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## Raising the Bar — Integrating Cultural Competence and Equity: Equitable Evaluation — With 2024 Prologue

Jara Dean-Coffey  
*jdcPARTNERSHIPS*

Jill Casey  
*jdcPARTNERSHIPS*

Leon D. Caldwell  
*Equal Measure*

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## **Raising the Bar — Integrating Cultural Competence and Equity: Equitable Evaluation – With 2024 Prologue**

### **Cover Page Footnote**

Editor's Note: This article, first published in print and online in 2014, has been republished by The Foundation Review with minor updates.

# Raising the Bar — Integrating Cultural Competence and Equity: Equitable Evaluation – With 2024 Prologue

Jara Dean-Coffey, M.P.H., and Jill Casey, B.S., jdcPARTNERSHIPS; and Leon D. Caldwell, Ph.D., Equal Measure

**Keywords:** *Evaluation, equity, philanthropy, foundations, capacity building*

## Prologue

by Jara Dean-Coffey, M.P.H.

In 2011, the American Evaluation Association adopted a Statement of Cultural Competence.<sup>1</sup> “Raising the Bar” was published in 2014 — a time when equity was not as frequently evoked as it is now. The research that led to that article stemmed from a foundation wanting to know how others were addressing equity — racial equity in particular — in their evaluation approach.

In hindsight, the question rested on two assumptions: that the answer is out there, and that there is a singular and preferred way to do “it,” whatever “it” is. Regardless of the intention, the question and the assumptions that underlie it reinforce a problem/fix mindset omnipresent in the U.S. settler-created philanthropic industrial complex. Equitable Evaluation as offered in our article did as asked: Do this. It presented a capacity-building frame to fix the problem of a lack of attention to equity.

For me, a deeper curiosity was sparked: How did we (and who were, and remain, the “we”) get here — a place where evaluation falls short? Why does evaluation not embrace the complexity of our reality and the multiplicity of the human experience as default? What might a different evaluative practice hold as core? And

## Key Points

- Whether implicit or explicit, social justice and human rights are part of the mission of many philanthropies. Evaluation produced, sponsored, or consumed by these philanthropies that doesn't pay attention to the imperatives of cultural competency may be inconsistent with their missions.
- The American Evaluation Association's Statement on Cultural Competence provides those who produce, sponsor, and use evaluation an opportunity to examine and align their practices and policies within a context of racial and cultural equity and inclusion. The use of such a lens is paramount when evaluating a program whose goals touch on issues of equity or inclusion.
- This article seeks to open a discussion of how philanthropy can use an equitable-evaluation approach to apply the principles of the AEA statement, present the concept of equitable evaluation alongside an approach for building equitable-evaluation capacity, and apply equitable-evaluation capacity building to philanthropy.

in what ways could this be an entry into how we co-create knowledge in the 21st century?

This line of inquiry produced, several years later, the *Equitable Evaluation Framework™ framing paper*. Equitable Evaluation Initiative. [https://static1.squarespace.com/static/5a73584b8fd4d2dbcaa08405/t/5fbd0633c02f22b9dc97d37/1606266980696/Equitable+Evaluation+Framework+Framing+Paper\\_200904.pdf](https://static1.squarespace.com/static/5a73584b8fd4d2dbcaa08405/t/5fbd0633c02f22b9dc97d37/1606266980696/Equitable+Evaluation+Framework+Framing+Paper_200904.pdf)

<sup>1</sup> See <https://www.eval.org/Community/Volunteer/Statement-on-Cultural-Competence-in-Evaluation>

<sup>2</sup> Center for Evaluation Innovation, Institute for Foundation and Donor Learning, Dorothy A. Johnson Center for Philanthropy, & Luminare Group. (2017, July). *Equitable Evaluation Framework™ framing paper*. Equitable Evaluation Initiative. [https://static1.squarespace.com/static/5a73584b8fd4d2dbcaa08405/t/5fbd0633c02f22b9dc97d37/1606266980696/Equitable+Evaluation+Framework+Framing+Paper\\_200904.pdf](https://static1.squarespace.com/static/5a73584b8fd4d2dbcaa08405/t/5fbd0633c02f22b9dc97d37/1606266980696/Equitable+Evaluation+Framework+Framing+Paper_200904.pdf)

With It? Equity and Philanthropic Practice.”<sup>3</sup> The first offers an initial set of grounding principles for evaluation, while the latter shares the history of the relationship between evaluation and philanthropy. Both informed the purpose of the Equitable Evaluation Initiative,<sup>4</sup> which is to seed a field of Equitable Evaluation Framework (EEF)<sup>5</sup> practitioners advancing equity; expanding notions of objectivity, rigor, and validity; and embracing complexity. Evaluation was an entry point. The practice of EEF was always intended to evolve how we co-create knowledge and has become a robust emergent praxis for present times currently in the sustain and maintain phase as a field of practice.

Definitions and decisions that predate all of us shape our belief systems. We have a responsibility as those here now to determine if they still serve our current context, align with our values, and are relevant to our purposes. And if not, then it is for us to evolve them and find different ways (some new and some old) and to be in relationship with each other as we do so.

Some things have changed since 2014, when our article was published; others remain as they always have been on this land. I am not the same as when “Raising the Bar” was co-written with Jill Casey and Leon Caldwell. What is offered in this prologue is from my perspective, knowing that others will have theirs.

## Overview

The American Evaluation Association’s Statement on Cultural Competence (2011) serves as an impetus for introspection about why and how work is done in the social and philanthropic sectors. In particular, it provides those who produce, sponsor, and use evaluation a precious opportunity to examine and align their practices

and policies within a context of racial and cultural equity and inclusion. For philanthropy in particular, it opens the door for analysis of both the form and function of evaluation and the degree to which it forwards aims that reflect the core definition of philanthropy.<sup>6</sup>

Philanthropy has a complex relationship with evaluation (Coffman et al., 2013; Hall, 2003; Wales, 2012). For purposes of this discussion, however, three primary roles capture how philanthropy intersects with professional evaluation. They are, in order of influence:

- **Producers.** Philanthropies produce evaluations related to their investments for three reasons: to demonstrate accountability to governing bodies and other stakeholders, to measure success, and to guide quality improvement. As a producer, the philanthropic organization is invested in both the process and products of evaluation.
- **Sponsors.** Philanthropies often finance evaluation because they are interested in the change that occurred and what was learned as a result. As sponsors, they are removed from the process but invested in the product.
- **Consumers.** Philanthropies read, disseminate, and use the results of evaluations to inform their work and that of others. As consumers, they are one of the many audiences that benefit from published evaluations.

The perspectives of ethics, validity, and theory laid out in AEA’s rationale for the importance of cultural competence apply in each of these roles. Whether implicit or explicit, social justice and human rights are part of the mission of many philanthropies. Evaluation produced, sponsored, or consumed by these philanthropies that doesn’t pay attention to the imperatives of

<sup>3</sup> Dean-Coffey, J. (2018). What’s race got to do with it? Equity and philanthropic evaluation practice. *American Journal of Evaluation*, 39(4), 527–542. <https://doi.org/10.1177/1098214018778533>

<sup>4</sup> See <https://www.equitableeval.org>

<sup>5</sup> <https://www.equitableeval.org/framework>

<sup>6</sup> Merriam-Webster.com defines philanthropy as “the practice of giving money and time to help make life better for other people.” See <http://www.merriam-webster.com/dictionary/philanthropy>

**TABLE 1** Cultural Competence and Equity-Focused Evaluation

AEA Statement on Cultural Competence Essential Practices	Definition of Equity-Focused Evaluation
<p><b>Acknowledge the complexity of cultural identity.</b></p> <p>Cultural groupings are not static. People belong to multiple cultural groups. Navigating these groups typically requires reconciling multiple and sometimes clashing norms.</p>	<p>A judgment made of the relevance, effectiveness, efficiency, impact, and sustainability — and, in humanitarian settings, coverage, connectedness, and coherence — of policies, programs, and projects concerned with achieving equitable development results. It involves a rigorous, systematic, and objective process in the design, analysis, and interpretation of information in order to answer specific questions, including those of concern to worst-off groups. It provides assessments of what works and what does not work to reduce inequity, and it highlights intended and unintended results for worst-off groups as well as the gap between best-off and worst-off groups. It provides strategic lessons to guide decision-makers and to inform stakeholders. Equity-focused evaluations provide evidence-based information that is credible, reliable, and useful, enabling the timely incorporation of findings, recommendations, and lessons into the decision-making process.</p>
<p><b>Recognize the dynamics of power.</b></p> <p>Culture is not neutral. Cultural groupings are ascribed differential status and power, with some holding privilege that they may not be aware of and some being relegated to the status of “other.”</p>	
<p><b>Recognize and eliminate bias in language.</b></p> <p>Language is powerful. It is often used as the code for prescribed treatment of groups.</p>	
<p><b>Employ culturally appropriate methods.</b></p> <p>The methods and tools used for collection, analysis, interpretation, and dissemination of data are not culture free. ... Culturally competent evaluators seek to understand how the constructs are defined by cultures.</p>	

Source: Bamberger & Segone, 2011, p. 9

cultural competency may be inconsistent with their missions. Too often, the analytical framework used to assess the efficacy or effectiveness of interventions developed for vulnerable populations<sup>7</sup> lacks a racial or cultural equity lens.

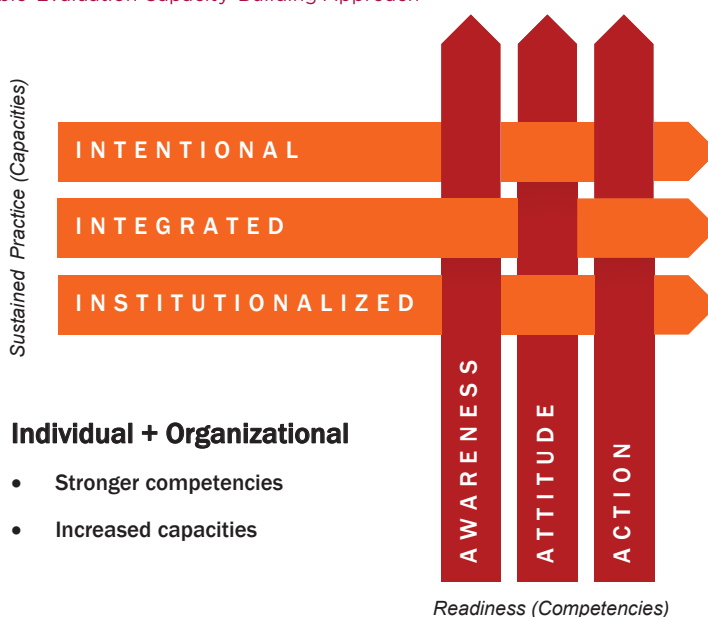
The AEA statement invites the philanthropic sector to align its evaluation functions with its programmatic mission. Because the act of evaluation is itself part of the intervention, an equity lens is paramount when evaluating a program whose goals touch on issues of equity or inclusion. Only then can evaluation and equity be properly aligned. Drawing on equity and evaluation literature and interviews with leaders in evaluation and philanthropy, this article seeks to open a discussion of how philanthropy can use an equitable-evaluation approach to apply the principles of the AEA’s statement, present the concept of equitable evaluation alongside an approach for building equitable-evaluation

capacity, and apply equitable-evaluation capacity building (EECB) to philanthropy in its producer function. The authors intend to continue this work by exploring how this framework applies to philanthropy’s consumer and sponsor roles.

### Linking Cultural Competence and Equity-Focused Evaluation

The “essential practices” laid out in the AEA statement underlie our approach to equitable-evaluation capacity building, buttressed by the description of equity-focused evaluation emerging from the analysis of international development efforts (Bamberger & Segone, 2011). (See Table 1.) The EECB approach seeks to connect culturally competent practice with a deliberate and systematic focus on equity across evaluation design, data collection, analysis, and reporting. We use the term “equitable evaluation” to recognize the act of linking cultural competence with a focus on equity across all

<sup>7</sup> The Urban Institute defines vulnerable populations as “groups that are not well integrated into the health care system [or any system] because of ethnic, cultural, economic, geographic, or health characteristics.” See [https://web.archive.org/web/20081029074326/https://www.urban.org/health\\_policy/vulnerable\\_populations/](https://web.archive.org/web/20081029074326/https://www.urban.org/health_policy/vulnerable_populations/)

**FIGURE 1** Equitable-Evaluation Capacity-Building Approach

elements of evaluation. As a capacity-building approach, we situate the equity focus and culturally competent practices within the context of an organization. In this case, that context is philanthropic organizations that produce evaluation.

### An Equitable-Evaluation Capacity-Building Approach

The first part of the EECB approach is a continuum toward adopting practices that institutionalize equitable evaluation as the norm. (See Figure 1.) It builds from 18 field leader interviews that elicited descriptions of practices, processes, and resources in terms of their potential to promote evaluation practices within foundations primarily concerned with equity. Themes that emerged from the interviews included the importance of:

- recognizing that an equity lens shapes worldview and professional practice,

- leadership commitment to the focus on equity,
- EECB building on and being relevant to current work,
- building the pipeline of evaluators to include more people of color, and
- expanding views on and skills related to the practice of equitable evaluation.

The EECB approach is further informed by the literature regarding organizational learning, culturally responsive evaluation, and philanthropy. It attempts to address myriad considerations, including individual and organizational capacities and competencies, emergence of equitable evaluation within the philanthropic sector and evaluation practice, and the frame of persistent structural racism in the United States.<sup>8</sup>

<sup>8</sup> As defined by K. Lawrence and T. Keleher (2004) in "Structural Racism" for the Race and Public Policy Conference, "Structural racism in the U.S. is the normalization and legitimization of an array of dynamics — historical, cultural, institutional, and interpersonal — that routinely advantage whites while producing cumulative and chronic adverse outcomes for people of color. It is a system of hierarchy and inequity, primarily characterized by white supremacy — the preferential treatment, privilege, and power for white people at the expense of Black, Latino, Asian, Pacific Islander, Native American, Arab, and other racially oppressed people." See <https://www.intergroupresources.com/rc/Definitions%20of%20Racism.pdf>

## The Relevance of Organizational Learning

Research regarding organizational learning recognizes the link between individual learning and organizational change. It highlights the realization that when individuals learn together, socially constructing meaning, the pace and magnitude of growth outstrips what can be attained individually (e.g., Garvin, 1993; Kim, 1995; Preskill & Torres, 1999; Senge, 1990). Given the complexity of social conditions, the long-term focus of change, and the reality that these issues often go undiscussed, EECB necessitates anticipating barriers to organizational learning (Argyris, 1990). In addition, literature and experience tell us that four important organizational principles (Gill, 2000) are essential to building equitable-evaluation capacity:

1. Organizations are systems.
2. Improving organizational processes requires enhancing and effectively disseminating knowledge.
3. Smaller-scale interventions support internal change.
4. Employees are responsible for the systems in which they work.

The EECB approach seeks to integrate these elements of organizational learning with the key practices, processes, and resources described by interviewees and in the culturally responsive evaluation literature as critical to establishing and sustaining equitable evaluation. It recognizes that philanthropic organizations operating as producers of evaluation are systems that must attend to both individual competencies and organizational capacities in order to advance an explicit understanding of and focus on equity. Weaving together individual competencies and organizational capacities strengthens the approach and the attainable results.

As Thomas (2011) and Samuels and Ryan (2011) point out, practices that recognize the

*[W]hen individuals learn together, socially constructing meaning, the pace and magnitude of growth outstrips what can be attained individually.*

complexity and multidimensionality of context, culture, and power as fundamental elements to be addressed in evaluation design and implementation are increasingly well-documented in evaluation literature (e.g., Botcheva et al., 2009; Chouinard & Cousins, 2007; Greene et al., 2004; Hood et al., 2005; Hopson, 2009; Hopson et al., 2000; LaFrance, 2004; Kirkhart, 2005; Manswell-Butty et al., 2004; Reese & Vera, 2007; Smith & Jang, 2002; Mertens, 1999; Thomas & Stevens, 2004; Thompson-Robinson, 2004). The practices within this established and growing body of literature highlight examples and explicate the perspectives of ethics, validity, and theory and the essential practices articulated in the AEA statement. For example, Hopson (1999) recognizes the potential benefit of participatory approaches, but cautions that without rethinking “the conceptual lenses through which we see and evaluate groups of color (and other marginalized groups)” (p. 447), these models fall short of their promise. Kirkhart (2013) makes the case for centering validity in “culture, context, and values” and offers nine considerations to attune evaluations to culture.<sup>9</sup> Recognizing the need for diverse perspectives and lived experiences, Hood (2000) calls our attention to the need for more evaluators of color, noting that calls for inclusion and fairness fall short if we do not expand their ranks. Thinking more specifically about EECB within foundations, the approach recognizes the call to foundations to build organizational understanding of and enter into initiatives that recognize systemic barriers and racial disparities, support the pipeline of diverse evaluators,

<sup>9</sup> For Kirkhart’s nine considerations, see Slide 20: A Culture Checklist at <https://uofi.app.box.com/s/3d1scxp5eaiy3jj7ix9dzor865u9ygw9>

**FIGURE 2** Equitable-Evaluation Capacity-Building Approach: Readiness/Competencies**Individual**

- Recognize as fundamental and “mission critical”
- Shift from personal to structural
- Address general attitudes about evaluation and its role
- Build internally on processes and practices
- Expand EE practice among grantees

**Readiness (Competencies)**

develop tools to promote a consistent equity focus, and approach each with specific organizational investment and intention (Greene et al., 2004; Millet, 2011; Villarosa, 2010). Furthermore, the EECB graphic draws upon Symonette’s point that “culture is dynamic and ever-changing” (2004, p. 96). Hence, the weaving of the continuum and the continued arrows of each strand demonstrate that this process is neither linear nor finite, but instead one in which individual competencies and organizational capacities are overlapping and ongoing in their development.

**Readiness: Individual Competencies**

The second portion of the EECB approach is an individual readiness continuum, from awareness to action. (See Figure 2.) From one point of view, it reflects an individual transformation, one that must be grounded in an individual’s cultural competency and understanding of equity. From the organizational perspective, it requires awareness of oneself in relation to others. This ability to view issues that perpetuate inequity through a structural and professional lens, as opposed to individual and personal, is vital (Powell, 2010; Quiroz-Martinez et al., 2004). The competencies that follow are not intended to reflect the full set of knowledge and skills

required by individuals to lead, manage, or produce culturally competent and equity-focused evaluations. Rather, the competencies speak to how a philanthropic organization can promote individual readiness for building organization-wide equitable-evaluation capacity.

**Awareness: Why Cultural Competence and Equity Focus Matter**

Reflecting AEA’s essential practice of “recogniz[ing] the dynamics of power” — that “cultural groupings are ascribed differential status and power” — EECB calls upon individuals to understand how race and ethnicity operate with respect to equity and how race and ethnicity intersect with other socially defined characteristics, such as sexuality, class, nationality, and age (Jung, 2010). This is no small task, nor is this awareness static and finite. Interviewees were clear that this elemental understanding is integral to progress. They were also clear that the burden of expanding organizational understanding rests not with people of color or employees from traditionally marginalized communities. This is not about exposing individual experiences; it is about developing shared recognition of structural barriers and the dynamics of power and privilege.



Fortunately, existing resources such as the Annie E. Casey Foundation's "Race Matters" toolkit,<sup>10</sup> "Structural Racism and Community Building" (Lawrence et al., 2010), and Equity in the Center's "Racial Equity Tools"<sup>11</sup> are available to assist philanthropic organizations with internal dialogues that examine the historical barriers and privileges that perpetuate disproportionality and disparity. This awareness weighs heavily on what is valued in evaluations, the methods used, and the questions asked. Therefore, philanthropic organizations must determine a course for promoting and sustaining individual competency in understanding these barriers and disparities (Leiderman, 2005; Chelimsky, 2012; Hall et al., 2012).

This is likely to require structured facilitation of what can be challenging conversations; if facilitated deftly, these conversations present opportunities for individuals to express their truth and to hear another's truth. It is the time to listen for understanding. It is not the time to apologize or to "get comfortable," but to accept that multiple truths co-exist in an organization. These conversations must encompass issues that are simultaneously individual, organizational, and systemic. Failing to address the fundamental competency of awareness perpetuates the social conditions that philanthropy seeks to change. Individuals skilled in group process design, facilitation, conflict resolution, and mediation have much to add in these situations.

Questions related to addressing awareness competencies include:

- Are we clear about who is most affected by the issues we intend to address?
- Do we have the right people in the room to accurately diagnose or understand the issue we seek to address? If not, how we do get them here?

*Shifting attitudes requires individual, organizationwide participation in professional development activities that help people understand the context of structural barriers and the potential for evaluation to challenge or perpetuate barriers. Philanthropic leadership must clearly and directly relate this understanding to people's professional roles.*

- 
- Do we fully understand the systemic and structural barriers and challenges that contribute to the issue we seek to address?

#### **Attitude: Shift the Focus From Individual to Structural Barriers**

Building individual awareness of the factors underlying the power dynamics associated with persistent inequity can shift thinking toward institutionalized and structural barriers to equity. By making it possible for staff to have conversations that explicitly address race and equity with an emphasis on structural barriers, philanthropies support the personal and professional development that underpins equitable evaluation.

For equitable evaluation to fulfill its potential to improve the effectiveness of philanthropic investments and activities, this understanding should not be limited to evaluators. Shifting attitudes requires individual, organizationwide participation in professional development

<sup>10</sup> See <https://www.aecf.org/series/race-matters-collection>

<sup>11</sup> See <https://www.racialequitytools.org/resources/fundamentals/resource-list>

activities that help people understand the context of structural barriers and the potential for evaluation to challenge or perpetuate barriers. Philanthropic leadership must clearly and directly relate this understanding to people's professional roles (Annie E. Casey Foundation, 2009).

Questions related to addressing attitude competencies include:

- What is our understanding of the implicit bias and prejudice that has, and does, shape Western culture?
- Do we understand the role of power and privilege in relationship to the issues we address and the outcomes and goals we seek?
- How will we hold ourselves accountable for this understanding as a matter of professional development and professional expectation?

### Action: Build on Existing Practices and Recognize Where Standard Practice Must Change

Some areas of philanthropic organizational investment (i.e., juvenile justice, access to health care, education) may be more experienced in or hold themselves to higher standards of cultural competence and conducting evaluations with an equity lens, although they may not use these terms explicitly. Some interviewees noted that foundation staff who work in areas that consistently address disproportionality or disparity may be more comfortable than others discussing specifically how structural barriers and their implications relate to evaluation. Engaging a range of staff members in discussions of disparity builds evaluative capacity by allowing one group the opportunity to share its experiences regarding the impact of an equitable-evaluation approach and can explicitly inform evaluation efforts in other areas where equity has been less of a focus.

Alternatively, new efforts undertaken by philanthropy can establish the expectation that the principles of equitable evaluation will be upheld. One standard area of practice that is likely to

change, and warrants early attention to relationships and processes, is the nature of stakeholder collaboration. An organizational shift toward equitable evaluation requires deeper collaboration with stakeholder communities and the use of more participatory approaches (Campilan, 2000). However, the appropriateness and effectiveness of these approaches — that is, being both culturally competent and equity-focused — depends heavily on progress in awareness and attitude (Lee, 2007; Fine, 2010; Frierson et al., 2010).

Questions related to addressing action competencies include:

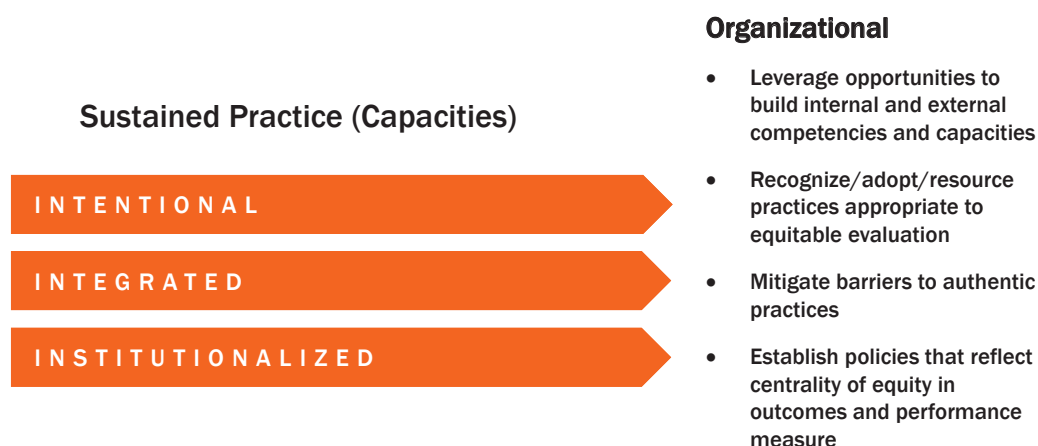
- What existing efforts have a clear focus on equity?
- In which existing efforts are race, ethnicity, or other socially defined characteristics associated with disproportionality?
- Do we have specific examples of how an equitable-evaluation approach or lack thereof has made a difference in project implementation or policies?

### Sustained Practice: Organizational Capacities

Organizational capacities refer to the sustained practice and internalization of an equitable-evaluation approach to the inner workings of a philanthropic organization. (See Figure 3.)

#### Intentionality: Decisions Reflect the Centrality of Equity

Philanthropies have much to consider when building organizational capacity for equitable evaluation. An explicitly articulated goal, one that informs both evaluation process and product, is paramount to a sustained practice of equity. It must be espoused by leadership and held by the whole of the organization. For instance, the home page of the W.K. Kellogg Foundation website in 2014 (at the time of this article's original publication) featured a clear statement about racial equity:

**FIGURE 3** Equitable-Evaluation Capacity-Building Approach: Sustained Practice/Capacities

We believe that racial healing and racial equity are essential if we are going to accomplish our mission to support children, families, and communities in creating and strengthening the conditions in which vulnerable children succeed. We actively support efforts to dismantle racial and structural inequities that limit opportunities and hold some children back.<sup>12</sup>

This is a powerful message that conveys a commitment for the whole of the foundation, not just a particular program area or the interests of an individual staff member. Speaking explicitly and transparently to the priority of equity is essential for equitable-evaluation practices and processes to gain traction.

In the near term, such intentionality may be demonstrated by expanding grantee and consultant opportunities to include practitioners who are most closely connected to and aware of the issues facing communities intended to benefit from philanthropic investments. This means moving beyond the usual suspects and being more mindful of outreach and communication strategies to initiate relationships with community partners, potential grantees, and

professional evaluators who possess the requisite equity-focused mindset, practice, or cultural competency (The Colorado Trust, 2012). At the time of this article's original publication, "New Connections: Increasing Diversity of RWJF Midcareer Consultants" and the "Bay Area Consultants of Color Directory" were examples of efforts to increase the visibility of practitioners, many of whom are evaluators, to philanthropic organizations. Other barriers to embracing a more diverse group of practitioners may include administrative hurdles such as limitations on with whom an organization can contract or the practitioner's size, scope, or location.

In the longer term, this intentionality would encompass support for greater competency within the evaluator pipeline.<sup>13</sup> The field needs to better reflect the variety of shared life experiences, culture complexities, and historical experiences of the professionals engaged to design and implement evaluations. From an organizational perspective, the field must expand its capacity to understand and integrate issues of equity and diversity in the design and

<sup>12</sup> The statement reflects what was shared on the W.K. Kellogg Foundation's website at the time of this article's original publication in 2014. More on WKKF's commitment to racial equity and ways in which this is now expressed can be found at <https://www.wkkf.org/priorities/our-dna/>

<sup>13</sup> In 1999 the AEA launched the Building Diversity Initiative, which produced recommendations for the AEA and the evaluation field as a whole. One important outcome of the two-year initiative was the creation of the Graduate Education Diversity Internship Program at Duquesne University.

interpretation of analyses. Efforts to promote greater and more explicit consideration of the factors of race, ethnicity, and lived experiences in evaluation, including the Robert Wood Johnson Foundation Evaluation Fellowship and the AEA Diversity Internship, reflect the importance of developing a pool of professionals who can close the gap between believing equitable evaluation is the right thing to do and knowing how to do it (Geisz, 2013; Peak et al., 2007).

Questions related to addressing intentionality include:

- How do outreach and communications strategies and administrative and other expectations serve as barriers to people who might best serve the mission of the philanthropy?
- To what degree is the philanthropy willing to nurture relationships with new and different types of partners with demonstrated cultural competence or an equity frame?
- How is the philanthropy prepared to respond to the issues of power and privilege likely to surface in discussions with those who lead with an equity frame?

### Integration: Recognize, Adopt, and Resource Practices Appropriate to Equitable Evaluation

To foster and integrate equitable evaluation internally and among the groups they invest in, philanthropies will have to do things differently. For example, to ensure that AEA's essential practices are honored and implemented, philanthropies must examine staff roles and commit to ongoing staff development. Creating an organizational capacity for equitable evaluation will encourage a more participatory environment, including deeper collaboration with stakeholder communities (Brunner & Guzman, 1989; Cousins & Earl, 1992; Cousins & Whitmore, 1998; Fetterman & Wandersman, 2005). Participatory approaches typically require attention to time frames and resources. Examples and considerations include the need to:

- identify and include individuals with shared experiences related to the issue at hand when considering evaluation design and implementation, meeting structures, time durations, and locations;
- build and sustain a representative team throughout the life span of the evaluation, paying attention to the process of group development and what it takes to support the group's effectiveness (Wanous et al., 1984); and
- translate materials into languages and formats designed to assure that everyone can participate fully in the evaluation and plan to share data in meaningful ways to all populations.

Equitable-evaluation practices may fail if they are not appropriately resourced. More than financial support, this means having the right people, time, and political will. This is a good place to repeat Hopson's cautionary note on rethinking "the conceptual lenses through which we see and evaluate groups of color (and other marginalized groups)" as critical to participatory processes (1999, p. 447). It speaks to the importance of EECB's weaving of individual competencies and organizational capacities.

Equitable evaluation calls upon us to bring considerations of culture directly into validity and theory in evaluation. Kirkhart (2013) introduces the idea of multicultural validity and challenges evaluation to recognize validity as a "construct of legitimization that occupies a position of privilege" (p. 2). In this space, equitable evaluation follows AEA's recognition that culture is not neutral and Kirkhart's recognition of our need for tools, such as "A Culture Checklist" to "support evaluators' ability to attend actively to aspects of cultural experience that surround assessment and evaluation" (2013, p. 9). Additionally, expanding an organization's understanding of statistical rigor requires applying a complex set of considerations and competencies (Leiderman, 2010). These include:

- consciousness regarding issues of disproportionality, disparity, and underlying factors;
- knowledge of the methodological tools and statistical tests available to examine differences;
- understanding how using a different set of tools or tests might allow evaluators to raise and answer new questions; and
- persistence and capacity to look critically at data to question how it is analyzed and interpreted.

Integrating equitable evaluation also means deliberately recognizing and paying attention to:

1. context, which has implications for understanding and interpreting data in a manner meaningful and appropriate to the culture and circumstance of the effort and its intended outcome. For instance, if the historical context for the under- or overrepresentation of a particular subpopulation in a public data set (e.g., African American males in the juvenile justice system or Native American children in foster care) is not understood, inaccurate assumptions about the incidence or prevalence of a particular social condition might be inaccurate, rendering the proposed solutions or interventions less effective if even relevant (McKenzie, 1997; LaFrance & Nichols, 2008);
2. fairness, which often corresponds to social norms, rules, and ethics that may not be consistent with equity. For example, organizational practices regarding fairness tend to mean everyone has an equal voice. This disregards the historical and present-day oppressions that prevent particular populations from fully expressing their experiences or engaging in open dialogue with those in or perceived to be in power. This might manifest in settings that bring together community members and funders, or in situations within an organization where staff — whether by position, class, or culture — feel less able to contribute to the conversation;

*Without attention to equity from the outset, evaluation can bring blame and disinvestment. It can sustain or exacerbate inequity in the very communities that were intended to benefit.*

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3. use of evaluation findings or the process itself to move policy and practice that can either promote or inhibit equity; and
4. harm — intended or unintended — resulting from the evaluation process, which may manifest as physical, social, or economic and that may disproportionately affect particular populations.

With points 3 and 4, it is important to recognize that evaluation is a political action in that it “creates alternate ways of thinking and talking about society and its purposes, and the relation between people and social institutions” (Kushner, 2000, p. 39-40). Without attention to equity from the outset, evaluation can bring blame and disinvestment. It can sustain or exacerbate inequity in the very communities that were intended to benefit.

The individual competencies of equitable evaluation and the principles of culture competency should not be limited to evaluators; they should be fostered and taught to staff across the organization (Lee, 2007). When that happens, it opens the door for principles of equity to manifest across all functions of the philanthropy, including human resources, governance, budget and resource allocation, and grantmaking. Preskill and Torres (1999) speak to four elements and practices of an organization that facilitate or mitigate its ability to function as a system that constructs and uses evaluative information effectively: culture, leadership, communication, and systems and structures. Certain practices

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within these four elements have particular relevance for equitable evaluation, including but not limited to:

- valuing employee diversity and seeking pluralistic understanding,
- valuing information from inside and outside of the organization,
- eliminating structural barriers to face-to-face communication,
- disseminating information that captures a diversity of voices, and
- helping staff members understand how their role relates to other roles and to the organization's mission.

This alignment increases an organization's ability to leverage its collective assets in service of solutions that are sustainable and support equity (VeneKlasen & Miller, 2006).

Questions related to addressing integration include:

- In what ways are the questions that drive actions and decisions related to the organization's strategy and investments aligned with evaluation design, implementation, and use?
- How are evaluation findings shared beyond program staff with others in the organization?

- What commitments are the philanthropy willing and able to make in terms making an equity frame at the core of all decisions?

#### **Institutionalization: Resist Silos and Assess Equitable Evaluation as Part of Philanthropic Function**

Equitable evaluation must not be viewed as ancillary to a philanthropic organization's work. It must be known and understood across all areas of investment and function. Identifying the key elements of equitable evaluation to which the organization consistently holds itself accountable reinforces the centrality of cultural competence and equity. As evaluation producers, philanthropies can speak to their progress and learning. They can share with the field and colleagues — including those who may be sponsors or consumers of evaluation — the value of equitable evaluation.

Questions related to addressing institutionalization include:

- What are the opportunities to share the successes, struggles, and failures across the philanthropic organization with regard to its efforts to practice equitable evaluation?
- What type of messaging, reinforcement, and culture change are needed to create a safe place to talk about the implications of an equitable-evaluation frame?
- How will the organization share its learnings with others, so collective efforts across philanthropic organizations might be more effective and lead to sustained changes in support of equity?

#### **Conclusion**

The history of evaluation is long, but as a profession it is less so (Shadish & Luellen, 2005; Worthen, 1994). Its practice in the philanthropic sector is even shorter (Hall, 2003). As evaluation evolves, philanthropy in its role as producer can advocate for theory and practices that advance notions of rigor and relevance pertinent to evaluation's usefulness — not only to



document impact, but also to inform strategy and investment.

This is particularly important for organizations whose missions touch upon equity issues, which are inherently complex and underpinned by social norms internalized at the individual, organizational, and systemic levels. These are norms that perpetuate advantages for some and disadvantages for others. Thus it is all the more disheartening when evaluation is done without an equity lens, running the risk of extending the very disparity that an organization seeks to remedy.

Equitable evaluation weaves the principles of cultural competence outlined in the AEA statement throughout the entire evaluation process. It affects everyone engaged in the process, including those who use evaluation findings. Its primary aim is not only to shed light on the factors that impede equity, but also to analyze and assess interventions, investments, and strategies through a lens of promoting equity.

The journey toward equitable evaluation has begun. Scholars and practitioners have formed a solid base from which it can continue to develop. The journey for organizations will not be short and will require the development and adoption of a set of individual competencies and organizational capacities that reinforce one another and alter a philanthropic organization's very cultural and strategic fabric.

The authors offer this equitable-evaluation capacity-building approach to the philanthropic field as a way to get ready to engage in equitable evaluation. We invite dialogue regarding both equitable evaluation and EECB in the hope of stimulating individual philanthropic organizational introspection and broader reflection in the field on how to deepen evaluation functions so they align with and support the values of equity.

*It affects everyone engaged in the process, including those who use evaluation findings. Its primary aim is not only to shed light on the factors that impede equity, but also to analyze and assess interventions, investments, and strategies through a lens of promoting equity.*

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**Jara Dean-Coffey, M.P.H.**, is founder and principal of jdcPARTNERSHIPS, a minority woman-owned consulting and educational firm. Correspondence concerning this article should be addressed to Jara Dean-Coffey at [jara@jdcpartnerships.com](mailto:jara@jdcpartnerships.com).

**Jill Casey, B.S.**, is an associate with jdcPARTNERSHIPS.

**Leon D. Caldwell, Ph.D.**, is chief strategy and equity officer at Equal Measure.

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