge

and support for differences enhanced with training is more likely to produce a staff that is racially and culturally prepared to engage priority populations in an unbiased manner.

- Determine the level of cultural competency of individual staff members, and note the history of multicultural training opportunities that the organization has provided.
- Gauge the level of diversity present within the organization.

Organizational structure (demographics of hierarchy)

At issue is how diversity is played out in the decision-making structure of the organization. Two primary stereotypical power dynamics in the workplace are male over female dominance and that of white people over people of color. It is important for evaluators and program operators to:

- Assess what demographics are in play in the chain of command, or hierarchy, of the organization; document any problems that are observed; and recommend appropriate changes. Both the formal power structure (i.e., whether there is diversity at the management level) and the informal structure (i.e., whether members of some groups are typically not listened to, regardless of formal position) are important in this assessment.
- Consider whether organizational decision making is conducted so that all ideas are encouraged and listened to and the work environment is welcoming and inclusive.
- Determine the degree to which diversity and inclusion are present and valued in the decision-making process in the organization.

Cultural competence of board and staff

The ability to interact effectively with people of different cultures can ensure respect, understanding of the differences inherent across cultures, and awareness of cultural traditions and norms that may vary from group to group. Training can assist in identifying personal biases and stereotypical thinking. This awareness can be gained and applied to distinguishing languages, idioms, food, dress, worship, gender relations, response to sexual orientation, and other issues across cultures. Some cultural realities and norms may require accommodation, such as language interpreters, accessible office and meeting sites, etc. What is

respectable and customary for one group may be questionable or appear suspicious and not forthcoming to another. Evaluators should:

- Assess whether the board and/or staff have received multicultural awareness training.
- Learn what steps, other than training, the organization has taken in order to be culturally competent.
- Assess the curriculum and delivery method of the training received by board and staff.
- Review the processes used to increase the cultural competency of new hires.

Staff understanding of priority populations

Professional, technical, and cultural competency are requisite to ensuring quality work that promotes structural change and long-term impact, regardless of the type of initiative or the priority population to be affected. The cultural competency and kinship of staff with their priority population can influence program participation and program quality. Evaluators should:

- Familiarize themselves with, and therefore understand, the nuances of the priority population of the investment being evaluated by reviewing any current data, reports, and observations regarding that population.
- Arrange community meetings, focus group discussions, or conversations with residents of the priority community.
- Set up opportunities to learn in safe settings for group discussions, social events, community dinners, etc.

Extent of grantee's previous racial equity work involving diversity, inclusion, and equity

If there has been no racial equity work involving diversity, inclusion, and equity, this section should focus on the extent to which the organization strengthened those areas or learned more about them to conduct this work.

Ideally, an organization addressing an issue of equity would have previous experience collaborating with other community organizations and leadership in resolving inequities, as well as experience collaborating with others in

determining sustainable solutions to remove systemic barriers, including efforts to promote and support racial healing. Evaluators should:

- Determine the organization's prior involvement in equity and/or social justice work.
- Identify inequities or social justice challenges faced by the organization and determine whether these challenges are fundamental to the organization's establishment, have shaped all or some of the previous work of the organization, or were motivation for the organization to seek funding.
- Determine the organization's climate and culture regarding support of and commitment to a diverse, inclusive, and equitable work environment.
- Examine the steps the organization has taken to invest in increasing staff competency in the areas of equity and cultural differences (in contrast to, for example, pursuing a grant with equity as an expected outcome without actually expanding capacity to achieve equity).
- Provide assistance in assessing the organization's capacity to do its work through a culturally responsive and racial equity lens and suggest implementation strategies to strengthen these capabilities.

Extent to which a commitment to diversity is embedded in the organization's day-to-day practice

It is common for an organization to espouse a commitment to diversity, inclusion, and equity by including key words in its mission, vision, and value statements; ensuring that visuals on the organization's Web site and in its brochures represent diversity; and holding periodic cultural fests for staff members to enjoy the cuisine of varying cultural groups. The true mark of infusing and embedding these important principles in day-to-day practice comes when every staff member, regardless of level or type of responsibility, is working to understand why and how to apply the principles to all aspects of their work and decision making. It is critical for evaluators to establish the extent to which the grantee organization truly engages in these principles. Evaluators should examine:

- The extent to which racial equity concepts are embedded into the policies and procedures that govern the operations of the agency.

- The extent to which the agency has participated in formal cultural competency training for staff and the governing body. Determine additional training and staff development needs as necessary.
- Determine how this internal commitment to cultural competency translates to clients, customers, and the community.

The diversity and impact of community context

Before working in a community, an evaluator should have a sense of the complexities that exist in the targeted areas. For example, an evaluator should have a sense of social and governmental supports and collaboration in providing services to the priority population and the overall socioeconomic health of the community. As much as possible, evaluators should understand the realities and challenges to the daily lives of the priority population based on political positioning, leadership, power dynamics, peer agency coordination, etc. These conditions and more could influence the success of an investment and the outcomes continuing, discontinuing, or expanding support based on evaluation results and findings. Many community factors should be taken into account when evaluating philanthropic investments using the culturally responsive and racial equity lens. Some of these factors need to be considered in the design of the initiative. If issues of education, unemployment, health, and other social and economic conditions are not considered, focus on diversity, inclusion, and equity in all probability will be diminished.

Evaluators should:

- Consider community conditions that might affect project outcomes, both positively and negatively, before project outcomes are determined.
- Meet with other agencies that are providing similar services to discuss their successes, issues, problems, or concerns.
- Assess whether similarly focused agencies have formed coalitions.
- Find a community with comparable conditions and demographics in which to conduct comparative research and analysis.

Community/Civic Engagement and Racial Healing (Inclusion)

How did logistics and execution of activities take into consideration the community and cultural context of the priority population?

Communities can differ from one another in many ways. Some differences impact what a community needs; others impact the ways in which efforts to achieve change can be conducted. Better results should be expected when activities are uniquely designed for the community in which they are conducted than for activities that follow a generic model with no adaptation to local conditions. Following are some concepts that should be of interest to evaluators. Evaluators should:

- Assess whether local demographics, socioeconomic factors, cultural factors, and other attributes of the community played a role in the organization:
  - Defining project objectives.
  - Establishing implementation details and strategies.
  - Proposing social change that might impact social inequities.
- Identify and assess the extent to which community stakeholders were actively involved in the evaluation process. Types of stakeholder involvement include:
  - Providing input on project goals and objectives.
  - Reviewing the original grant proposal.
  - Offering information on community context.
  - Assisting with the development of research approaches.
  - Assisting with the selection of evaluators/evaluation firms.
  - Suggesting ways to ensure that prospective participants know about the project and that no accessibility issues hinder participation.
  - Helping to identify project results and shape findings and recommendations.

Considerations for Conducting Evaluation Using

Cultural Competence:
A skill set that comes from personal experiences within a given community and/or from structured learning experiences that ensures acceptance, appreciation, understanding, and responsiveness by evaluators regarding value, practices, preferences, attitudes, and behavior of this community; and that inform the entire evaluation process.

DIVERSITY

EVALUATORS

- Awareness of cultural differences among the priority population
- Diversity among evaluators
- Shared background/life experiences with the priority population
  - Including class/SES-based cultural competency
- Cultural competence training of evaluators prior to or during this evaluation
- Personal awareness of cultural frameworks, assumptions, and biases

EVALUATION PROCESS

- Priority population input in evaluation design and the decision-making process
- Interview and survey instrument development appropriate to participants' culture
- Identification of those who conduct interviews, focus groups, etc.
- Training in use of instruments
- Interviewer(s) knowledgeable about verbal and nonverbal nuances of priority population
- Evaluation questions posed and recommendations issued around racial equity

GRANTEE ATTRIBUTES
(via intake process)

- Diversity and racial consciousness of governing body
- Diversity of personnel
- Organizational structure (demographics of hierarchy)
- Cultural competence of board and staff
- Staff understanding of priority populations
- Extent of grantee's previous work involving diversity, inclusion, and equity (if none, extent to which the organization strengthened those areas or learned more about them to conduct this grant work)
- Extent to which equity is embedded in the organization's day-to-day practice, not just in print
- Integration of community context

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a Culturally Responsive and Racial Equity Lens

Issues that must be part of the evaluation of each grantee in order for the process to be conducted through a diversity-inclusion-equity lens; to acknowledge the persistence of inequities in America due to historical institutional racism and discrimination; and to strategically account for these inequities in grant project design, implementation, and evaluation.

INCLUSION

COMMUNITY/CIVIC ENGAGEMENT
RACIAL HEALING

- How did logistics and execution of activities take into consideration the community and cultural context of the priority population?
- What population was targeted by the grantee, and how was eligibility for services determined?
- How did the grantee work to avoid disparities in the services received by different racial or ethnic groups?
- How was cultural competency ensured among grantee staff working with the priority population?
- Did the project build upon or incorporate previous inclusion efforts in the community, and if so how?
- If changes are intentionally put in place to achieve greater "equity," are these changes tracked to show equity in service delivery, participation, and quality of services for the priority population?
- Have diversity, inclusion, and equity been the primary focus of any previous projects that the grantee has implemented?
- In what ways has the grantee organization informed itself about the cultural, religious, SES, and other differences comprising the priority population?

EQUITY

ADVANCING TOWARD THE REALITY OF
RACIAL EQUITY IN AMERICA

- Who and what was changed or affected, and how?
- As evident at close of project, are outcomes and any differences in services intended or unintended?
- What can be seen using a culturally responsive and racial equity lens that might not seem relevant without its use?
- Did the provision of services have a different long-term impact on various cultural groups after the conclusion of service delivery? How was impact assessed?
- Were there unintended changes or consequences because of cultural or ethnic issues/context?
- Was the importance of access to services by various constituencies considered in developing delivery strategies, and were the most-in-need groups able to receive services?
- What are the systemwide changes that ultimately resulted from this program?
  - Are these results as expected?
  - Are there unintended consequences?
  - Is there evidence that more changes are likely?
- Did the grantee's work affect race or intergroup relations, institutional changes, equity, socioeconomic status, or disparities in outcomes in the target community? Is there evidence that more changes are likely in the future?
- Were there disparities in the services received by different racial or ethnic groups?
- Are evaluators instructed in advance of data collection to use the gathered information to propose findings and offer longer-term options about access to services; equity in service delivery, participation, and quality of services for the priority population; and the future of programs such as this grant-funded one, to address historic and systemic challenges faced by the community?

Version of April 2015

What population was targeted by the grantee, and how was eligibility for services determined?

Interventions may be targeted to individuals in need, based on, for example, gender, age, race/ethnicity, socioeconomic status, education, disability, sexual orientation, and/or geographical location. Furthermore, participants may volunteer or be selected. Within these contexts, evaluators should:

- Consider how the case was made for a specific demographic to receive targeted intervention and whether or not there was adherence to these criteria.
- Document whether there was transparency regarding the determination of and communication about eligibility criteria.
- Assess whether eligibility cutoffs had strong impacts on any one group.

How did the grantee work to avoid disparities in the services received by different racial or ethnic groups?

If a program designed to be consistent, standardized, and universal across participants, in fact, provided differing services to, for example, men and women, that would be a significant flaw in program design. It would be equally problematic if a program provided disparate services along any other axis of difference. It is, therefore, important to assess the steps that a grantee took in order to ensure that the services provided to differing groups were equal.

- Evaluators should determine whether or not there were any disparities in services delivered, specifically:
  - The nature and impact of any disparities.
  - Strategies undertaken by the agency to avoid such disparities.
  - Strategic approaches developed by the agency to alleviate these and other disparities in the future.
  - Changes necessary to ensure equitable services for all participants.
- If any disparity is found, evaluators should review decision points to determine:
  - Where/when the disparity may have occurred.
  - Individual or group actions that may have contributed to it.
  - Program policy or decision that may have prompted disparity.

  - How disparity was addressed and/or recommended strategies for addressing this issue.
- Decision points along the evaluation process for eliminating disparities may include, but are not limited to:
  - Project design.
  - Determination of eligibility for participation.
  - Initial communication about the project.
  - Screening and intake.
  - Assignment of specific activities to individual organization staff members.
  - Participants' advancement through the program or services.
- Evaluators must ascertain if grant objectives called for the same services to be delivered to all project participants or equitable services to varying participant groups based on interventions most appropriate to the respective cultural backgrounds. The key here is that the quality of service delivery should be the same for all, regardless of the nature of the services and how they might have been delivered.

How was cultural competency ensured among organization staff working with the priority population?

For project efficacy, it is imperative that grantee staff have or acquire a level of cultural competency in order to provide equitable services to a priority population. This process of learning should be continuous and relevant to the inherent cultural factors of the community being served. Evaluators should:

- Assess the cultural environment of the organization, as well as the cultural competency of individual staff and board members.
- Note the frequency with which cultural competency-related activities take place, the benefits of the specific training curriculum used, and trainer effectiveness.
- Provide feedback to the funder on the extent to which cultural competency experiences shared among governing board and staff facilitates enhanced project success and sustainability among project results.

Did the project build upon or incorporate previous inclusion efforts in the community, and if so how?

It is probable that other organizations in the community serve the same priority population, and maybe even with similarly defined objectives. Accordingly, evaluators should familiarize themselves with:

- The communications networks established between organizations with shared missions.
- Partnerships established to facilitate inter-institutional cooperation.
- The capacity of the local community to be civically engaged in eradicating systemic barriers to equal opportunity and the capacity to engage in effective healing around racism.
- A sense of the history of citizen engagement in past community initiatives.

Evaluators should note how the organization is:

- Communicating to its client groups, stakeholders, organization peers, and others.
- Keeping its commitment to social justice, elimination of inequities, civic engagement, and racial healing.
- Perceived as a credible organization throughout the community in espousing these stances.
- Seen for having demonstrated success at making strides toward creating a more just and equitable society.

Advancing Toward the Reality of Racial Equity in America (Equity)

Who and what was changed or affected, and how?

It is relevant to a standard evaluation as well, but in conducting an evaluation through a culturally responsive and racial equity lens, the same data should be examined while paying attention to differences in the outcomes for different groups. Were cultural differences between interviewer and interviewee considered? Were culturally specific interventions used in the implementation of services? Was change or impact on the grantee a result of consideration of cultural difference? Was there communitywide or systemic change observed as a result of the investment? If different interventions were designed and delivered for different groups, how was each group changed or affected and how was the organization service delivery changed or affected? After looking at the systemic and programmatic changes that occurred, what stands out? Evaluators should:

- Identify the targeted program participants and assess the extent to which they were impacted by the services. Both long-term and short-term positive or negative impacts should be identified.
- Conduct interviews, focus groups, or a survey to assess the benefits of the investment to the intended populations.
- Determine if any systemic changes occurred in the priority community as a result of the services provided. Were changes positive or negative? Were they expected or unexpected?

What can be seen using a culturally responsive and racial equity lens that might not seem relevant without its use?

A culturally responsive and racial equity lens attempts to fully describe and explain the context of the social investment being evaluated. Culturally responsive evaluators should be aware of cultural nuances, including voice inflections and body language, that would be noticeable to a cultural insider but go unnoticed from someone unfamiliar with the culture. Those who use this lens

tend to honor the cultural context in which an evaluation takes place by bringing needed, shared life experience and understanding to the evaluation tasks.[3]

This tool provides some questions that should be answered in order to conduct an evaluation through a culturally responsive and racial equity lens. However, in any specific evaluation, there will be other questions and issues that are relevant to assessing the equity impacts of the project. It is incumbent upon evaluators to identify for themselves those issues that are important in an evaluation using a culturally responsive and racial equity lens that would not have seemed important without the lens.

Did the provision of services have a different long-term impact on various cultural groups after the conclusion of service delivery? How was impact assessed?

Standardization of service delivery will be insufficient if those services do not result in the same long-term outcomes for members of different groups. In order to consider long-term effectiveness and equity, it is important to look at longer-term outcomes. Evaluators should:

- Assess what groups from the community were served.
- Determine if differences existed in the results of services provided to various cultural groups. If so, evaluators must assess why this was the case. That is, did culture, language, or access impact the long-term results of services?
- Assess whether the context and culture of participants was considered at various stages of the social investment development.
- Determine if cultural, racial, or equity issues impacted the process and/or results of an investment.

[3] Henry Frierson, Stafford Hood, and Gerunda Hughes, "Strategies That Address Culturally Responsive Evaluations," in *The 2002 User-Friendly Handbook for Project Evaluation* (Arlington, VA: The National Science Foundation, 2002), 63.

Was the importance of access to services by various constituencies considered in developing delivery strategies, and were the most-in-need groups able to receive services?

Access is a critically important issue that is often overlooked in program design. People may lack access to programs or support for which they are technically eligible if, for example, it can only be taken advantage of during work hours, or if it cannot be reached via public transportation. Because the ramifications of access are so significant, it is important to evaluate the extent to which access was considered in program design. Evaluators should:

- Think broadly about whether the program's implementation failed to provide access to any constituencies that would have benefitted from the investment.
- Carefully consider cutoff points (e.g., maximum income to be eligible for a service) and who is excluded by those cutoffs.
- Determine whether there was collaboration between stakeholders and organizations that would have taken into consideration access and delivery strategies particular to the most-in-need constituents.

What are the systemwide changes that ultimately resulted from this investment?

This is a question that has relevance both in traditional evaluation—assessing whether systems change occurred—and in evaluation using a culturally responsive and racial equity lens. Since many issues of inequity, power, and access are embedded in systems, systemwide changes are an important sign of and facet of progress.

This question is intended to examine the longer-term or secondary impacts and outcomes from the investment, as distinct from the outputs and individual-recipient outcomes. The intent is to evaluate organizations' work across multiple venues

Systems change may include progress in:
Mindsets
Services
Connections
Policies/practices
Resources
Power
Diversity in leadership
Learning
Race relations

or systemically to understand if systemwide change has occurred. Systemic change offers an opportunity to enact change while moving beyond thinking about individuals and individual organizations, single problems, and single solutions. It entails thinking about systems—policy systems, education systems, social service systems, information systems, and technology systems.

Systemic change is a cyclical process in which the impact of change on all parts of the whole and their relationships to one another are taken into consideration. In the contexts of schools, it is not so much a detailed prescription for improving education as a philosophy advocating reflecting, rethinking, and restructuring.

"Essentially, systemic change entails working with stakeholders throughout the system to:

- Create a vision of what you want the system to look like and accomplish.
- Take stock of the current situation.
- Identify strengths and weaknesses of the current system in light of the vision.
- Target several priority items for improvement.
- Establish a plan for addressing these priority items and for measuring success.
- Assess progress regularly and revise actions as needed.
- Take stock again and use feedback to revisit vision and begin cycle again when the action cycle is completed."[4]

Evaluators should determine the extent to which any systemwide changes, intended/proposed or unintended, were a result of this investment.

- Are these results as expected?
- Are there unintended consequences (positive or negative)?
- Is there evidence that more changes are likely?

[4] "What Is Systemic Change?" National School Boards Association, last updated February 21, 2003, accessed October 3, 2012, http://www.nsba.org/sbot/toolkit/whatsc.html.

Systemwide changes often take time and begin to occur even after funding has ended. Of the results and consequences, expected or not, which, if any, suggest future systemic change, especially as may lessen equity gaps?

Did the grantee's work affect race or intergroup relations, institutional changes, equity, socioeconomic status, or disparities in outcomes in the priority community? Is there evidence that more changes are likely in the future?

Regardless of whether an investment specifically targeted equity, it may have had an impact—positive or negative—on existing disparities and the race-relations climate in the priority community, or even more broadly in the area in which the priority population lives. In order to employ a culturally responsive and racial equity lens, the broad-scale impact on equity gaps and other issues must be part of what is evaluated.

- In part, the question is whether or not the organization has the strengths, commitment, and skills to effect and sustain long-term outcomes that have a desirable impact (i.e., eliminating equity gaps) on the priority community. Possible questions through which evaluators can address this issue include the following:
  - What was the level of satisfaction among program participants, and were there any significant differences from levels of satisfaction among other agency clients?
  - Were any changes observed whereby it became more difficult for the priority population to obtain equitable services?
  - Were any gains or improvements noted in the quality of life of participants as a result of the investment and its accomplishments?
  - Were any structural or policy changes made in the community institutions?
  - Were benefits with intrinsic value identified, even though they could not be quantified?
  - Are any social costs likely to be diverted by virtue of a decrease in disparities addressed by this program?
  - Was there evidence of a paradigm shift whereby participants had an opportunity to discover their own individual and collective strengths and

their ability to motivate and help one another and to have an actual impact accordingly? In other words, was civic engagement in play during the program? It is important to assess the presence of participant engagement throughout the life of a program, not only near its conclusion.

- Evaluators must identify and assess any aspects of the grant that specifically identified/emphasized concerns around issues involving institutional, structural, and/or individual racism. Did the grant specifically consider the socioeconomic status of its constituents?
- Evaluators must identify lessons learned and assess how the concerns may be addressed in future funding cycles.

Were there disparities in the services received by different racial or ethnic groups?

A social investment is designed and administered to accomplish stated goals and objectives and to improve the condition or situation of the target client population through program services. Under no circumstances should a social investment result in increased equity gaps and/or a situation whereby the targeted group finds itself less well off than before the interventions. The next level of inquiry should be to determine whether the interventions were marketed to, staffed by, or delivered to different racial/ethnic groups in any ways that had disparate impact. Evaluators should:

- Look at disaggregated data to see whether different racial or ethnic groups received different interventions.
- Assess whether the culture, language, or race was considered in the development of the social investment.
- Determine if there were members of the community that were not served by the social investment but were intended to be served.
- Determine any factors that may have contributed to the disparities.
- Interview random community participants to determine if they were or were not served by the grant.

Appendix A: Key Questions for Self-Assessment

This set of key questions is not to be completed by any individual evaluator and/or submitted to any other second party. Rather, it is intended as a reflective and thought-provoking tool for consideration by evaluators who may or may not have previously incorporated cultural responsiveness in their evaluation processes in any significant way in the past.

There is no letter grade or numerical value attached to any of these questions. There may be other questions important to reflect upon, as well. Hopefully, however, these questions can be used on a personal basis to identify which, if any, parts of your evaluation process might benefit from specific or new attention. This will be particularly true if you are switching from a more traditional evaluation format to an evaluation process conducted from a culturally responsive perspective, from start to finish.

EVALUATION PROCESS

1. At the start of your evaluation processes, which of the following do you routinely do?
   - Involve the priority population in some or all of the evaluation steps
   - Take race/ethnicity into account in designing the survey instrument(s)
   - Determine criteria for identification of interviewers
   - Decide if interviewers need any cultural competency training in order to correctly use the interview instruments
2. Do you find yourself changing the way you speak, the words you use, your tone of voice, or other things based on verbal and nonverbal cues from the investment recipients whom you are interviewing or with whom you are conversing?
3. Do you ever consider long-term, sustained social change that might be possible by the organization that you are evaluating, even if the organization doesn't realize this potential?

DIVERSITY

4. At the start of your evaluation processes, which of the following do you routinely review and consider as to their impact on evaluation results and outcomes?
   - Demographic background of the organization's governing board
   - Shared experiences between the governing board and the majority of recipients of the social investment
   - Demographic background of the organization's staff complement
   - Shared experiences between the staff complement and the majority of recipients of the social investment
   - Any hierarchical dynamics between and among the governing board and the staff that impact project success and evaluation outcomes and results
   - Organization's historical stance and/or service delivery around equity
   - Community context and dynamics
   - Specific demographic or underserved population targeted by the organization

INCLUSION

5. Do you routinely research the SES of the grantee community as an early step in the evaluation process?
6. Do you familiarize yourself with the cultural behavior and needs of the priority population and, for example, accommodate for language differences prior to beginning an evaluation process?
7. On a routine basis, do you disaggregate data along demographic lines in order to adapt your evaluation process to the race and culture of social investment recipients?
8. Before you begin your evaluation process, on which of the following do you seek clarity?
   - Demographics and other characteristics of the local community
   - Logistics and execution of activities taking into consideration the community and cultural context of the priority population
   - Determination of eligibility criteria

EQUITY

9. In interpreting relevant data and other information, which of the following do you specifically check to determine impact, if any, on evaluation results and outcomes?
   - Outcomes and differences, whether intended or unintended
   - Who or what is changed or affected
   - Any unintended changes or consequences because of cultural or racial/ethnic issues/context
   - Systematic changes
   - Effect on race relations
10. If the social investment is ongoing, how critical is it for the evaluation results to provide guidance to the grantee about how to assess differentials by demographic group and how to make changes/corrections in the future?
11. In interpreting relevant data and other information, which of the following do you routinely integrate into your evaluation results and outcomes?
   - Accessibility of program services to the priority population
   - Recommendations to facilitate long-term impact
   - Recommendations to promote systematic changes
   - Effects on race relations in the local community
12. From your experience and perspective, will this new diversity, inclusion, and equity lens be helpful to you with future evaluation processes?

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Considerations

for Conducting

Evaluation

Using a Culturally Responsive and Racial Equity Lens

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