PRACTICE GUIDE SERIES

Doing Evaluation in Service of Racial Equity

Deepen Community Engagement

W.K. KELLOGG FOUNDATION

Contents

Doing Evaluation in Service of Racial Equity : Deepen Community Engagement

i ..... To our readers

iii ..... Evaluation and racial equity: How *did* we get here?

1 ..... Section 1: Meaning of community engagement

3 ..... Section 2: Definition of community and ways to learn more about community

3 ..... Appreciating what community is and isn't

5 ..... Learning who the community Is

9 ..... Section 3: Operationalization of engagement in service of racial equity

11 ..... Identifying and working with community leaders, beyond the obvious choices

14 ..... Engaging community means building community capacity to use data for advocacy

16 ..... Methods of engagement

21 ..... Section 4: Decisions and choice points you will likely encounter

30 ..... Conclusion

31 ..... Resources

32 ..... References

To our readers

From our earliest days, our founder W.K. Kellogg articulated a formula for change that relies on the leadership and authentic engagement of local community members. As he wrote, "...it is only through cooperative planning, intelligent study, and group action – activities on the part of the entire community – that lasting result can be achieved." This formula, paired with a resolute commitment to eliminate racism's enduring effect on the lives of children, families and communities, guides how we support and work alongside grantees.

Although this commitment to racial equity began decades ago, it was not until 2007 that the W.K. Kellogg Foundation (WKKF) board of trustees committed us to becoming an anti-racist organization. That explicit directive accelerated efforts to examine every aspect of operations and grantmaking from that perspective. In that effort under the leadership of WKKF President and CEO, La June Montgomery Tabron, we identified and named racial equity and racial healing, leadership development and community engagement as our "DNA"–approaches so essential that they are embedded in every aspect of the Kellogg Foundation's work.

In evaluation, the seeds for that were planted decades ago. For example, the Kellogg Foundation funded the American Evaluation Association's Building Diversity Initiative in 1999, explicitly focusing on diversifying the evaluator pipeline and promoting culturally competent evaluation practices. Today, the foundation again finds ourselves leading the field in moving beyond culturally competent evaluations to equitable evaluation (i.e., using evaluation as a tool to shine light on racial inequity and social injustice, and to improve solutions that create a world in which every child thrives).

Practicing equitable evaluation is not, cannot and should not be only for evaluators of color. As a group of professionals, we all bear the responsibility and obligation to do so. In May 2020, the world witnessed George Floyd's appalling murder. Together, people worldwide joined throngs of demonstrators marching in solidarity for a common humanity and calling for leadership and justice on behalf of one man and many others senselessly taken by police violence. As an evaluator, I believe evaluation can be a tool to promote democracy and advance equity. Equitable evaluation can render power to the powerless, offer voice to the silenced and give presence to those treated as invisible. The tools we employ–authentic data collection, analysis, reporting, learning and reflection–can debunk false narratives, challenge biases, expose disparities, raise awareness, level the playing field and reveal truths for measurable positive progress in our society.

As evaluators of color, we have been grappling with how to go beyond the rhetoric of why evaluation currently is not helping to advance racial equity to actual practice. We struggle with questions such as: "Should evaluation be value-free and agenda-free?" "Do our own lived experiences, values and cultures have a place in our evaluation practice?" "How do we bring our whole selves to our work – our intellect, our passion and our histories?" Moreover, we wonder how evaluation can authentically facilitate the advancement of racial equity–so the stories of communities of color are fully told and understood, so the solutions emerge as truly their own.

Every day, we find ourselves asking more questions, pivoting our thinking, wrestling to demystify technical jargon and quite honestly, sometimes wishing we were doing something else, especially on days when we must defend our stance, expertise and identities. "How to" is emerging as something we need to develop so the community of evaluation professionals and evaluation consumers will review, peruse, use, critique, refine, revise and enhance the content of practice guides, all in service of achieving racial equity. With such context and background, this series is produced.

Doing Evaluation in Service of Racial Equity consists of 3 practical guides for evaluation professionals who want to do this important work and/or who want to better understand it. Rather than debating the value of evaluation in service of racial equity, we are offering a way forward. We do not pretend to have all the answers. However, we hope this series takes some of the mystery out of evaluation practice and shows how to authentically use evaluation to advance racial equity. There is no single tool, framework or checklist that will transform someone into a practitioner of this type of evaluation. It requires lifelong commitment to self-reflection and learning, as well as racially equitable solutions to change deep-rooted racist systems. This guide aims to show **how** to incorporate this core value and alignment into the evaluation practice.

There are three guides in this series, and this is **Guide #3:**

Guide #1:
Doing Evaluation in Service of Racial Equity: Debunk Myths

Guide #2:
Doing Evaluation in Service of Racial Equity: Diagnose Biases and Systems

Guide #3:
Doing Evaluation in Service of Racial Equity: Deepen Community Engagement

We are grateful for Kien Lee, Principal Associate of Community Science, for her leadership in developing and writing this series of practice guides, with support from other Community Science staff. We would like to thank the following individuals for their insightful reviews and feedback in revising the content: Holly Avey, Asian & Pacific Islander American Health Forum; Nicole Bowman, Bowman Performance Consulting; Elvis Fraser, Sankofa Consulting; Melvin Hall, Northern Arizona University; Cynthia Silva Parker, Interactions Institute for Social Change; Daniela Pineda, Informed Insight; and Courtney Ricci, The Colorado Trust.

We would also like to thank WKKF colleagues on the evaluation, communications and racial equity teams for their roles in fine-tuning and finalizing the guides.

We welcome you, our readers, to share your comments and suggestions in making the guides the most useful for evaluation practitioners in our collective pursuit of **Doing Evaluation in Service of Racial Equity.**

Huilan Krenn, Ph.D.
Director of Learning & Impact
W.K. Kellogg Foundation

November 2021

Evaluation and racial equity: How did we get here?

What was happening in our country and in the world when we began writing this series?

When we started writing this series of guides about evaluation in service of racial equity, the world was experiencing a major public health crisis and much of the United States was facing civil unrest in response to police brutality. These events highlighted the existing cracks in our communities and in our country along racial, ethnic and socioeconomic lines, making them visible to many White Americans who had previously ignored, dismissed, minimized or denied their existence. The unrest, coupled with the disproportional impact of COVID-19 on Native Americans, Blacks and Latinos made it more difficult for people to remain ignorant or tolerant of racism. It became clear that certain groups of people, because of their skin color, limited education, immigration status or other traits, are still subject to a kind of oppression that denies them fair and just access to opportunities and resources that enable them to thrive. In certain cases, the opportunity to simply survive is not even available.

Suddenly, organizations and corporations were in search of strategies for increasing their own diversity, equity and inclusion (DEI). Age-old symbols of white supremacy (e.g., Confederate flags, public statues of Confederate generals and sports team mascots that promote harmful stereotypes of Native people) were being eliminated. Terms such as “white fragility,” “white privilege,” “anti-Blackness,” “unconscious bias,” “allies” and even “systemic racism,” exploded into mainstream news. We recognize these issues have existed for generations. However, many people were recognizing them for the first time as they were no longer able to remain ignorant of their presence.

This context is relevant to evaluation. Evaluation at its best should generate knowledge, and knowledge—when made accessible to people who have been oppressed—contributes to their ability to make change. Evaluation also is used to:

- Judge the merit of an intervention.
- Determine whether the intervention deserves continued funding and support.
- Affirm or dispute the assumptions on which the intervention is based.
- Hold leaders and organizations accountable to the communities they serve.

All these functions make evaluation an instrument of power, especially because organizations turn to evaluators to help them determine if and how their services, programs and practices truly contribute to racial equity and how they can be improved. Evaluators—as well as funders, program managers, advocates and community leaders—have started considering the role of evaluation in creating a more equitable and just world, contesting the canons of science and positioning evaluation as part of a larger movement for racial equity and social justice. Evaluation, a field that has already revised approaches to ensure *responsive* evaluation, *democratic* evaluation and *transformative* evaluation, is now undertaking efforts to ensure *culturally responsive* evaluation and *equitable* evaluation.

Debates inside and outside the profession are often reduced to whether evaluation should be value-free and impartial, or whether evaluation should intentionally promote racial equity through its methodologies, as if they are mutually exclusive.

This debate creates a false dichotomy, wasting precious time that we can use to hone the practice of evaluation that is in service of racial equity and scientifically rigorous. We can also use the time to educate people who direct nonprofits, advocate for social justice and lead community change—who are not immersed in the study and practice of evaluation—about what they can expect from such evaluations, and not be confused about rhetoric, philosophies and the like. Simply put, they need to know how to do evaluation that supports their racial equity agenda. It is time for us to shift our focus to how we practice in a way that facilitates racial equity, learn from our experiences and keep pushing the practice forward.

Evaluation in service of racial equity is a practice, not an aside, a checklist, a course or something you do only if the funder wants it. We must engage in a real dialogue about the myths of evaluation that stand in our way, our own biases, our understanding about systems that perpetuate racial inequity and poor community engagement and our actions as evaluators to help create healthy, just and equitable communities.

How do we get there?

As a field, evaluation practitioners need to focus on intentionally breaking down and changing several evaluation-related practices that are especially relevant to racial equity goals. In essence, evaluators have to:

- Go beyond technical tasks and have the knowledge and skills to challenge strategies intended to end disparities in education, health, housing and other areas.
- Engage early in the development and improvement of a strategy so they can raise questions and concerns about *who* is driving the strategy, *with* whom and *for* whom. Funders and organizations typically do not engage evaluators until after their strategies have been developed or are ready for implementation.
- Compel funders and organizations to take the time to define and understand the "community" and be clear about who in that community is supposed to benefit from their strategies.
- Meaningfully and authentically engage the community most impacted by the initiative to learn about their lived experiences and community knowledge, which can guide the practice and use of evaluation.
- Learn about the history of the country, as well as the communities in which they are working to understand—with humility and a systems lens—how past and current institutional structures and policies contribute to power differences and the racial oppression and disparities experienced by people and communities of color today.
- Self-reflect and transform their own thinking and practices. They should also bring in partners with complementary competencies to help respond to the issues and needs that will inevitably arise during the process. This can help them become more connected to relevant fields (e.g., racial justice, organizational development, group facilitation, conflict resolution) to be able to tap into those resources.
- Create an evaluation process to confront and deal with power issues, including differences in power between funders and grantees, between leaders and staff in organizations, between large established and small grassroots organizations and last but not least, among the evaluator, participants and the sponsor or client.

- Design evaluation to use multiple methodologies and studies to assess different types of changes—individual, organization, system and community. Different methods must be used to understand and map complex relationships and connections, identify emerging developments that could facilitate or hinder change and call out intended and unintended outcomes and consequences. This rigorous approach is necessary to assess systems change that can move us toward racial equity. It has to become a *primary* practice in evaluations in service of racial equity. This also means there must be sufficient time, resources and thoughtfulness to coordinate, integrate and make sense of the findings across studies, and use them effectively to improve and move the needle toward racial equity. Too often, funders and organizations don't do this and the knowledge generated by the studies becomes fragmented, diminishing the true value.

- Maximize the use of evaluation by incorporating evaluation into other capacity-building activities. Funders to social justice organizations have to continuously test, improve and learn from strategies to achieve racial equity. Evaluation is often viewed as a threat or something "off to the side." Evaluators alone cannot advocate for use of evaluation findings. Evaluation has to be part of technical assistance, trainings and other capacity-building activities to help communities *and* funders transform findings into usable knowledge. Too often, funders don't invest sufficient resources for the evaluator and other partners to coordinate their efforts or simply leave it to them to "work it out among themselves." This oversight undermines the potential of the evaluation.

None of the above can occur in a vacuum. Evaluations and evaluators are part of an ecosystem of philanthropic organizations, academic institutions, scientist establishments, public agencies, professional associations and the consulting industry—all of which have to do business differently if the practice of evaluation can aid in progress toward racial equity.

How can this series of guides help you as evaluators?

This series of guides, ***Doing Evaluation in Service of Racial Equity,*** is designed to help you exercise your own agency to better use your expertise to achieve racial equity and improve the services you provide your clients and the communities they support. It integrates and further expands on the work of many evaluators who have pushed the envelope through developing new concepts such as multicultural validity, culturally responsive evaluation and equitable evaluation. It also incorporates ideas from systems thinking, organizational development and other fields to help you put evaluation that is in service of racial equity into practice. The series is split into three guides and while they are all connected, they do not need to be read in order, or in full, to be valuable.

PRACTICE GUIDE

Doing Evaluation in Service of Racial Equity: Debunk Myths

The beliefs and ideas funders, advocates, community leaders, evaluators and others carry that can make everyone anxious and apprehensive about practicing evaluations for this purpose.

PRACTICE GUIDE

Doing Evaluation in Service of Racial Equity: Diagnose Biases and Systems

Implicit biases that influence evaluation practice and evaluators' understanding of systems and the use of a systems lens in evaluations.

PRACTICE GUIDE

Doing Evaluation in Service of Racial Equity: Deepen Community Engagement

Responsible, responsive and genuine engagement of communities in the evaluation process and as an outcome in evaluation.

For some the background may seem obvious or rudimentary, especially if you understand structural racism and/or you have experienced racial discrimination. For others, there might be new information and suggestions that can lead to different insights, especially if you have limited understanding about structural racism and/or have never experienced racial discrimination.

This series as a whole:

- Presupposes that evaluation can be used to advance racial equity without diminishing scientific merit.
    - If you don't believe you have a responsibility to use evaluation to promote racial equity and social justice, you could undermine and even harm communities.
- Represents work in progress while reflecting the current state of the field.
    - Evaluation continues to evolve in response to the U.S. political and social climate.
    - Evaluators continue to exercise their agency, work to embed evaluation into strategy and be honest with themselves, their peers and their clients about how everyone can change the way they go about the business of evaluation.
- Uses the terms *people* and *communities of color* for consistency to refer to the collective of people who identify as African Americans, Blacks, Latinos, Native Americans, Alaska Natives, Indigenous, Asians, Native Hawaiians and Pacific Islanders.
    - This term, along with others such as BIPOC (Blacks, Indigenous and Other People of Color) and Latinx have their own meaning in specific contexts, and it is not the task of this guide to determine which term is correct in which instance.
- Is written by real people who bring their expertise, passion and lived experiences to their work.
    - You'll find technical information as well as expressions of the writers' convictions about evaluation along with personal accounts of their experiences. .

The time to act is now, while individuals and organizations are eager to learn and open to making positive changes toward racial equity, and while our country works toward healing and recovering from the pandemic and civil unrest.

Practice Guide
Doing evaluation in service of racial equity: Deepen community engagement

Why focus on engagement?

The term community engagement is so easy to say. The term connects people with each other, and it seems so simple, so natural and so human. We place the term community engagement before a convening, meeting or act as a symbol of our good intentions (Chavis & Lee, 2015). It conjures images of neighbors making and delivering food to vulnerable residents during the COVID-19 pandemic, people of color advocating for equitable treatment of young Black men and residents at a county council meeting expressing their concerns about the lack of healthy and fresh food in the community. It is so common a term that we almost never define it or explain what we mean by it.

When left undefined and not operationalized, the notion of "community engagement" in evaluation ranges from engaging grantees to surveying community members and using them to help collect data and discussing the results. There are challenges.

- The amount of time it requires to engage community is not aligned with expectations of funders and organizations that are implementing the initiative.
- The support to enable the evaluator, funder, nonprofit and community leaders and other partners in the work to engage with each other in an authentic and meaningful way is seldom addressed.
- The status quo for how community members are involved in decisions that influence their lives is rarely changed.

In this practice guide, we'll explore these challenges and learn how to go beyond asking community members for input and involving them in data collection and interpretation, to make sure community members are treated justly both in the evaluation and in the initiative. It is organized into four sections:

1. Meaning of community engagement.
2. Definition of community and ways to learn more about community.
3. Operationalization of engagement in service of racial equity.
4. Common types of choices and decisions that evaluators encounter when supporting community engagement.

A few things to know before you continue reading:

- The term ***community*** in this guide refers to the community that is most impacted and supposed to benefit from the initiative being evaluated and does not refer only to a physical place. (What community is will be described in Section 2.)
- The term ***community members*** used in this document refers to both community leaders and community members who should be involved in the evaluation. The distinct roles of community leaders and community members are important, but it is beyond the scope of this guide to discuss this in detail. Only in one section of the guide is the distinction described to make a point about the way a community is organized to support the members who are part of the community.
- The phrase ***funders and organizations*** refers to the philanthropic institutions, government agencies and nonprofit organizations that fund and implement the initiative being evaluated.

Section 1:
Meaning of community engagement

Evaluators who intentionally use evaluation to advance racial equity are responsible for making sure that community members most affected by the work that is being funded and evaluated are involved in the evaluation, which should contribute to the members' ability to influence decisions that affect their access to resources and opportunities and their fair and just treatment by those in power.

In an evaluation to advance racial equity, evaluators also work to ensure that the community members' interests and priorities are in the forefront of funders', organizations' and policymakers' agendas. This responsibility is crucial in two situations: Where the funder has been and continues to fund the organizations that don't have deep roots in the community, but know how to write compelling proposals and have a long-standing relationship with the funder; and where the organization that does not have deep roots in the community continues to "represent" the community.

In evaluations in service of racial equity, community engagement goes beyond getting community members' input and lifting up their voices, by contributing to their ability to influence decisions that affect their access to resources and opportunities and their fair and just treatment by those in power.

This is meaningful community engagement (that is, responsible, responsive and genuine engagement without tokenizing community members) and it goes beyond how community engagement in evaluation is typically practiced.

Evaluators wanting to do evaluation in service of racial equity can start by:

- Sharing decisions about the evaluation design and implementation with community members and being explicit about where their power begins and ends.
- Making sure that the initiative's assumptions, approach and strategy are appropriate—in terms of culture, history, capacity and impact—for the community that is supposed to benefit from it.
- Involving the community in framing the problem and determining what success looks like to help align the initiative's assumptions with the strategy and the evaluation.
- Involving the community in interpreting the results to make sure that progress or lack of progress is accurately understood and contextualized, and decisions for improvement are properly informed.
- Ensuring that the community that is supposed to benefit from the initiative are treated with fairness, justice and respect.

For evaluators to create authentic community engagement, they have to be brought into the initiative's core team while the initiative is being designed. If they are brought in after the initiative has been designed, they can—as part of their role and scope of work—assess and document the extent to which community members are involved and work with the funders to improve their community engagement strategy.

Section 2:
Definition of community and ways to learn more about community

As mentioned in the introduction, community is a term and an idea that is thrown around a lot and everyone assumes that everyone else understands what it means. In evaluations in service of racial equity, it is important that evaluators develop a deeper understanding of that community.

Appreciating what community is and isn't

Community is about people and relationships. Community is not a place, a building or an organization, nor is it an exchange of information over the internet. Neighborhoods, companies, schools or places of faith are contexts and environments for community, but they are not communities themselves.

Community is formed when people have relationships with one another based on some sort of connection they feel.

They have a sense that they share a similar history, identity and/or interest and this sense is powerful enough for them to feel connected. This feeling also means people know who is and isn't part of their community, which can lead to a stronger bond among those who are part of the community. However, it can also lead them to exclude, disregard and even mistreat those who are not part of the community.

People form and maintain communities to meet their needs (Chavis & McMillan, 1986; Chavis & Lee, 2015). For instance, Black people have formed relationships and community where they live and beyond based on a sense of their shared history of racial oppression. Therefore, an initiative designed to advocate for just treatment of young Black women and men by law enforcement has to be clear about which "community" is most affected and supposed to benefit—specifically the young Black men who live in a particular city or, more generally, all young Black men and women ages 18-30 who live in the United States. The initiative's approach, strategy and evaluation will have to be different depending on which community is the focus.

Because community is about people and relationships, evaluators (and funders and others who are supporting and implementing the initiative being evaluated) should not assume the following:

- The community is homogenous. It is not, even when it appears so from the outside.
  - On the contrary, a community is made up of more communities because people tend to have multiple social identities and belong to multiple communities at any given time. Therefore, a community is diverse even if it doesn't appear that way from the outside. Think as simply as adding a gender overlay to a community of people of Mexican heritage in Los Angeles, for instance. Men, women and people of other genders might experience the community in different ways, even when they share the same heritage.

What community is

- **Community is about people and relationships.**
- **There are communities within a community.**
- **Community leadership comes in many different forms, both formal and informal.**
- **Communities evolve and change.**

- The community is represented by leaders such as elected officials, executive directors of nonprofit organizations, advocates, neighborhood association presidents and others like them. That is not true; there are informal leaders as well.
  - Community leadership comes in different forms depending on the community members' histories, cultures and experiences. There are both formal and informal leaders in communities, including the people mentioned above as well as people such as the business owner who supports many community events, the older woman who everyone loves and listens to because she is wise, warm and always there for everyone and the spiritual leader (see for example Colby, 2018). Community leadership may not be as diverse as the full community they represent either. There can often be members of a community whose interests are not represented in said leadership.
- The community is static. On the contrary, it is always evolving.
  - Communities evolve and change because relationships are dynamic and also due to a variety of factors that are sometimes within their control (e.g., election of new leaders) and sometimes not (e.g., global and national forces that change the demographics of a community).

Evaluators must go beyond what they see as "community" to develop a deeper understanding of the community most affected by an initiative.

Learning who the community is

Funders and organizations usually determine the communities that their work is supposed to benefit the most, but it is up to the evaluator and other partners helping to implement and evaluate the initiative to learn about that community to appropriately engage the community members. There is no end to how much learning evaluators can do about a community. If we, as evaluators, are learning about a community as we should be, we can articulate things about the community that we didn't know before. We should also find our assumptions about the community being challenged by our new knowledge.

Here are several ways that evaluators can go about learning more about the community that is supposed to benefit from the initiative they are evaluating. These steps do not have to be conducted in a sequential manner; they can be carried out simultaneously and iteratively. Evaluators will have to triangulate the data, especially when there is limited data about the community.

Collect and compile information about the community's demographic makeup and disaggregate the data to the extent possible.

Evaluators should help funders and organizations working on the initiative understand the diversity of the community affected and the "subcommunities" that may be embedded within this community. It is helpful to compile any existing data and study the trends and patterns by race and ethnicity. If it is possible to further disaggregate the race and ethnicity data by additional dimensions such language spoken, country of origin, age, income, gender, disability status and sexual orientation, that would be ideal. However, this is not always possible especially in rural communities where data are limited. If existing data are limited, you can collect the data needed by working with community leaders, conducting a literature review or tapping into local colleges and universities to see if there are studies that have already collected demographic data that they can use.

Identify organizations that serve and support the community and ask them about their constituencies, service recipients and characteristics of groups that make up the community.

Another way to get to know the community is to look up information about the community (e.g., books, the internet, newspapers), which will give you a hint about the groups of people who live there. Either on websites and/or by combining terms that include the "racial/ethnic group" plus "programs" or "services" plus "issues" (and name of the geographic area if it is a place-based initiative), you may be able to identify organizations that provide direct services to particular segments of the community, advocate for concerns of specific groups of people in the community, and support different networks of people in that community in a variety of ways. Editors of newspapers or magazines and hosts of radio stations for communities are excellent sources of information about the community. You could contact these entities to ask them questions such as:

- How would you describe the community you serve or work with—their culture, history and shared values?
- Who do community members turn to for help when they have a question or a concern, besides your organization?
- Are there differences between groups of people in the community and why?
- What issues and concerns have you reported on?

Visit the community if it is located within a physical place.

If the community of interest is based in a physical place, you can identify bridge-builders and community leaders with the help of the funder, grantee, other local organizations and professional networks. Drive around in a community and visit local restaurants, corner stores, convenience stores, barbershops and other local businesses and speak to their owners or managers. Stop by the schools and community centers and speak to the principals and executive directors and frontline staff. Ask them about who is influential in the groups of people they come into contact with. Check out bulletin boards in public places where people advertise for services and look for postings about association meetings, festivals and other types of gatherings. Attend these and speak to the people who organize and host them.

Bridge-builders are people capable of crossing cultural boundaries and helping you learn about the community (Endo, Joh & Yu, 2003). As you work with the bridge-builders, you might want to observe their behaviors (e.g., how they approach and greet different community leaders and residents) and ask them about who has the most knowledge about the community, what the state of relationships are across different groups of people in the community and who the leaders are or where the power resides (Lee, 2007). Ask questions such as:

- Who do community members turn to for help when they have a question or a concern?
- In what ways do people get involved in the community?
- What types of civic institutions are there in the community?
- What issues have brought people together or divided people in the past and present?

Examine data and/or review studies about any racial and ethnic health, education, housing and other disparities and inequities.

These data provide another source of information for further understanding about the community of interest. For example, in a place-based initiative, the data for a particular community could reveal a health disparity between Black people and White people and an even wider health disparity between Indigenous people and White people. This could mean that an initiative designed to benefit Place X must be tailored to the different subcommunities within the larger community of color there. In a national initiative to shift narratives about people of color, the narrative about Native Hawaiians is different from the narrative about Native Americans and Alaska Natives. The narrative about Black women is different from the narrative about Black men. When examining the data, ask questions such as:

- What are the differences between racial and ethnic groups and within each group with regards to their health, education, housing and other outcomes?
- What are the differences in how they are treated?
- What are the factors and root causes contributing to the disparities and inequities (see Practice Guide – Doing Evaluation in Service of Racial Equity: Diagnose Biases and Systems)?
- Who are the community leaders and advocates on the issues?
- What challenges have they faced? What progress have they made?

You can then share the information you gather and learn with the funders and organizations involved. It can be used to develop a plan to engage the community around the initiative's theory of change and logic model to check if the strategy is appropriately tailored to the community of interest and the specific groups of people within that community.

Once you have a better understanding about the community most affected by the initiative and their values, traditions, cultures, histories and experiences, you can continue to engage the community members in culturally appropriate ways in the evaluation's design and implementation.

Learning about a community takes time and resources (e.g., staff, travel expenses) and funders, organizations and evaluators have to be prepared to negotiate and arrive at a budget and timeline that are realistic. Trade-offs will be inevitable. For instance, a foundation may not be able to report to the board as scheduled because the evaluator learned about a conflict in the community that could affect the initiative and needed to be explored more carefully before launching the initiative or implementing the evaluation.

Section 3:
Operationalization of engagement in service of racial equity

Evaluators working in service of racial equity have to operationalize what it means to engage the community in a way that moves the community toward developing the power to influence decisions that affect their lives. Engaging the community in this way not only ensures more robust data collection and offers research findings that increase the validity, accuracy and trustworthiness of information, it also ensures that the knowledge generated by the evaluation is accessible and useable to the community (Bowman et al., n.d.).

Exhibit 1 lists questions that evaluators can pose as part of the engagement process throughout the stages of evaluation. Some of these questions come from the "By Us/For Us" framework for engaging and reaching out to Indigenous communities (Bowman et al., n.d.).

Exhibit 1: Illustrative Questions to Ask to Engage Community

Interpretation & Learning	Planning	Implementation
What do you want to learn from the evaluation to help you advocate for more equitable policies and systems?	Are we still adhering to the agreements? Which ones have we been less successful in adhering to and why? What agreements do we need to change?	Do the findings help you and your community advocate for more equitable policies and systems and reduce disparities? Why or why not?
What does change and success look or feel like that will signal progress toward racial equity?	Are there any emerging opportunities and challenges affecting your community that the evaluation could help you tackle? Is there any data the evaluation can provide to assist you?	What is the story to be told? Who should tell it and who should hear it?
How do you want your story to be told to ensure no harm is done to your community, and more importantly, to help change narratives about your community?	Where can the evaluation and we, as the evaluator, do better to support the community and the pursuit of racial equity?	Which parts need to be framed carefully to prevent negative consequences for the community?
What experiences have you had, if any, with past evaluations and what was helpful and not helpful about the evaluations?	Aside from the evaluation, is the initiative supporting the community in the way it was intended? Why or why not?	Which parts of the story can be shared publicly and which can't? Who decides this and when?
What is meaningful involvement to you that does not look or feel like you are being used in a tokenistic way?		What reports or other products based on the evaluation could generate support for your advocacy for racial equity?
What can get in the way of your involvement?		What needs to be improved in the evaluation?

It is important to acknowledge that evaluators' capacity to ask and answer these questions are shaped in part by the funders and organizations that are supporting the initiative. Together, they all dictate and shape the following conditions, which determine the extent and success of the community engagement process:

- Amount of resources available for community engagement as part of the initiative and the evaluation, especially in the beginning of the initiative.
- Length of time for the community engagement process before funders and organizations want to see implementation or process outcomes.
- Mindsets, myths or mental models of the evaluators and partners that are responsible for managing the initiative about the function of evaluation beyond collecting, analyzing and reporting data.
- Facilitation skills of the evaluator.
- Willingness of each party, especially the funder or the organization, to share the power of decision-making with community leaders and grantees.

The evaluation profession and evaluators cannot change the practice of community engagement alone. Funders and organizations who are part of the ecosystem of grantmaking, implementation, capacity-building, research and evaluation and advocacy must be willing to change the way they contract, grant, implement and practice. Only this can truly help implement community-centered initiatives and to put community members in the driver's seat—two increasingly popular and common ideas in initiatives about power-building, racial equity and social justice. Nevertheless, evaluators who want to practice evaluation in service of racial equity have to make choices about how much engagement they can do; these choices are discussed next.

Identifying and working with community leaders, beyond the obvious choices

In evaluations in service of racial equity, it's about more than lifting up community voices and authentic engagement. It's about intentionally going beyond the obvious choices to identify and engage both informal and formal community leaders to help make decisions about the initiative (if the evaluator is brought in before the initiative is designed) and the evaluation. The obvious choices are the go-to people who are noticeable to the outsider, such as executive directors of nonprofit organizations, service providers, elected officials, faith leaders and advocates. While these individuals certainly play a role in the communities they serve, live in or work with, they are not the only community leaders.

There is a layer of community leadership that may not have the formal recognition or public visibility to be in the forefront, but still have influence and more importantly, most likely have deep knowledge about their communities' needs and priorities. These leaders are usually invisible to the outsider yet can be more in touch with a wider range of community members. They include people such as the elder whose wise counsel is frequently sought by community members, the woman trusted by her neighbors because she takes care of their children, the owner of a local corner store that everyone respects because he gives back to the community or the parent who other parents turn to about their concerns with their children's school.

In short, you need to look beyond the apparent layer of leadership to other types of leaders who have deep and real knowledge about their community. Their insights are needed to ensure that the evaluation helps address any unfairness and injustice their members experience. You can also ensure that the funder and organization and other partners in the initiative know about all the leaders in this layer of leadership.

Here are some tips for how to do identify and engage the less apparent, and perhaps more important, layer of community leadership.

Ask the organizations implementing the initiative.

These organizations often have relationships with community leaders as part of a community advisory board, volunteer work or other community engagement structure. They can provide guidance about how the evaluator could learn more about the community.

Understand how communities are organized.

It is highly unlikely that you would invite the entire community to be involved in the evaluation. You must be able to identify and engage the leaders or representatives—who may or may not be part of the organizations funded to do the work, as mentioned before, which also means you have to understand something about how communities are organized to support their members, share information and strengthen their community.

The organization of a community is rooted in the community's history, culture and context. For instance, the church plays a major role in the organization of the Black community as do Black sororities and fraternities. There is historical context for this. The faith leader and the leadership of the sororities and fraternities are often viewed as leaders in Black communities, whether at the national or local level. In Native American and Alaska Native communities, the Tribal Council plays a significant role in governing the tribal community and supporting their members (Bowman et al., n.d.). In these communities as well as in Native Hawaiian communities, elders are considered to have knowledge and wisdom and community members often turn to them for advice and support (Bowman et al., n.d.; Van Tilburg et al., 2017). In immigrant communities, the organization may imitate that of the community's country of origin or, more likely, the organization takes on a hybrid structure that builds on the traditions of their homeland and adapts to fit the "American Way." For example, rotating credit and hometown associations (they have different names depending on their members' country of origin) and cultural groups are prominent in newer immigrant communities where members are working toward economic security while maintaining their culture by passing the traditions on to their youth (Maynard, 2004; Oh, 2007; Wang, n.d.). Leaders of these groups act as resources and leaders for their community members.

The above types of leaders are sometimes obvious to the outsider and sometimes not. They include both formal leaders who are elected or appointed as well as informal leaders who people naturally turn to for help because of their role in the community. These leaders are present at all levels geographically, whether it is the Black community in the United States or the Salvadoran community in Washington, D.C. You can start by inviting the obvious, visible leaders to get involved in the evaluation, while continuing to seek out other informal and perhaps less visible leaders. Examples of these more obvious, visible leaders you can start with include editors of ethnic or local neighborhood newspapers, directors of local nonprofits, directors of offices of racial equity or immigration affairs in local governments, school principals and presidents of neighborhood and civic associations.

Be mindful of the nature of relationships between community leaders and different groups of community members.

It matters who you invite first to ask the question about how the community wants to be involved and how evaluators convene them. Evaluations are political because they are often viewed by the people who participate in them as judges and influencers of whether initiatives are funded or not, and therefore which organizations get funded. In evaluations in service of racial equity, the political nature of the evaluations is even more pronounced because there is a lot at stake for communities of color. Therefore, it matters a great deal who gets invited to have a say in the evaluation, when and how.

You might be working in communities with close-knit networks. You can be perceived as "taking sides" or preferring one community over another if word gets out that you are engaging with one group before another. This is especially important to keep in mind if you happen to share the same racial and ethnic background as one of the communities or you are from the same community.

Evaluators who want to practice evaluations in service of racial equity need to self-reflect on their own worldviews, explore their own implicit biases about people who share and don't share their racial and ethnic identities and be mindful of how others perceive them—as educated professionals and also based on their race, ethnicity and other obvious demographic characteristics.

You also have to be mindful about who you are working for or contracted by because your affiliation with the funder or organization can affect people's perceptions and assumptions about them. If community members are skeptical about the funder or organization, you have to explore why they feel this way and be honest with the funder or organization about what you learned. You also must be careful not to replicate the funder or organization's practices that contribute to the community members' skepticism, be transparent with community members about the purpose of the evaluation, and ensure that community members are meaningfully engaged in the evaluation.

While evaluators are not responsible for repairing the relationship between the funder or organization and community members, they are responsible for ensuring that the evaluation provides information that could improve the relationship and more important, not do further harm.

Engaging community means building community capacity to use data for advocacy

Community capacity—knowledge, skills, resources, relationships and commitment—to use data for advocacy is a critical element of racial equity work. Organizations that represent communities of color range from large established national institutions to smaller emerging organizations and grassroots volunteer groups that work at different levels of geography. The latter may have little to no exposure to evaluation and the use of data and findings for advocacy. Evaluations in service of racial equity need to consider this limitation and work with the funder and other partners implementing the evaluation to integrate community capacity-building into the initiative supports. Here are some suggestions.

Make evaluation useful and not a mystery.

Evaluators have a tendency to use jargon and mystify evaluation by using technical concepts and terms to describe scientific rigor and the methods they use. This leaves community members with the impression that evaluations can only be done by people with doctoral degrees and/or people who are considered "experts." In conducting evaluation in service of racial equity, you have to do what you can to prevent or change this impression and show how you value community members' knowledge and experiences by focusing on the community's equity concerns while using approachable language.

Build in time to educate and train community members about data and evaluation.

There are perceptions among some community members that data reflect white supremacy values and their use diminishes progress toward racial equity. The problem is not data, it is the ways in which data are misused—deliberately or not—to hinder or facilitate racial equity. Data can be equally used to defend and safeguard actions toward racial equity. (The Practice Guide – Doing Evaluation in Service of Racial Equity: Debunk Myths discusses myths about evaluation that can get in the way of racial equity.) Evaluators who are committed to using evaluation to advance racial equity can build in time during the process to help community members understand the strengths and limitations of the data, including:

- Who makes up the sample for the evaluation and how representative is the sample.
- What data collection methods were used that are familiar to the cultures of community members.
- What can and cannot be generalized and concluded from the data.
- What circumstances surrounded the time when the data were collected that might have affected the responses. For example, rates of a health condition may appear to "spike" during a particular time period. The spike could suggest an actual increase in the health condition or perhaps just an increase in the reporting of the condition due to a change in health policy or research practice. That's why it is important to ask if there were any major policy changes, demographic shifts or major events that influenced data collection during the time the data were collected.

Methods of Engagement

Now that you understand more about community, how to learn about the community's members and what it means to engage community members in a way that supports racial equity, let's discuss the methods for engagement.

A partnership between the evaluator, community leaders, funder and organization and other stakeholders that is focused on using the evaluation for collective learning and strategy improvement.

One way to involve community leaders in the evaluation is to establish partnership with them that focuses on making the evaluation culturally appropriate, useful and intentional about supporting progress toward racial equity. You could use this partnership to determine:

- Whether the methods are culturally appropriate.
- How the rest of the community might perceive the evaluation in relation to the initiative.
- How community members might receive the findings and potential use for the findings.
- Ways to communicate the findings beyond the community to ensure no harm comes from sharing them.

The learning partnership can be informal or formal. Most important, you want to be intentional about including and addressing the following as you establish the learning partnership:

- Clear criteria for selecting partnership members.
- A diverse group of people that is representative of the community's demographic make-up.
- Clear expectations about roles, activities and timelines.
- Clear process for decision-making.
- Time and space to facilitate relationship and trust-building among the participants.
- Fair compensation for their time and removal of any barriers to their participation (e.g., meetings outside traditional working hours if their participation cannot be part of their daytime job, language assistance, child care, etc.).

Large- and small-group discussions about the pathway of change.

Funders and organizations have their idea about the type of change they want to see and how the change occurs, but community members are the ones who have the lived experiences to know what it takes to achieve that change and what amount and type of change are feasible. You can engage community members directly to discuss the change process, or you can work with grantees to do this, depending on the circumstances (e.g., your proximity to the community of interest, the cultural appropriateness of you doing it directly, etc.).

Keep in mind that community members have responsibilities that might make it hard for them to attend a two- to three-hour meeting during the day, and you can consider conducting this discussion in the evening or on a weekend to accommodate these important conversations. If you choose to meet virtually, you must make sure that everyone has sufficient digital access and knows how to use the technology. You also need to consider language needs, in which case you can use simultaneous interpretation equipment or conduct separate discussions in a different language entirely.

During the discussions, it is important that you:

- Take the time to share your worldview about evaluation, what it means to use it in service of racial equity and how you plan to do this. Don't just talk about the importance of doing it, emphasize how (i.e., what you will do).
- Use approachable language. Don't use evaluation jargon (e.g., outputs, immediate outcomes and intermediate outcomes). You can use the questions suggested below to start. You can also invite participants to stop the use of jargon and ask for explanations in real time.
- Be prepared for push back because of any negative perceptions or experience the community members have had with evaluation in the past. You can ask the community members about their experiences, what made them negative and what a positive experience with evaluation would feel and look like.

There are a few ways you can invite community members to describe the pathway of change, including:

- You can provide them information about the inputs and the general outcomes desired, and then ask them—as an exercise—to write an article for the local newspaper about what happened, what specifically changed as a result of the initiative and how. You can do this exercise in small groups, see what each group comes up with, facilitate a large-group discussion about where the groups are similar in their views and expectations and where they are different and help build consensus about the final pathway of change that makes sense for their community.
- You can ask them the following questions to guide the discussion and development of a pathway of change:
  - Given the resources you have for the initiative, what do you expect to be different immediately? How will you know there is a difference? What will you see, hear or experience that tells you there is a difference?
  - What do you expect to be different after the initiative has been going on for more than a year? How will you know there is a difference?
  - Do you think there will be more or less fairness and justice for your community or certain groups of people in your community? Why do you think that? What does more or less fairness and justice look or feel like?
  - What do you think will help facilitate the work to get to that difference you just described? What could stand in the way of making that difference?
  - What do you think are the strengths in your community that can be leveraged to help make that difference? Where do you think you could use some more help?

Assistance with data collection.

It is not uncommon for evaluators to engage community members by asking them to help with data collection. Don't ask community members to help you collect data simply for the sake of doing it because it's cheaper, it's better for optics and/or you can't easily enter the community yourself. If you are going to engage the community in data collection be sure to ask yourself: **what's in it for them, not what's it in for me?** To do this type of engagement in service of racial equity you should also pay and train the community members for their efforts in data collection. (You should also consider paying community members for their time to advise or engage in the evaluation.) In addition, remember to put trainings in place that take into account the schedules and needs of community members. Perhaps that means running trainings on Saturdays and providing child care. At the same time, you have to make sure that asking community members to help you collect data does not put them in harm's way when they are going house-to-house to administer a survey or if others perceive them to have privilege and power by working with the evaluator. You need to provide them with adequate training and tools to collect quality data, navigate interpersonal relationships, maintain confidentiality and stay safe.

Large- and small-group discussions about the findings.

It is equally important to involve community members in the interpretation of the findings because they will have better insights into what was going on in the community or larger context that affected the outcomes, and they can validate the outcomes and trends. You can do any of the following to engage them:

- Present the findings and facilitate a discussion with the community members, using guiding questions such as:
  - What surprised you about the findings? What didn't? Why?
  - Are there other changes—positive or negative—that the initiative contributed to that are not captured in these findings? How do you know that the changes are connected to the initiative?
  - What events, circumstances and other forces might have affected or shaped the outcomes?
  - Do you think the initiative has helped make things more equitable and for who specifically? Why or why not?
- Share the findings with them and ask them, in small groups, to interpret, write or narrate the story of what happened. You will learn about which findings are important to the different participants—and how the findings are interpreted—based on what they emphasize in their stories. Their stories can also validate what you found as well as correct or sharpen any of the findings and interpretation of the findings.

Effective facilitation is essential

In all the activities described to engage community, you will notice that effective facilitation is key. If you have training and experience in facilitation, then you can incorporate the facilitation easily and naturally into the evaluation. However, if you don't, you might want to find a skilled partner for these tasks.

What is effective facilitation with racial equity in mind? There are many resources out there, especially about facilitating effective meetings. In addition to the advice offered by these resources, evaluators need to consider issues specific to privilege and power among the participants because of their race, gender, other demographic attributes and position in their organizations and/or communities. This guide does not go into detail about how to become an effective facilitator, but we've included resources at the end. For effective facilitation that keeps racial equity in mind, make sure your facilitation:

- Applies adult learning principles.
- Uses dialogue as the foundation for communication, which is more structured than conversation but less structured and adversarial than discussion or debate—it seeks to build understanding and supports inquiry, rather than advocacy for one's agenda or ideas.
- Has clear purpose and key takeaways for participants and is transparent about the process.
- Builds empathy to enable participants to see things from another person's perspective.
- Understands who the participants are that have privilege and power and gives them specific roles during the discussions to manage their influence (e.g., "observer" or "sounding board" that you can check in with during breaks).
- Has tactics to respond to language or behaviors that suggest racial and other forms of bias (e.g., call for a break and speak to the person separately, pause the discussion and address how the words or behaviors made others feel).
- Uses a cross-racial team of facilitators.

Section 4:
Decisions and choice points you will likely encounter

When you involve community members in the evaluation, there are certain types of choices and decisions you will encounter and have to make. While they pertain to different situations, they all have a common element. You will inevitably have to decide:

- How much time and resources you have to truly engage the community—within and beyond the budget you have for the evaluation.
- How and when to push back on the funder and organization if the budget and timeline do not allow for authentic community engagement.
- What trade-offs you have to make and communicate to the funder if the community cannot be engaged to the extent desired.
- Where your boundaries are in terms of your personal investment in the process and in the community.

Here are some example situations.

Community members you speak to and involve in the evaluation are disappointed, even upset, about the initiative and how funders' or implementing organizations' promise of change for racial equity and social justice is seldom kept.

It is common for community members to perceive you as an extension of the funder or organization or as having the ear of the funder or organization, and to share their feelings with you about the initiative and the funder. If you are perceived as a community member because of your race, ethnicity or cultural background, they may be even more open and direct and expect you to advocate on their behalf. You may hear these sentiments when you are introducing yourself, during data collection and during discussions about the pathway of change and the evaluation findings. As an evaluator committed to racial equity and using the evaluation as a way to help advance racial equity, you cannot ignore their concerns.

What you can do

You have to decide how much risk you are willing to take to push the conversation, especially if the funder or organization may not be open to criticism. You can do the following (none of the suggestions are mutually exclusive):

- Ask the community members if they have shared their concerns with the funder or implementing organization. If they have, you have to decide what you can do to amplify their concerns. If they haven't, you have to determine if the community members are willing to meet with the funder or organization to discuss their concerns, and how you could broker the connection.
- Raise this issue with the organization from the start, without revealing the community members' identities unless you have permission to do so, and discuss what will be different this time compared to the past.
- Query and, if necessary, challenge the funder or organization's involvement of community in the initiative.
- Use the evaluation as a tool to continuously and explicitly ask how the findings and knowledge generated are used to make improvements, not only in the initiative but in the relationship and interactions between the funder or organization and community members.
- Support the community members in their use of data to support their concerns and advocate for their community.
- Check yourself and make sure you have all the information necessary to facilitate the tension among all the parties, and where your own implicit biases about the funder, organization or community might be affecting your response.

After receiving a grant, community members share priorities and issues of concern that the funder may not be interested in, or even opposed to, supporting for a variety of reasons.

We have all encountered situations like this example: The funder's priority is prevention of teen pregnancy. When you conduct discussions with community members to understand their activities and progress to prevent teen pregnancy, the members tell you they are most concerned about the lack of quality prenatal care for Black mothers, regardless of the mothers' ages. While they understand the importance of pregnancy prevention, the immediate problem is the high rate of maternal illnesses among mothers in their community. What should you do as a practitioner of evaluation in service of racial equity? On one hand, the funder has been clear about what their priorities are and what they are not open to funding; on the other hand, the rate of maternal illnesses in this community has steadily increased in the past five years and the community needs funds and technical assistance to address this racial disparity.

What you can do

You have to decide how far to "push" the issue and do the following:

- Help the funder understand the importance of responding to the community's needs to build relationships and trust as part of supporting equitable change.
- Do some initial homework to understand the root causes for the increasing rate of maternal illnesses and help the funder connect the dots between teen pregnancy, maternal illnesses and the root causes so they can see how they might support the community within their funding and other priorities.
- Help the funder reassess their funding and selection criteria and grant expectations, especially if the funder intends to fund another cohort of grantees.

Influential community members consistently dominate discussions and offer opinions about the evaluation outside the discussions, and other members tend to stay quiet or are less insistent about their ideas.

There are several considerations to weigh in this type of situation, including:

- If the dominant community members have more power and where their power is coming from.
- Whether there are cultural differences—based on race and ethnicity, gender, language or age, for example—as well as biases of different types (e.g., racism, sexism, homophobia, transphobia) among the community members that impact how they express themselves in group discussions.
- Their perception of you, both in terms of your demographic attributes and your role as the evaluator, and how that might affect their responses to your questions.
- The way you set up, structure, facilitate and document the discussions that could enable this behavior.

What you can do

Take time to better understand the people and what shapes their interactions with you and each other, and then you can decide how to respond to the dominant community members to help them become aware of their behavior, to mitigate the risk of upsetting them, to solicit their help in encouraging others to speak up—and intentionally create space for other members to share their feedback and ideas. You may have to spend more time with the less vocal people outside of large-group discussions to understand their perspectives. You also can make more informed decisions about how to restructure and facilitate the discussions more effectively, including bringing in another person to facilitate, so you can participate more freely as the evaluator instead of as both the evaluator and facilitator.

The community has capacity needs other than the capacity to use data.

You may be working with community members to develop the pathway of change or discuss the use of data for a health equity initiative, and learn that the community struggles with advocating for systems and policy change. This capacity is important for the community to be able to ensure that their members have fair access to resources and opportunities.

What you can do

It is beyond your scope of work and capabilities to assist the community in this regard, but you can discuss this limitation with the funder or implementing organization to explore what resources, technical assistance or training can be offered to the community to build their advocacy capacity. You also might want to help the funder or organization connect the collection and use of data to advocacy.

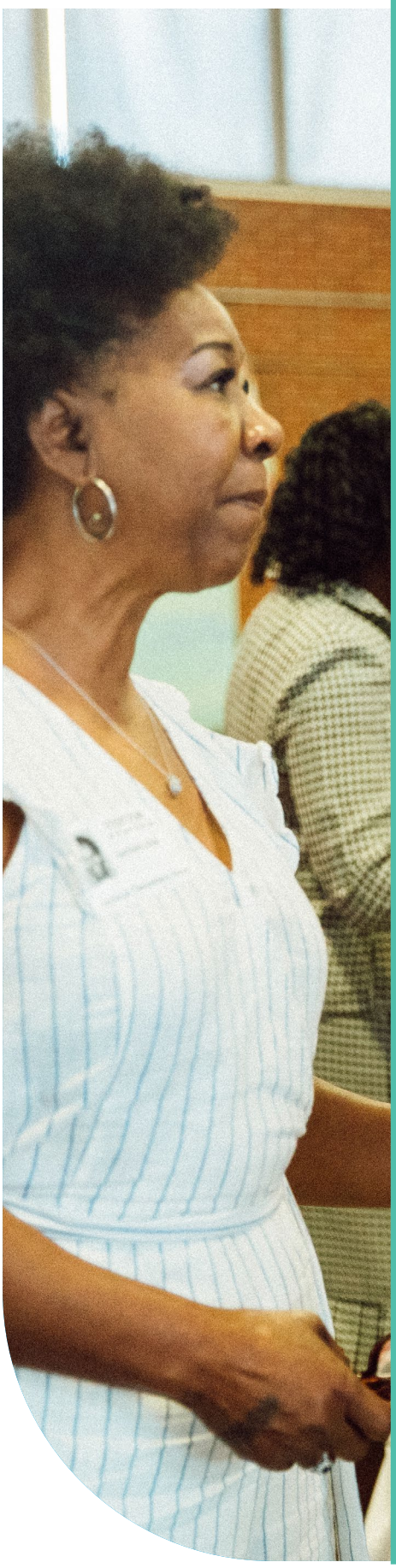
Elected leaders, public agency staff and other people who make decisions that affect the community perceive the community as lacking in strengths and assets, and use language that suggests only deficits in the community. This is especially common for low-income communities of color.

Studies show that community members frequently self-organize to support their members, resulting in informal and formal support networks to leverage the members' social capital and the community's strengths and assets (Felton & Shinn, 1992; Griffiths et al., 2009; Yeh et al., 2015). Often, the myth that communities of color have problems carries an implicit implication that people of color have to be "fixed" and are not capable of co-creating solutions that work for them.

What you can do

When you are conducting the evaluation, you have to call out language that suggests people of color as problems even if it causes friction and approach it as a learning moment for everyone about why the implication is inaccurate, how recognizing and understanding the community's assets and strengths can provide a foundation from which to design an effective intervention and evaluation and that the goal is to fix the system and not the people.

Engage communities to define the problem and fix the systems that are not working for them, not to fix the people who live in them.



A story for your reflection

Our organization was conducting a workshop about data collection and analysis for a group of nonprofit organizations that work in a city whose residents are majority Black. We were in the middle of discussing ways to engage community members in the evaluation. A popular method is to recruit people from the community to help collect data, especially in communities that tend to be suspicious of outsiders. Then, two people shared that while they understand the importance of having data collectors that share the same racial traits as the community, they have found it difficult to hire any Black researchers who are qualified. For studies they recently conducted, they advertised in the local universities' news bulletins and worked with faculty members they know to help identify Black students who might be interested and have the skills to administer a survey.

They managed to hire six Black undergraduate students to administer a survey in one of the neighborhoods in the hope that the students, being of the same race as the residents there, could convince people to complete the survey. According to the people who recruited the students, it was a disappointing experience because the students did not follow instructions and were unable to get the response rate they had expected. They simply can't find any good researchers of color, they said. At this point, several other Black participants in the workshop looked like they were upset and one person got up and left the workshop.

- What underlying assumptions and narratives are operating here?
- What criteria should be communicated in the recruitment of researchers to help with the data collection? Why?
- What training, feedback and other support should be provided to the people helping collect data, regardless of how much experience they have?
- What considerations need to be discussed with them about potential challenges and solutions?
- What would you have done if you encountered such a situation?
- Would you be comfortable or uncomfortable in that situation? Why?
- What additional skills, knowledge and tools do you think you'd need to respond to such a situation if you encounter it in the future?
- What skills, knowledge or tools you wish you had if you encountered such a situation before?

Take the perspective of the community members and see the "whole," find ways to build relationships, contribute to the community, connect the dots and weave a story that respects the community's histories and contexts.

While you have a scope of work and a budget for the evaluation, you are also working with a community of people that is made up of relationships. The budget most likely did not account for time to get to know people, reading or listening to news that is relevant to the community but not necessarily directly related to the intervention or evaluation and assisting the community with any matters that come up naturally and may have nothing to do with the evaluation.

What you can do

You have to make a choice about how far you are willing to go to take the perspective of the community members about what they want from the evaluation, build relationships and care for the community, which takes time and resources. This could include challenging the funder and their investment in the evaluation, or deciding that the evaluation is not worth doing because you can't tell a complete story. At the same time, you also have to take care of yourself and, if you work for a company, comply with the company's policies and practices. Where the boundaries are for you and/or your company and how much you are willing to take the perspective of the community are questions you'd have to answer.

Story for your reflection

Our organization conducted a study, funded by the local government, to evaluate an initiative to address day labor in the county. The day labor issue was especially contentious because day laborers tend to gather near a park, adjacent to an affluent residential area. We invited and convened several day laborers, neighborhood and civic leaders, advocates and legal counselors working with immigrants including undocumented immigrants and local government staff, to form a committee to guide the evaluation. We implemented several strategies to deal with the power differences in the meetings:

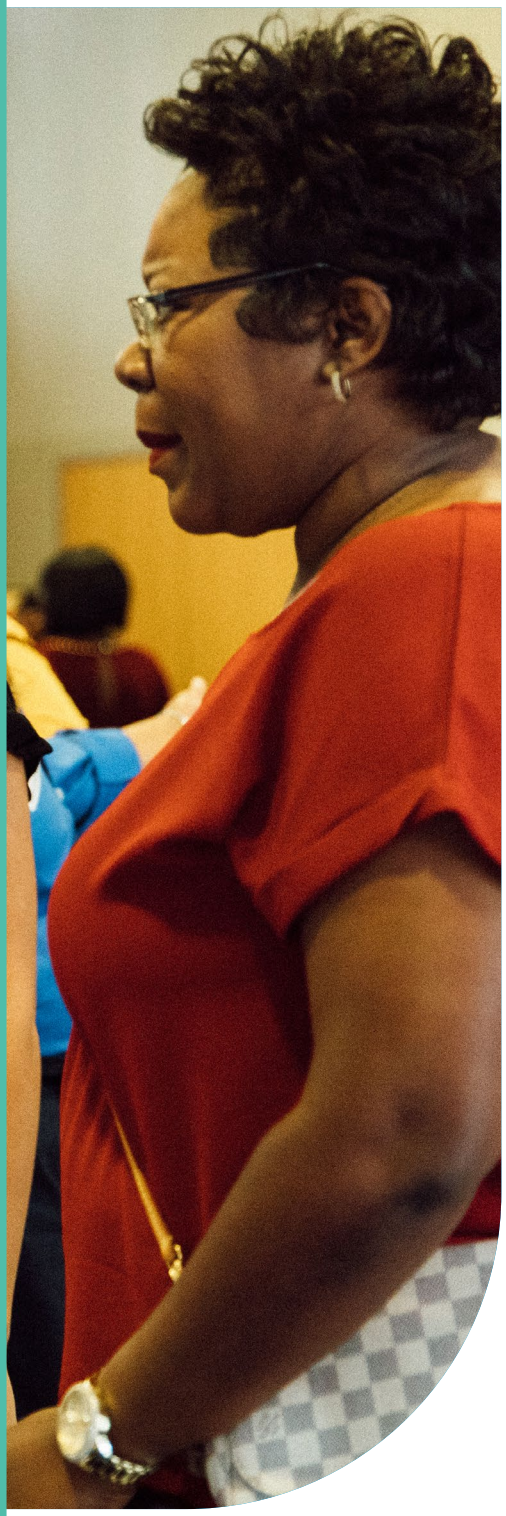
- The number of day laborers in the meeting was equal to the number of all the other participants to help increase the confidence of the day laborers to speak up.
- Each meeting was split into two parts—the first half was conducted in English and the monolingual Spanish-speaking participants used simultaneous interpretation equipment, and the second half was conducted in Spanish and this time, the monolingual English-speaking participants used simultaneous interpretation. (The second half did not duplicate the first half of the meeting.)
- The facilitators spoke either English or both English and Spanish fluently.
- We took time before each meeting to go through the agenda with the day laborers, prepare them to participate in the meeting and address any questions or concerns they had before each meeting. This was especially important because sitting down at the same table with government personnel was not an experience the day laborers had in their home countries or here in the U.S.
- We also took time to prepare the other participants and made sure that they understood the ground rules to address any implicit biases and demonstration of power that could have come up during the meetings.
- We were mindful to break down evaluation-related terms and discuss how the information shared during the meetings and generated by the evaluation would be used.

After a few meetings, the day laborers decided they needed to organize and appoint leaders from their community to represent them. By this time, we got to know the day laborers, many who were professionals in their home countries (e.g., physicians, engineers) and are now doing construction work. We learned about their hardships, the families they left behind and their perceptions of American culture. Our team made the decision to meet with the day laborers in the evenings to discuss their options for organizing and developing the leadership needed to interact with the local government and neighborhood leaders. An attorney who provided legal services to immigrants also volunteered to work with the group.

In response, one of the local government staff people contacted our team to let us know that the contract did not have sufficient funds for these "extra" meetings and we were going beyond the scope of our work. She was upset that we didn't inform her about these meetings. We made it clear that hours for the meetings in the evening were not charged to the contract at all; we were volunteering our time, much to the local government staff person's disbelief.

We believe the relationship-building we did with the day laborers helped us better understand their community, which would help us do a better evaluation.

- How would you have responded to the day laborers' wish to organize?
- How would you have responded to the local government's concern?
- What skills, knowledge and tools do you think you'd need to respond to such a situation if you encounter it?
- What skills, knowledge or tools do you wish you'd had if you encountered a similar situation before?



Conclusion

Community engagement is a prevalent concept and practice that many people buy into, no matter if they are the funder, program manager, technical assistance provider or evaluator. Funders, evaluators and other stakeholders have to be brought into the idea that effective community engagement isn't just the right thing to do, it actually enables leaders to make better decisions and improvements in approaches, strategies and actions. The challenge lies in the details of the community engagement process: Who are the community and subcommunities, who are the leaders, what are culturally appropriate ways to engage the community members, etc. It is not just about including some community members in a meeting, lifting up their voices in reports with the use of quotes or inviting them to present their work to funders during board meetings or site visits. Evaluators who practice evaluation in service of racial equity must attend to the details of community engagement, in spite of the amount of time and cost, because it leads to higher-quality data. This quality is essential to inform decisions that affect the lives of people who have been historically excluded and oppressed, and to facilitate progress toward racial equity. The investment in building relationships and engaging community members also leads to a more transformational use of the data for advocacy and change.

If we truly want racial equity, it's time to stop referring to community and discussing engagement in general terms. We need to get specific and commit to the communities we work in and with.

Resources

Publications and Papers

Auvine, B., Densmore, B., Extrom, M., Poole, S., & Shanklin, M., Fellowship for Intentional Community, Center for Conflict Resolution (1978). *A Manual for Group Facilitators.* CreateSpace Independent Publishing Platform.

Knowles, M. (1984). *Andragogy in Action: Applying Modern Principles of Adult Learning.* Jossey-Bass

Lora, K. (2011). Keys to effective facilitation. Paper presented at Project Management Institute (PMI) Global Congress 2011—North America.

Training and Web-based Resources

AORTA, a worker-owned cooperative devoted to strengthening movements for social justice and a solidarity economy. https://aorta.coop

Center for Equity & Inclusion. The CEI Equity Facilitation Intensive is an opportunity to foster personal growth and develop the facilitation skillset needed to lead complex and often challenging conversations, trainings or coaching sessions. https://ceipdx.org/facilitator-intensive/

Community Tool Box, Developing Facilitation Skills (including political discussions)
https://ctb.ku.edu/en/table-of-contents/leadership/group-facilitation/facilitation-skills/main
https://ctb.ku.edu/sites/default/files/chapter_files/facilitating_political_dialogues_workshop.pdf

Interaction Institute for Social Change, Fundamentals of Facilitation for Racial Justice Work.
https://interactioninstitute.org/training/fundamentals-of-facilitation-for-racial-justice-work/

NTL Institute, Human Interaction Laboratory.
https://www.ntl.org/human-interaction/

References

Bowman, N., Dodge Francis, C., & Johnson, S. (n.d.). *Enhancing Wisconsin Pregnancy Risk Assessment Monitoring Systems: Tribal Nation and Indigenous Outreach and Engagement Recommendations.* Shawano, WI: Bowman Performance Consulting.

Chavis, D. & Lee, K. (2015, May 12). What is community anyway? *Stanford Social Innovation Review.* https://ssir.org/articles/entry/what_is_community_anyway

Colby, A. (2018). *The Power and Purpose of Informal Community Leaders.* Stanford Graduate School of Education and Encore.org.

Endo, T., Joh, T., Yu, H. (2003). *Voices from the Field: Health and Evaluation Leaders on Multicultural Evaluation.* Oakland, CA: Social Policy Research Associates.

Felton, B., & Shinn, M. (1992). Social integration and social support: Moving "social support" beyond the individual level. *Journal of Community Psychology,* 20(2), 103-115.

Griffiths, R., Horsfall, J., Moore, M., Lane, D., Kroon, V., & Langdon, R. (2009). Building social capital with women in a socially disadvantaged community. *International Journal of Nursing Practice,* 15(3), 172-184.

Lee, K. (2007). *The Importance of Culture in Evaluation.* The Colorado Trust.

Maynard, E. (1996). The translocation of a West African banking system: The Yoruba Esusu rotating credit association in the anglophone Caribbean. *Dialectical Anthropology,* 21(1), 99-107.

McMillan, D. W., & Chavis, D. M. (1986). Sense of community: A definition and theory. *Journal of Community Psychology,* 14(1), 6-23.

Oh, J.H. (2007). Economic incentive, embeddedness, and social support: A study of Korean-owned nail salon workers rotating credit associations. *International Migration Review,* 41(3), 623-655.

Taylor, R. & Chatters, L. (2020). Church and family informal social support networks of African Americans. *Innovation in Aging,* 4 (1), 658,

Van Tilburg, H., Watson, T., Faria, K., Hoomanawanui, K., Ho-Lastimosa, I., Ritte, W., Maly, K., Naho'opi'I, M., Horcajo, K., Kaupiko, K., & Bali, D. (2017). *A Guidance Document for Characterizing Native Hawaiian Cultural Landscapes*. Honua Consulting.

Wang, L. (2017, January 24). Ethnic/immigrant associations and minorities'/immigrants' voluntary participation. *Voluntaristics Review,* 2(4), 1-95.

Yeh, C., Borrero, N., Lusheck, C., Plascencia, L., Kiliona, K., Mase, M., Suesue, T., & Tito, P. (2015). Fostering social support, leadership competence, community engagement, and resilience among Samoan American youth. *Asian American Journal of Psychology,* 6(2), 145-153.