

PRACTICE GUIDE SERIES

Doing Evaluation in Service of Racial Equity

Diagnose Biases and Systems



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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 #2:**

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**.

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W.K. Kellogg Foundation

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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 term 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: Diagnose biases and systems

Why focus on biases and systems?

Everyone has racial biases, whether they like to admit it or not. They can have a stereotype—positive or negative—about a racial or ethnic group and when they meet someone from that group, they often treat that person differently without even realizing it. It is important to recognize that implicit biases are deeply rooted and that even individuals with the best intentions can have them. Good intention or not, racial biases can cause harm. And it is up to the individual feeling the bias to decide if it is harmful—saying “that wasn’t my intention” does not change the outcome for the person or community on the receiving end. This is why it is so important for us, as evaluators, to put in the time and work to uncover and address our implicit biases so we can better understand ourselves so we can make better decisions and bring attention to others in our circles.

As evaluators, we also have to be intentional about approaching every evaluation with a systems lens especially in service of racial equity. This systems approach is essential because racial inequity is the consequence of longstanding, complex and interwoven systems. A systems lens allows us to examine those complexities to better understand why certain patterns and trends keep recurring, despite the amount of investment by philanthropy and government to change those patterns and trends.

If you don’t accept racial inequity as a systemic problem or don’t believe that you have a responsibility to understand and work to address the systemic issues that contribute to certain patterns and trends of behavior, you are part of the problem. You could be undermining and even harming people in the communities you are working to serve. The following sections help you how to better serve people and communities of color as an evaluator.

We understand this may not be easy to think about or admit. However, it is time to be honest with ourselves and move forward with that new information, regardless of how uncomfortable it may be. Without equitable access, opportunity and consequence in sectors that provide basic needs such as education, health, housing and more, we will not achieve racial equity. You have a responsibility to ask why certain patterns and trends of behaviors keep recurring. And a systems lens can help you find answers. See the resources at the end of this guide for more.

In this guide, we'll explore how to become aware of our implicit biases and to understand and diagnose systems. It is organized into four sections:

- 1 Sample Scenarios:** Illustrates how racial prejudice and racial inequity can show up in a seemingly benign way with serious implications.
- 2 Implicit Bias:** Describes three types of biases you might be maintaining as part of your evaluation practice, despite your best intentions to promote racial equity.
- 3 Systems Lens:** Explains the use of a systems lens in an evaluation designed to help advance racial equity.
- 4 Choices and Decisions:** Contains a set of situations you might encounter when conducting an evaluation that is in service of racial equity and the choices you might face.



Section 1:

Sample scenarios—What do racial prejudice and racial inequity in evaluation look like?

This section uses two scenarios that illustrate how racial prejudice and racial inequity can show up in seemingly benign ways in evaluation but can have very real and serious implications.

Research has shown that exposure to violence affects children's emotional, mental and social development, and that young children present during violent situations don't have the ability to advocate for themselves. Addressing this issue requires a tailored, holistic response to these children's needs. Child welfare agencies, first responders, family courts, women's shelters, support groups for perpetrators of domestic violence, schools, family resource centers and behavioral health services all play a role in the response but are separated by their distinct philosophies, perspectives and functions.

More than a decade ago, Community Science evaluated a national initiative to reduce the impact of exposure to violence on young children and their families and better treat the affected child as a whole person. This initiative had the potential to change institutional policies, procedures and practices and ensure equitable access to behavioral health resources for Black, Latino, Asian American, Native American and Alaska Native families. Community Science examined the way the organizations mentioned above incorporated the histories, cultures and community contexts of these racial and ethnic groups into their policies and practices, and how all that worked together to form a responsive system.



A system has a purpose and typically consists of parts such as programs, organizations and other entities, relationships or connections between the parts, a structure that holds them all together and feedback loops that are intended to maintain the system.

Urban, rural and Indigenous communities participated in the initiative. They each established a coalition that worked together to create a holistic, systemic response to young children exposed to violence and their families. The desired results were sustainable systemic changes that would make it more likely and easier to identify children exposed to violence, refer them to the appropriate services and treat them for any psychological harm caused by the exposure.

Context, culture and history were important variables in all of the communities. These two scenarios specifically related to the Native American and Alaska Native communities involved. These communities were producing different outcomes than their counterparts and the funder was concerned. When the Community Science evaluation team probed the program staff in the communities and the consultants who worked with them about this concern, the following exchanges took place.



Scenario 1

“Why is the tribe still in the planning stage? They should be implementing the program by now. The other communities have already started to report the number of children identified and set up a system to refer the children to services,” the funder said.

The local evaluator, who was not Native American responded, “The staff at the tribal agency are still developing the implementation. It is hard to rush them because in Native cultures, the concept of time is not the same as in Western cultures. We have to respect their culture.”

Let’s dive a little deeper into the local evaluator’s response. Is the concept of time really the issue here?

Highly unlikely. The explanation “excused” the Native American grantee’s performance with a stereotype about their culture, and reinforced the funder’s concerns about the grantee’s capacity to achieve the desired outcomes. While the concept of time may be different, it does not mean that Native American leaders ignore deadlines and don’t have a sense of accountability.

What is the real issue here?

- The local evaluator and the funder are not Native American and have not taken the time to engage the Native American community and systemically learn about the community, the culture and traditions. Their implicit biases played out under the guise of cultural competency.
- Funders often take a “one-size-fits-all” approach to technical assistance and training. Communities of color and organizations led by people of color, especially local organizations with fewer connections and resources, often need more tailored assistance because of their unique contexts and histories.

Scenario 2

According to the technical assistance provider, “The psychologist may be White but he has lived in Alaska for a long time. He is highly qualified and has years of experience providing behavioral health services to families and children. There is nobody else in the community with the same qualifications and certifications needed to provide psychological services. He reported that the few families that were referred to him came for the first couple of sessions and then stopped coming after that. He has not been able to get a hold of them to find out why.”

The funder responded, “This may explain the low number of children referred and treated in that community. This has been such a problem grantee. It’s too bad they can’t show successful outcomes like the other grantees. Maybe I just need to accept that mental health issues are taboo and Alaska Native families are not as open to getting help as other families are.”

Let’s dive deeper into the above conversation. Should the White psychologist be accepted by the Alaska Native families because he lives in the same community and are his qualifications appropriate for people from a different culture?

The explanation puts more value on professional qualifications and certifications received from academic institutions than on Alaska Native healing practices, and assumes that length of time in a community is the main condition for acceptance and cultural competency. Living in an area for a long time, even among members of an underrepresented group, does not make you a part of it or necessarily even culturally competent in regard to that group. The explanation also reinforces the funder’s perceptions that Indigenous cultures are not open about mental health issues or willing to seek help.

What is the real issue here?

- A clinical solution to the historical trauma experienced by Native American and Alaska Native communities is both inappropriate and ineffective (BlackDeer & Silver Wolf, 2020; Kenney & Singh, 2016; Kirmayer et al., 2014). The grant program requirements needed to allow for culture- and community-based solutions that may have looked different and may not have been perceived as evidence-based by traditional science, which has been dominated by White male scientists.
- The funder framed the problem, determined the solutions and developed pre-conceived criteria for success without engaging the grantees or individuals from the community. Consequently, there was little room to explore the problem and solutions from different angles and uncover and address the implicit biases and structural inequities that could impact the initiative.
- Similar to the first scenario, the funder took a “one-size-fits-all” approach and did not plan for more customized support for any grantee presenting different results.

Here are the implications of the above scenarios:

- 1. A systems lens (a way of understanding, identifying and examining systems) is limiting if it does not intentionally and explicitly consider racial equity and, in the situation of Indigenous communities, the distinct history of colonization.** In the above example, the funder, partners and stakeholders did not look at systems change through a racial equity lens or unpack the issues of colonization and tribal sovereignty (Bourgeois, 2020; Bowman & Dodge Francis, 2018). Had they done this, they would have been more likely to:
 - Identify the need to address the historical trauma experienced by Native American and Alaska Native communities due to their history of being colonized.
 - Uncover the implicit biases held about their people and cultures.
 - Discuss issues of power between tribal agencies and state and local agencies and the sovereignty of Native American and Alaska Native tribes.
 - Select more appropriate outcome indicators.
 - Ensure that customized support was provided to the Indigenous grantees.
- 2. Everyone has biases that influence their perceptions about and behaviors toward people and cultures different from theirs, even if they have good intentions.** We have to stop and reflect on these biases because these biases can turn into harmful myths, stereotypes and narratives, and consider how they shape the framing of problems and solutions. In these examples, if someone had challenged the stereotypes, the team might have been able to better understand why the grantees were perceived as underperforming and come up with an alternative approach for that community.
- 3. Evaluators can, and should, act as social change agents, and this may mean being a disrupter.** As individuals, we all need to challenge assumptions, stereotypes and misinformed preconceived notions. For evaluators specifically, this is critical as those assumptions and notions can have a negative effect on the communities that are supposed to benefit from our work. However, because evaluators are trained to think that any intervention on their part can bias the findings and their role is limited to evaluation, they try to be neutral in their opinions and actions. None of us are neutral. We all, even the best evaluators among us, have implicit biases we carry with us. The good news is, we can work to uncover and address them. Evaluation training has to evolve to help evaluators act as social change agents while still being scientifically principled in their work.

Section 2:

Implicit biases specific to evaluators

Becoming aware of and addressing our implicit biases will not happen overnight and there is no single or simple tool to address them. It is work—a continuous process and a self-reflection journey that can at times be uncomfortable.

The scenarios in Section 1 showcased the types of implicit biases that evaluators are inclined to have. **As evaluators, these implicit biases are activated when we process information to develop evaluation questions, design approaches, analyze data, present conclusions and provide recommendations for improvement.** These biases also affect how we use evaluation to help people who fund, design and implement solutions that aim to contribute to equitable outcomes for people of color.

There are three types of implicit biases we are prone to hold as evaluators:

- How we frame evaluation questions.
- What data and evidence we are more likely to believe.
- What self-interest might be driving our decisions (Moody, 2019).

As John A. Powell, director of the Ongoing & Belonging Institute at the University of California Berkeley, asserted, **racial biases typically come from not caring and/or not wanting to know something** (Lyubansky, 2012). This means we have to care deeply about racial equity, we have to be curious and want to understand why inequity happens and most important, we have to want to do something about it. If this describes you, here are some tips for how to get started:

- **Decide that advancing racial equity and social justice is a driving force and a practice for you as an evaluator.** Make that commitment to yourself and to the communities that your work impacts. This means that you:

- Design your publications, presentations and engagements to bring attention to disparities, unequal treatment, unfairness and injustice experienced by people of color.
- Do something about it through data, research and evaluation.

As you affirm and reaffirm this commitment, you'll find that the lens you use for evaluative thinking will start to change.

- **Read, listen and immerse yourself in conversations about the history of racism and related issues.** Work to understand different perspectives, become familiar with concepts, reflect on your assumptions and get comfortable being uncomfortable. Find peers who can push you and support you through the discomfort. In seeking out these conversations, remember that it is no one else's job to educate you (especially people of color who are often expected to take on that additional, very often unpaid, burden). Educate yourself first so you can have thoughtful conversations.
- **Keep developing your systems lens in service of racial equity.** Continue to think about systems, power dynamics and issues about tribal sovereignty and their possible implications to your work and the communities you serve. (More on systems lenses later in this guide.)
- **Check yourself.** Watch out for common biases you are prone to maintaining despite good intentions. These are implicit and unless you become fully aware of them, you are likely to inadvertently keep exercising them.

Tips for self-reflection

Our role as evaluators in efforts to achieve racial equity starts with us: our ideas of how the world works that guide our perceptions, behaviors and relationships (i.e., mental models) and our implicit biases.

Here are some questions to repeatedly ask ourselves in every engagement we agree to:

- How open am I to examining my own mental models and how to change them?
- How much time and effort am I willing to invest in learning about different ways to look at the problem and solution, talking to the people who are impacted and developing a community of peers who can help me see my blind spots?
- To what extent do I believe that the histories of different racial and ethnic groups in this country are interrelated and, as a result, racial inequity has an impact on everyone?
- To what extent do I believe that addressing racial inequity in my work makes me less scientifically rigorous?
- To what extent do I believe that as an evaluator, I am not independent of—but an integral part of—the problem of and the solution to calling out unfairness and injustice?

No matter how well-intentioned or committed to racial equity I perceive myself to be, I have to continuously strengthen my capacity to:

- **Be accountable.** Work to:
 - Understand the struggles faced by people of color, immigrants and low-income families.
 - Challenge the underlying systems that seek to maintain the status quo.
 - Hone my ability to know when to come across as the bridge builder, activist, disrupter, etc.
 - Correct misperceptions and help make new connections as this work can cause discomfort for privileged and White people who are not aware or informed of these issues.
- **Be courageous.** This work can mean:
 - Expressing an unpopular view about racism or other forms of oppression.
 - Risking unfiltered and misinformed responses to my views on social or other media.
 - Losing a relationship, or even my job, if I believe that a particular solution or approach could do more harm than good to racial equity in the long run.
- **Be curious.** Keep learning by:
 - Not taking anything at face value.
 - Asking why.
 - Doing my homework.
 - Keeping the larger systems in mind.

Preconceived notions and misconceptions that shape evaluation questions



Even before we develop an evaluation question, we are processing information that shapes that question. The lack of attention given to conditions and systems that contribute to the disparities historically disadvantaged and marginalized racial groups experience is a common issue in evaluations of programs and initiatives to improve outcomes for these groups. We can better design evaluation questions by asking:

Are the evaluation questions framed to focus on the individual as the problem and individual-level change as the outcome, or on the systems and systems-level change as the problem and outcome?

The answer depends on our inclination (and that of our client's) to present the situation in a way that supports preconceived notions that the problems facing people of color are primarily due to individual and community deficiencies. This sort of framing does not serve racial equity because it does not recognize or investigate the underlying structures, relationships, power differences and histories that contribute to the patterns of behavior. Here are three examples of such misconceptions, actual systems issues at play and the implications.

1 **The misconception: Blacks have poor health outcomes because they have unhealthy eating habits and don't like to exercise.**

The systems issues: Fresh and healthy food can be inaccessible and unaffordable. There can be a lack of safe recreational facilities. Quality preventive health care can be inaccessible and unaffordable. There can be a mistrust of the medical community due to a history of experimentation in Black communities.

The implications: The evaluation may find no or limited changes in Black participants' eating and exercise habits because the impact of the systems issues far exceeds any individual behavioral change that can be made.

2 **The misconception: Latino youth have low academic achievement because their parents don't care about education.**

The systems issues: Some Latino immigrant parents have jobs that extend beyond the traditional hours of 9 a.m. to 5 p.m. They may have to work two jobs to be able to afford a decent standard of living. In their home countries, school principals and teachers are considered figures of authority; the education of their children are left up to these individuals. In the U.S., PTA meeting times and communication are inaccessible to them and culturally and linguistically inappropriate.

The implications: The evaluation may attribute the low performance of a school to the high percentage of immigrant students and families in the school and neighborhood.

3 **The misconception: Immigrants don't participate in civic activities and don't bother to learn about their civic duties. They only care about their own people and their countries of origin because they send money back to their home countries all the time.**

The systems issues: The conversations and meetings in those civic activities are unwelcoming, and the materials may only be available in English. Some immigrants come from countries where their lives would have been endangered for participating in any civic activities, especially those that relate to political outcomes. The economic conditions in their home countries are dire and they want or are expected to contribute to their families' finances.

The implications: The evaluation may report low rates of participation in mainstream civic activities (e.g., attendance at local public meetings, contribution to charitable organizations such as Goodwill and the Salvation Army and serving on boards). The evaluation may not have measured participation in civic activities that are culturally more familiar to immigrants.

Bias about data sources and the evidence they produce

Bias based on how we view data and evidence can show up in two instances during our evaluation:

- When we are reviewing information to support a theory of change.
- When we are deciding which methodology to use.

In the first instance, when we are reviewing and synthesizing the literature, we should ask ourselves:

- Am I ignoring research and evaluation findings that do not fully support my preconceived notions about a particular racial group?
- How do I determine which information is real?
- Which information or evidence am I more likely to believe?
- Which trend would I be curious enough about to further investigate and why?
- How might my preference about which information to use to make my case cloud my framing of evaluation questions and decisions about which methodology to use?

In the second instance, our data bias can influence our decision about which methodology to use—thereby potentially impacting our findings and conclusion. Our findings and conclusion can influence funders' decisions about renewals, perceptions about a particular racial or ethnic group and knowledge about what works and doesn't work to achieve racial equity.

For example, the use of experimental design, while effective for controlling variability in an intervention's implementation and the environment in which it is operating, is not appropriate for community and systems change interventions that are early in their developmental cycle. However, this has not stopped researchers or evaluators from using the experimental design for community and systems change interventions at all stages of development because it is considered by some to be the gold standard for scientific rigor. Consequently, the evaluation may contribute to inappropriate conclusions and generate the wrong lessons.

On the other hand, some evaluators may be inclined to believe that communities of colors' experiences and outcomes cannot be meaningfully quantified and therefore, qualitative data and stories are more compelling. Therefore, case studies, Most Significant Change approach, Photovoice, and ethnography are preferred. However, qualitative methods may not be adequate to capture the full impact of a community and systems change initiatives. They also limit the ways we can understand the intervention and situation. Diverse methods are better because they can help us see the problem, process, outcomes and context in different ways. (See Guide 1: Debunk Myths for more discussion about preferences for quantitative versus qualitative methodologies.)

Inclination to promote your point of view, approach, beliefs and interest in general

Unlike the two types of biases described above, this last bias is less implicit. We are more likely to be conscious about making decisions that promote our point of view, our approach or our beliefs, values and interests. We may also have to consider other issues such as those related to our livelihood as evaluators. For example, if you are an independent consultant, you may make a decision based on your economic security vs. your personal beliefs. If you are part of an evaluation firm or a nonprofit organization, you may make a decision based on your organization's interests vs. the needs of the community that will be impacted by the evaluation.

Here are some examples of how personal belief bias can show up in evaluation:

- The funder or organization's model for addressing economic inequity is better than any you have seen because it deals with all the limitations of other models and supports what you think is needed to achieve economic equity.
 - Your enthusiasm for the model could cause you to ignore the new challenges posed by the model, thereby impacting the data you collect, analyze, interpret and report.
- You have an opportunity to test your own evaluation framework and show its relevance for examining the effectiveness of the strategy you have been engaged to evaluate.
 - The framework may not be appropriate, but because you are so excited about proving the value of your program and expertise, your decision to apply the framework could go unquestioned.
- You believe that mentoring as a strategy for dealing with poor academic achievement among Black students is inadequate. The best strategy instead is to deal with the root causes.
 - You could be inclined to amplify the negative results in your evaluation report.

This bias can also be larger than you as an individual. Since you may have to win contracts for the consulting firm you work for, you may make decisions based on the firm's self-interest. If you are a faculty member at a university, your decision may be based on the need to get grants and publish to secure tenure.

These are realities evaluators face. The decisions we make take place within a constellation of forces, conditions and issues in philanthropy, evaluation and consultancy that are not always within our control. We have to be honest and mindful of how our decisions can impact the evaluation outcomes with racial equity in mind.

Checking our own biases is necessary but insufficient. It is equally important that we are able to view the initiative or strategy we are evaluating through a systems lens that is explicit about racial equity. This lens can help us take our practice one step further, from recognizing where our implicit biases might lie to how we diagnose the problem and evaluate the process and outcomes.



Using our power to address implicit biases

A form of power is our ability to influence others through our evaluation practice. When we are reflecting on our own biases and those of our team members, we can wield our power—consciously or unconsciously—in a few ways in service of racial equity.

- We could require everyone in our organization or team to develop the skills to check their own biases, apply a systems lens (see next section) and select the most appropriate methodology. If you don't have this power in your role, you could engage leadership to strengthen their ability to conduct evaluations in service of racial equity.
- We could assert our expertise to shift the funder's, partners' and other stakeholders' thinking about supporting evaluations in service of racial equity, and to re-examine their theory of change and strategy through a systems lens. If you don't have this power, you could speak to people within these individuals' network to rally their support.

Section 3:

Facilitating evaluations in service of racial equity requires a systems lens


In this section, we will first define what a system is and then discuss what a systems lens and lever of systemic change mean. With this foundational knowledge, we can then discuss how to apply a systems lens.


What is a system?

A system has a purpose and typically consists of parts such as programs, organizations and other entities, relationships or connections between the parts, a structure that holds all these together and feedback loops that are supposed to maintain the system (Meadows, 2008). Policies, regulations, connections and practices of institutions (public, tribal, private) in sectors like education, housing, transportation and health can function to prevent or limit people of color's access to resources and opportunities. The institutions in all these sectors are interrelated, where a change in one can trigger a change in another—for better or worse.



Exhibit 1 illustrates an education system (*purpose*) that is composed of:

 **Entities** that include the school board, local school district, schools, kindergarten programs, parents, students and parent teacher associations (PTAs).

 **Relationships** between parents and the school, the school district and the schools, high school and colleges and parents and PTAs.


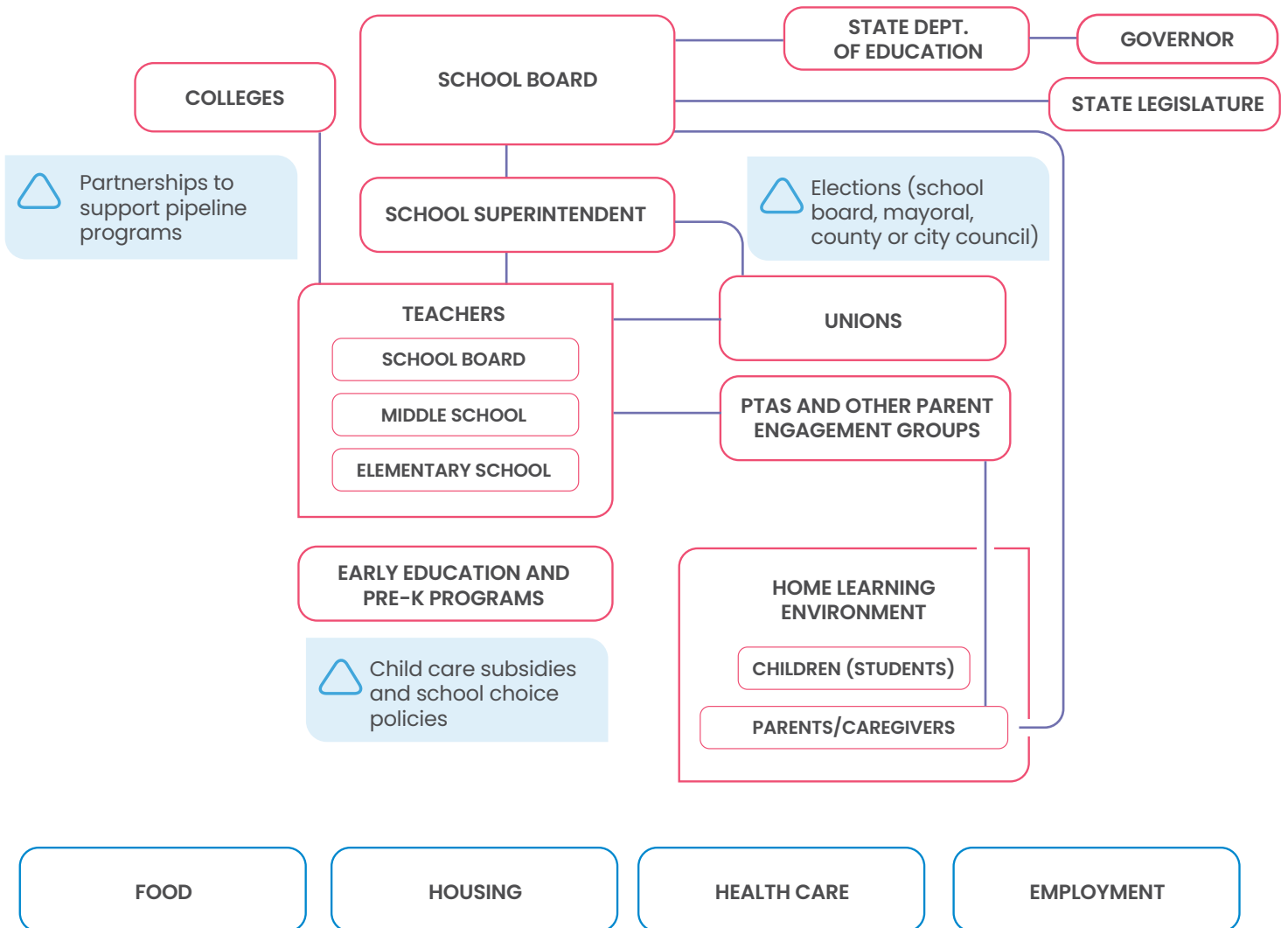
 **Structures** that hold the entities and relationships together such as partnerships, elections and school choice policies.

Exhibit 1: An education system



The system is maintained by feedback loops such as parents providing feedback to schools through PTAs and other parent engagement groups, and also to the school board by electing people they feel best represent their interests. (The relationships and structures between entities can vary by state, county and city.)

Systems are large, multi-faceted, interdependent and messy, which makes them hard to “see,” break down and change (Meadows, 2008; Stroh, 2015). Our property taxes finance the school system. A high-quality school system can attract families with higher household incomes as well as more businesses to the county. More businesses mean more jobs. Employment opportunities can attract more people to the county who can afford higher-priced homes and pay more property taxes, which then generates more resources for the schools. This loop is self-perpetuating.

However, this loop can also displace existing residents who cannot afford the rising cost of housing. They may have to move to areas with less expensive housing, which means poorer-resourced schools. These schools may attract teachers who are less qualified because the pay is not competitive. This could lessen the families’ and their children’s access to opportunities and resources offered through the schools and potentially other organizations.



The interdependency of systems can go on and on, as shown by the way the education system connects to housing, employment and other systems in Exhibit 1. The education system can be generalized to any community, and unless we are intentional about identifying and examining where in the system people of color are disproportionately impacted, we risk not shifting systems to become more equitable. (More about this in the next section.)

Ask yourself, what happens when there are racial disparities in education? How do you apply a systems lens to eliminate education inequity?

What is a systems lens?

A systems lens helps connect what we see and experience as unfairness and racial discrimination to the part, relationship and structure that cause the unfairness and discrimination—all within the context of the social, cultural, economic and political environment of the people impacted by the systems. These parts, relationships, structures and their interconnectedness are not always obvious and this is why this lens is necessary. This lens also allows us to identify ways to create change and promote racial equity.

Progress toward racial equity is not possible without systems change

We can have systems change without impacting racial equity because the change may not have any impact on people of color. On the other hand, we cannot have racial equity without systems change. We have to be intentional, focused and strategic from the start of any initiative to identify, name and deal with unfair and unjust policies, practices and actions for people and communities of color.

What does this lens look like? Exhibit 2 uses a tree to depict ways to address racial inequity. This is an adapted version of the iceberg metaphor, a popular way to illustrate a systems lens. The tree is used here to emphasize the need to deal with the “root” causes of racial inequity. What we can observe in a racially inequitable situation are racial disparities in education, health, housing and other conditions (these are the branches and leaves). These disparities are perpetuated by patterns and trends that are less easy to observe, but are identifiable through analysis of data (the tree trunk). These patterns and trends persist due to the way in which systems are set up and function (roots beneath the ground or soil line). Finally, the systems function the way they do because people’s mental models about how things should work become baked into the systems over time. These mental models are often hard to extract, analyze and challenge, and eventually become verbalized as narratives (the roots that are deep in the ground, including lateral roots that indicate the spread of these mental models and narratives).

The basic idea is this: we have to dig deeper and deeper to determine the root causes of the unfairness and injustice to understand why different racial groups experience disparate outcomes, and where change needs to happen.

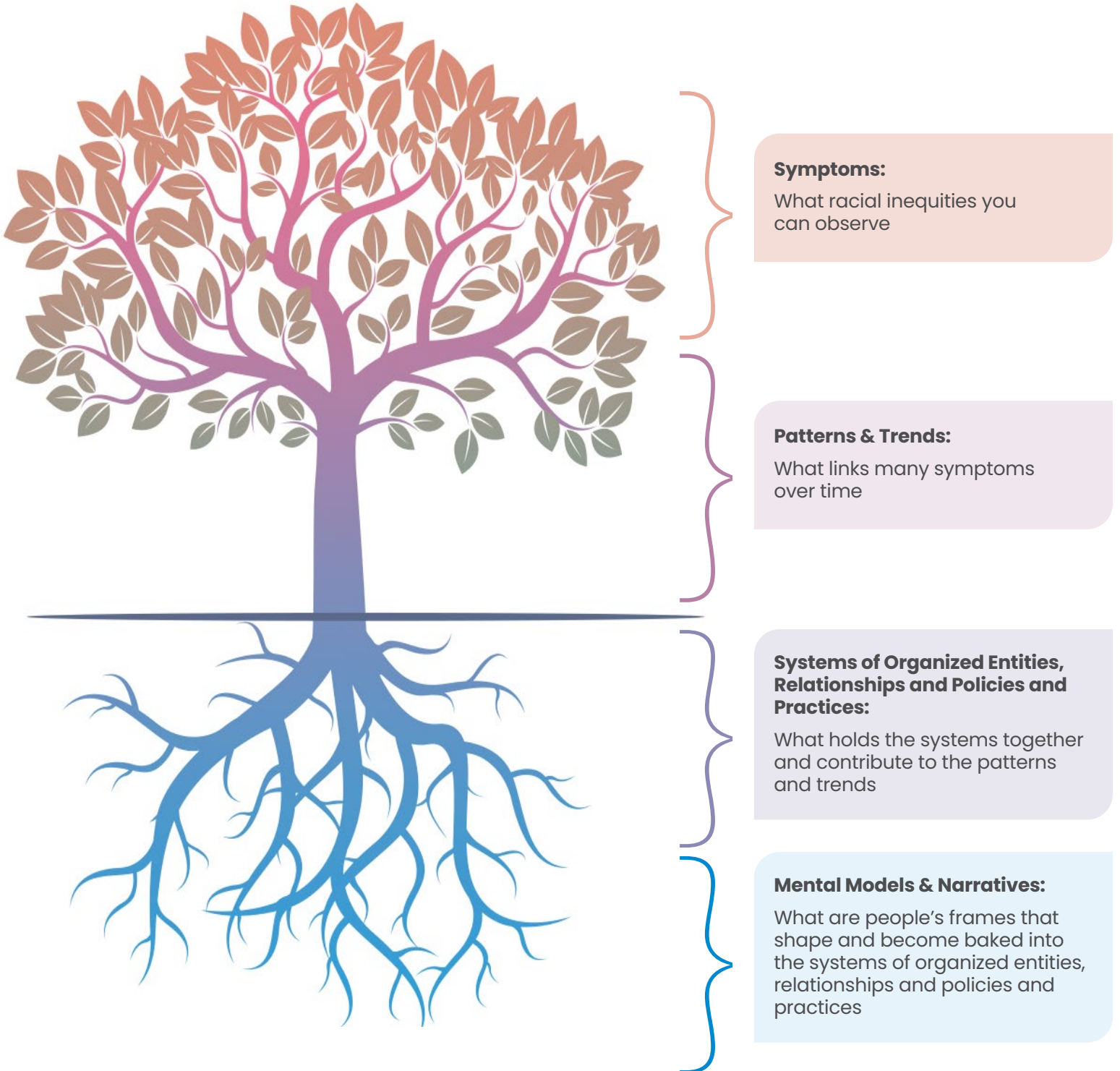


Developing a systems lens helps you be more equipped to:

- Help your client and other stakeholders recognize that racial disparities and other inequities are due to the way systems are designed and interact—not individuals' actions, circumstances or racial and other biases.
- Determine what to measure in efforts designed to move the needle on racial equity.
- Interpret and explain how the changes to move the needle on racial equity occurred—fully, partially or not at all.
- Place the process and outcomes within a larger context of conditions—both enabling and impeding—related to the social, cultural, economic and political environment.

This can help funders, partners, and other stakeholders align their intent (e.g., desire for equity) and their initiatives.

Exhibit 2: A tree metaphor to understand racial equity



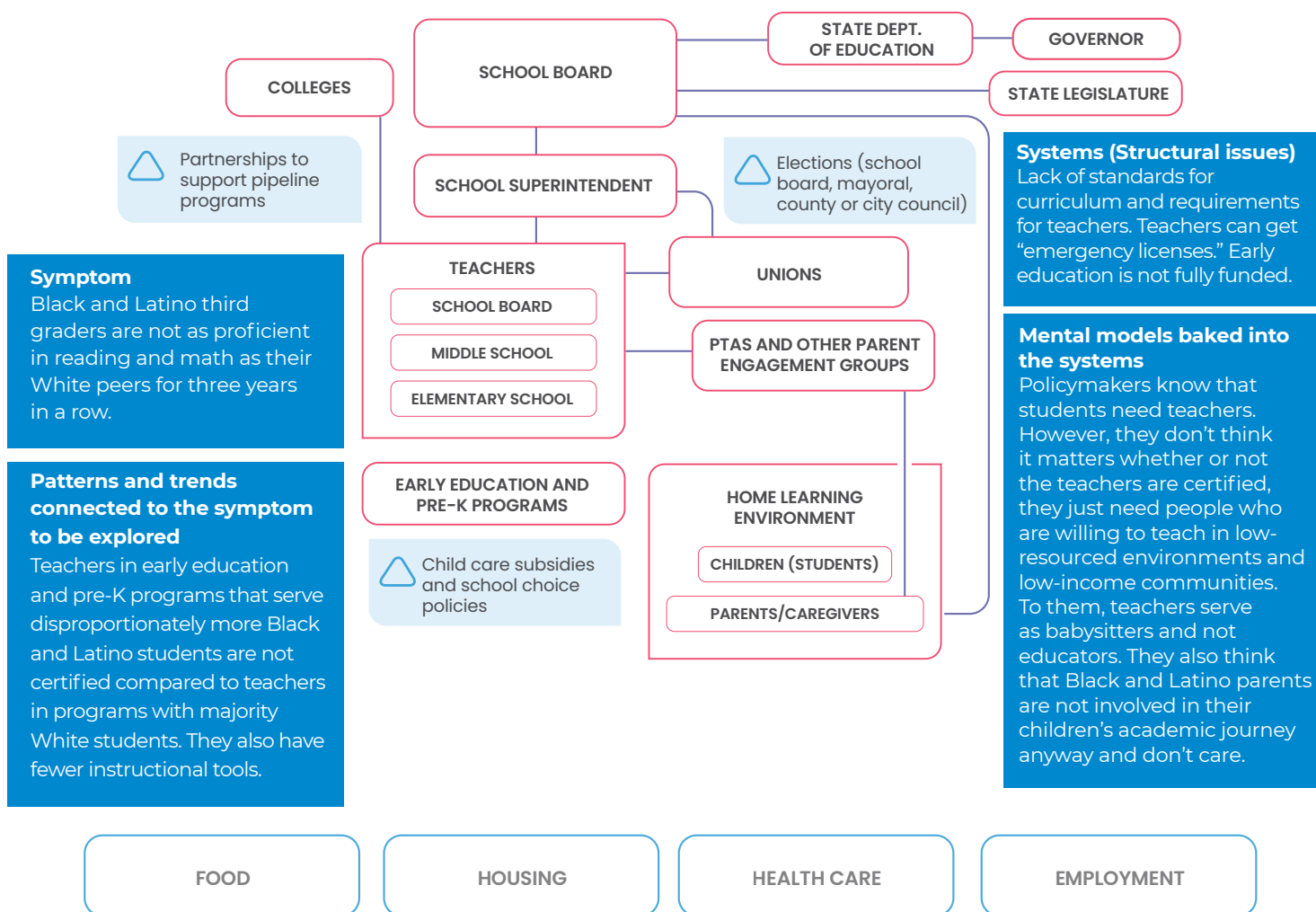
Using the same illustration in Exhibit 1, Exhibit 3 overlays the systems lens to show how you can dig deeper to identify where there is unfairness in the system that contributes to the disparity in reading and math proficiency between Black and Latino third graders and their White peers (this is the symptom that is observable).

As teachers are part of the education system, you might start by investigating the quality of instruction in the programs that disproportionately serve Black and Latino children (this is an example of a pattern or trend that is connected to the symptom). If you find that the quality is inadequate, you then explore the

possible underlying reasons. One reason could be the lack of standards for what constitute an effective curriculum and qualified teachers. Another could be the fact that early education is not fully funded by the state (these are examples of structural problems in the system).

If you approach the problem of disparity in reading and math proficiency as an individual problem instead of through a systems lens, you would focus primarily on the Black and Latino third graders' abilities and their home environment.

Exhibit 3: Applying a systems lens to an education system



What is a lever of systemic change?

A lever of systemic change refers to the point in a system that will have a catalytic, multiplier or amplifying effect on the patterns and trends that keep producing the disparate outcomes. You can start identifying levers by looking for where there is and isn't power. Identifying who has the power to push that lever is part of the racial analysis to inform the theory of change and strategy to eliminate the unfairness and injustice that disproportionately affects people and communities of color. The theory of change and its illustration as a logic model are useful tools to check the application of the systems lens. It's where our mental models and implicit biases can show up. Details about how to develop a theory of change and logic model are described in the Step-by-Step Guide to Evaluation (2017) published by the W.K. Kellogg Foundation.

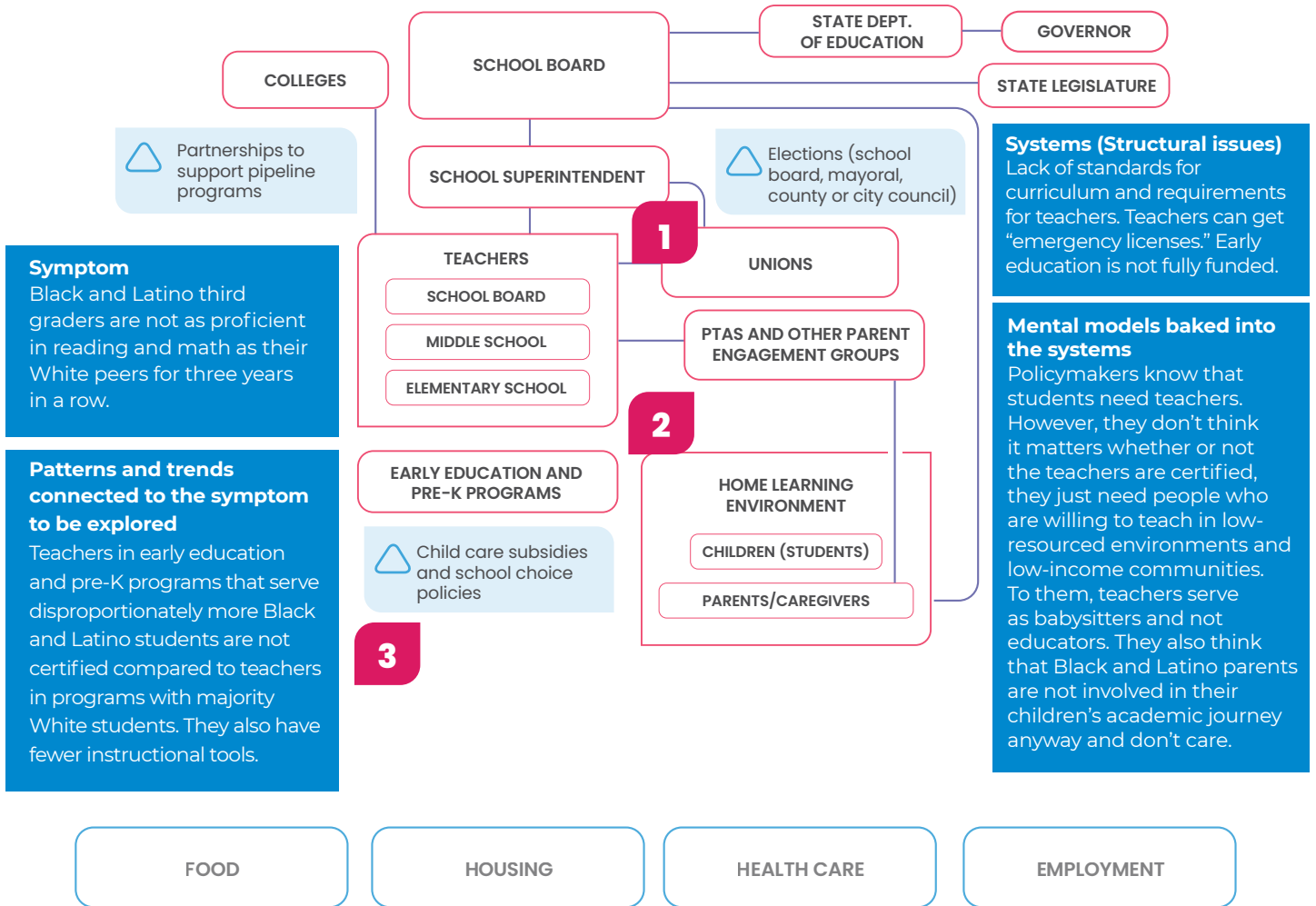
Understanding levers of systemic change helps you be better equipped to:

- Appropriately assess the effects intended by pushing the lever, from the immediate, direct outcome to longer-term, indirect outcomes.
- Help your client and other stakeholders step back and consider what happens when they push a lever.

Using the same illustration as Exhibit 3, Exhibit 4 overlays the levers that could be pushed and pulled to begin to address the disparities. Potential levers include:

- Black and Latino parent involvement in schools to increase schools' accountability to higher performance, resulting in an improvement in their children's reading and math proficiency.
- Establishment of a coalition of parents, advocates, community leaders and school administrators to advocate for standardized, age-appropriate curriculum and assessments.
- Black and Latino parents organizing to run candidates for the school board.

Exhibit 4: Potential levers of change



As a practitioner of evaluation in service of racial equity, addressing implicit biases and applying a systems lens is only a part of the experience. The other part is navigating some typical decisions (or “choice points”) that come up when conducting an evaluation in service of racial equity. The next section explores how to do just that.

Possible power plays

The most basic form of power is people’s ability to get what they want. When you begin to apply a systems lens to help the funder, partners and other stakeholders sharpen their theory and strategy and identify levers of change, power can come up in the following ways:

- The funder, partners and other stakeholders are part of the system that needs to be changed. Depending on their self-interests and agendas (especially if hidden), they can use their power to facilitate or resist the change—sometimes intentionally and sometimes not.
- Individuals in the communities that are supposed to benefit from the initiative have competing priorities, agendas and self-interests. Similar to the above individuals, they too can use their power to facilitate or resist the change—sometimes intentionally and sometimes not.
- The same situation applies to political leaders and appointees, especially during election years.
- In all the above situations, differences based on race, gender, position and rank and economic status can contribute to the amount and type of power they have.

Unless you are trained to deal with the conflicts that arise from power differences, you should strongly encourage the funder, partners and other stakeholders to seek assistance to address emerging tensions and conflicts due to power differences. You could help explain potential compromises and consequences if efforts to address the issues are delayed. (See the resources at the end of this guide for more.)

Section 4:

Choice points and decisions we will likely encounter

There are choice points we will likely encounter and decisions we have to be intentional about beyond the basics when implementing an evaluation in service of racial equity. There is no right answer. None of these are perfect situations. We have to make the best decision we can based on what we know—understanding that some of them have good results or serious consequences. These include:



- Considering whether or not to pursue an opportunity that might or might not be explicit about racial equity.
- Developing a theory of change, logic model and measurement framework that amplify racial equity, even though the conversations can be difficult.
- Implementing evaluation activities in a way that supports racial equity even if it means more time and resources. Leveraging findings to support continuous learning and strategy improvement because there is no easy path toward racial equity, and challenge the notion that this practice reduces the evaluation's objectivity.

Consideration about whether or not to pursue an opportunity

A potential funder, partner or other stakeholder may not appear to understand or be fully committed to racial equity. Ask yourself: In that situation, would you become their evaluator and seize the opportunity to raise their consciousness or would you decline the opportunity?

If you choose to pursue it, you want to be intentional about:

- Assessing the amount of your time, resources, effort, risks and emotional energy it will require and the return on your investment.
- Considering the influence and power you might have (or not) in the situation, your own biases and the mental models with which you are operating (your own and those of others).
- Determining your own training, strengths and limitations to facilitate discussions to raise their consciousness, keeping in mind that if you are not prepared to manage these discussions, you risk doing more harm than good.
- Examining your own knowledge about racial equity in relation to the issues and communities that are a part of the evaluation.
- Reflecting on your own self-interest to pursue the opportunity (see page 7 for questions to ask yourself).

Certainly, the choice is yours. You can choose not to engage with funders, partners and stakeholders who are not as diverse, inclusive, committed or knowledgeable about racial equity as you'd like them to be. Also remember that whether or not the experience is a positive one is not only up to you. Funders very rarely allocate sufficient funding for the steps, processes and other activities necessary to design and implement an evaluation in service of racial equity. If we apply a systems lens to this situation, we can see that the spread of evaluations in service of racial equity requires changes in an ecosystem that consists of philanthropy, professional evaluation associations, training programs and education curricula and the consulting industry. (The resources section at the end of this guide includes links to some organizations addressing this matter.)

This can be frustrating and exhausting work. If you choose to take it on, be sure to find a network of trusted peers who can support, challenge and celebrate with you along the way.

Development of a theory of change, logic model and measurement framework that amplify racial equity

W.K. Kellogg Foundation's Step-by-Step Guide to Evaluation contains a detailed explanation about how to develop a theory of change, logic model (visual illustration of the theory of change) and measurement framework. The basics for developing these evaluation products are the same no matter what you are evaluating. However, if you are developing them in service of racial equity, the conversations can be difficult. You have to keep in mind the following:

- Make sure your client, partners and other stakeholders define and agree on key terms, no matter how much they might want to resist or rush the conversations. Here is a general description of equity that you can tailor to the initiative and strategy:

Equity means that everyone, especially people from historically marginalized and disadvantaged communities, **has fair access to resources and opportunities and the ability to take advantage of the resources and opportunities.**

- What is meant by unfair and resources and opportunities?
 - » Discrimination experienced by people of a particular race at their point of contact with someone from an organization or system.
 - » Lack of affordable, healthy and fresh food.
 - » Lack of affordable and safe housing.
 - » Policies that allow for distribution of funding to already resource-rich neighborhoods.
- What is meant by ability to take advantage?
 - » Knowledge of rights.
 - » Skills to navigate complex systems of care.
 - » Skills and language to participate in election procedures and processes.
 - » Development of social networks to be able to leverage influence.

- Use a **systems lens** to guide the development of the theory of change and target levers of change. Be both persistent and patient in helping people apply this lens because systems thinking may be new to them.
- Name the specific racial population that will experience more equity as a result of the initiative and strategy (e.g., Black youth between ages 12 and 18 years, undocumented immigrants from Mexico and Central and South America, low-income Vietnamese families). Don't just use general labels such as "people of color," "low-income communities," "immigrants" or "historically marginalized groups" alone because:
 - Their use allows the funder, partners and other decision-makers to talk in generalities and create broad-based strategies that don't account for unique histories, contexts and experiences (Edwards & McKinney, 2020; Powell, 2012).
 - Communities are not homogenous. There are communities nested within communities based on shared histories, identities, lived experiences and geographic boundaries.
 - Quantitative outcomes are frequently averaged, which can potentially mask differences between "worst-off" and "better-off" groups, which could be valuable information (Mayne, 2014).
- Take time to understand how other demographic attributes, such as gender, income, sexual orientation, immigration status and disability can compound racial disparities. People have multiple identities that intersect and create different forms of exclusion (Dill & Zambrana, 2009). We call this intersectionality. Nevertheless, leading with race and racialized outcomes is essential because people's skin color is the most salient characteristic that has shaped stereotypes, assumptions and narratives in the United States, because of the meanings attached to skin color in the U.S. (and globally). Disaggregated data by race and all these other attributes also allows for other forms of inequity to become apparent.
- Be intentional about considering potential unintended consequences (or benefits) for populations other than the one of interest. See if you can lessen the likelihood of unintended consequences.

Racial equity is both a process and an outcome. It is an outcome when disparities due to race and ethnicity are eliminated because people who have been historically marginalized on the basis of their race and ethnicity and where they live now have fair and just access to opportunities and resources and the ability to take advantage of the opportunities and resources. It is a process when people from these communities are no longer treated with condescension as subjects and are authentically and meaningfully engaged as decision-makers in framing the problems and designing the solutions that affect their lives (Center for Social Inclusion, n.d.).

Consider this

The funder, partners and stakeholders want an equitable evaluation approach, but they are not clear on where and how racial equity fits into their theory of change and strategy. If this is the case, your ability to conduct an evaluation in service of racial equity is limited. Before you can design and implement such an evaluation, you first have to help the group:

- Understand racial equity.
- Build in racial equity into their theory of change and strategy.
- Manage their expectations of the evaluation.

Expectations are important as evaluation is not magically going to help advance racial equity simply because they required an equitable evaluation approach. Sometimes, you have a funder who insists on racial equity outcomes that are not realistic in a certain timeframe. You want to work with other partners (e.g., technical assistance provider, intermediary that manages the initiative) to communicate clearly and consistently that these outcomes will not only be unfeasible, but that this expectation actually sets organizations and communities up to fail. In such a situation, you and other partners can help educate the funder about the conditions for racial equity outcomes and how they will be systematically documented as part of the evaluation. You can also suggest that the funder speaks to peers about their experiences. In the event that you don't have other partners to lean on, you still have the same message and can facilitate discussions with the funder about any incremental progress toward racial equity as well as events and conditions that might have impeded progress.



Implementation of evaluation activities in support of racial equity

Issues, challenges and concerns—from poor participation to disagreements between you and other participants—inevitably arise during the day-to-day implementation of any evaluation and its activities. However, in evaluations in service of equity, it is essential to examine these issues, challenges and concerns to make sure that the evaluation itself is not perpetuating biases, supporting the status quo and/or doing harm to communities of color. In other words, you have to be mindful of the power dynamics and manage them. Admittedly, this can be hard for you, the evaluator, because it could mean disagreeing with the people you work with, potentially hurting relationships, and in the extreme case, even terminating a contract. It also means you have to put in more time and resources to address some of the unanticipated, complex situations that come with racial equity work. Here are some common scenarios and considerations for how you might handle them.



Managing turnover in staff and community leadership because people working toward racial equity can become burned out and frustrated

We often treat such turnover as just another event in our data collection. However, in evaluations in service of equity, this sort of turnover isn't just another event. It is a symptom of organizational policies, practices and community norms that don't treat activists and social change agents as whole people. Organizations involved may also not have clear expectations and procedures about staff or volunteer job performance, professional development and succession planning. Consequently, dysfunctional relationships and environments can begin to take root and the symptoms can become conflated with racial prejudice and racism. As an evaluator, it is up to you to understand the root causes of the turnover and to include the context surrounding organizational readiness and capacity to address racial inequity in your evaluation study to the best of your ability, without violating confidentiality.

Consider this

As the evaluator, you could help make funders and executive directors of organizations involved in the work become aware that issues such as organizational dysfunction and the risks that people of color take when they confront powerful people and institutions can have serious consequences for people of color and their communities. Some organizational leaders may not have thought about this or be at a loss about what to do. They may brush it off because you are not perceived as an organizational development expert and staff dynamics was not in the evaluation design. Focus on the desired outcomes—in other words, you need to provide supporting information about instances when the lack of response to these issues have delayed or averted the desired outcomes or created harm, and suggest resources to help the leadership come up with solutions. These resources could include human resource professionals, expert facilitators and organizational change consultants.



Collecting and reporting data on strategies could expose people who are organizing for change to harm

Community leaders of color may likely encounter resistance in their efforts to call out and fight for racial equity and to organize against those with power in their communities. Imagine, if in the middle of your evaluation, a newspaper article describes their tactics as disruptive and some of the leaders start to feel unsafe. The leaders might begin to question the evaluation and be reluctant to share any more information about their strategy and activities for fear of sabotage and for their safety.

Consider this

You should bring up the possibility of the above situation with funders, community leaders and other partners from the outset of the evaluation. Don't wait until the situation occurs and then deal with it. You might ask everyone to consider options for reporting and disseminating the findings. For instance, findings can be reported verbally and not formally in writing. Finally, you can and should request that the funder and partners work with the community leaders to determine if they need assistance with responding to the media.

Shedding light on difficult situations

The community partners, who represent different racial and ethnic groups, may not always cooperate with each other and consequently, activities may stall. Picture the funder getting increasingly frustrated to the point of expressing regret about investing in the collaboration. While it is not in your scope of work to investigate, you have a responsibility to help everyone understand what is going on because if the funder decides not to invest in the communities' cross-racial collaboration in the future, the communities' access to resources and opportunities could be greatly reduced. You would want to use a systems lens—investigate the historical and cultural forces that could affect the partners' perceptions about each other (e.g., one racial group has historically dominated the construction industry and was hesitant about giving access to another racial group for fear of reducing the availability of jobs for their members)—before assuming interpersonal differences are the cause. This could help the funder and the partners understand the underlying structures at play and have the opportunity, through additional support if necessary, to transform their conflict into empathy.

Consider this

Taking the initiative to surface racial tensions and conflicts requires courage and perseverance to see it through. It means also that you could become the central force or “hub” of grievances and other emotional outbursts. You may even be perceived as taking sides because of your race or ethnicity, or as having power because of your association with the funder. You have to be mindful of this and have the skills to disrupt this perception. You have to be ready to be part of the solution as well. You want to consult with an expert facilitator experienced in dealing with disagreements, tensions and conflicts about how to handle the situation, if you don't have the skills yourself. You also want to follow up with the funder to ensure proper assistance was provided to the community partners.

Responding to external shocks

Community and larger events that signal racial biases and inequity could occur in the middle of the project and affect the evaluation by diverting, disrupting or changing its course entirely. For example, in early the 2000s, in the middle of an immigrant integration initiative, anti-immigrant sentiment grew and raids to round up undocumented immigrants became more frequent. Consequently, immigrants were fearful about attending program activities and grantees were unable to achieve their outcomes. In 2020, many initiatives had to pause their efforts because of the coronavirus pandemic. Community organizers, residents and advocates had to redirect their efforts to respond to the urgent and immediate needs of low-income and vulnerable residents.

Consider this

Instead of simply reacting to the immediate issue, you could proactively help the funder, partners and other stakeholders understand what external events could impact the initiative using examples of history (e.g., policies that affect immigration and refugee resettlement, public health crises like the COVID-19 pandemic, disasters such as hurricanes) and what capacities communities need to build in the short and long term to be able to respond to the events. A systems lens can help you do this, especially because these events have frequently exacerbated the disparities already experienced by communities of color. You could use the evaluation to bring attention to issues that obstruct progress toward racial equity and facilitate discussions to identify levers of changes and help the initiative and the evaluation pivot. In such situations, the evaluation can become part of the intervention. Keep in mind that not everyone is comfortable with this. Help them understand the opportunity and not be derailed by debates about objectivity.

The issues, challenges and concerns described in this section all have implications on the evaluation's timeline and budget. The amount of money funders set aside for evaluations that are in service of equity is almost never enough to deal with the above situations. Yet you are committed to using evaluation to help advance racial equity. Consider how much of the scope will be within and outside of your control, and how much time and effort above and beyond the contract hours and amount you are willing to invest for a purpose that will be larger than you and your organization. Finally, consider the support you need to be able to challenge myths about evaluation and the evaluator's role and to take risks that could affect your job and career.

Choice points and decisions: A story for your reflection

This story is based on Community Science's experience, but we changed some of the information to prevent any association to the actual groups and situation.

We facilitated the development of a logic model for a multi-racial community coalition, whose goal was to ensure proper flow of job training resources from the state government to local jurisdictions (e.g., availability of translation and interpretation assistance, engagement of community leaders) and equitable distribution of the resources to the two major racial groups in the community: Hmong and Black people. The leadership for the coalition's backbone organization was primarily White and the Hmong and Black communities were represented by three and two organizations, respectively. By the second meeting, it became clear to us that while all the participating organizations agreed on the coalition's overall goals, one of the Hmong leaders repeatedly disagreed on the indicators of success, which meant we had to pause the process and work through the disagreement. In the meantime, the backbone organization's leadership was feeling anxious because they were already behind in submitting an evaluation plan to the funder. Conversations between their executive director and us centered on interpersonal conflicts (including speculations about cultural, gender and generational differences) and everyone was impatient to move on.

However, the underlying tension that was showing up as disagreement around indicators and "interpersonal" conflict required the time to examine what was really going on. We applied a systems lens and raised the following questions with all the participants:

- The outcome and therefore, the indicator, pointed to an increase in the Black community's share in the industry typically dominated by Hmong workers. Did this outcome mean less economic security for the Hmong community if more Black people became eligible for jobs in the industry?
- Are the two communities competing for a set of limited jobs – jobs that don't require a degree or a lot of training? How does this type of labor segmentation perpetuate racial inequity?
- The Black leaders were in favor of advocating for a language justice policy, recognizing that the Hmong community often had limited access to opportunities and resources because of the state's lack of translation and interpretation assistance. They were clear that the ultimate goal of holding the state accountable could benefit all the racial groups in the city. How did the Hmong leaders think their participation could benefit all the racial groups and in particular, their Black partners at the table?
- Have the leaders representing the racial groups in the city engaged their own communities in discussions about the coalition's goals? Did they have a strategy to bridge their community members through their respective constituencies?

Exploring these questions started to unearth the mental models that were operating at the leadership and community levels and other systems that needed to be considered beyond the economic system. The logic modeling process provided us, as the evaluator, the opportunity to help the coalition place its work within the larger context of racial equity. At the same time, we recognized that our role was quickly becoming blurred between evaluators and facilitators. Also, they needed more intensive in-person facilitation than we could provide. We consulted with the backbone organization about engaging their funder to request expert facilitation and technical assistance. We identified a couple of expert facilitators who lived in close proximity to the city as well. We spoke to the funder ourselves—with permission from the coalition members—and explained the situation. We learned later that the funder didn't follow up.

If you encountered such a situation:

- What would your response have been, as an evaluator practicing evaluation in service of racial equity? Why?
- Where do you think your responsibility begins and ends, if there is a beginning and an end? How would you have balanced what you knew and didn't know then, and what you were hired to do and not do?
- What would you have done, if anything, to ensure that the funder followed up?
- What other questions might you have asked? Why?



Continuous learning and strategy improvement

Our efforts to achieve racial equity are ongoing and every step forward, big or small, offers a learning opportunity. For this reason, a continuous learning and strategy improvement process is critical in evaluations in service of racial equity. The process must begin the moment you help a funder develop their theory of change and strategy and continue until you complete the evaluation and help them reflect on the findings. Continuous learning and strategy improvement operate in parallel with all the other stages of evaluation (see Exhibit 5). The basics are the same, but the questions you ask are different and explicitly related to issues that come up in racial equity work.

Peel away the layers of the onion during planning

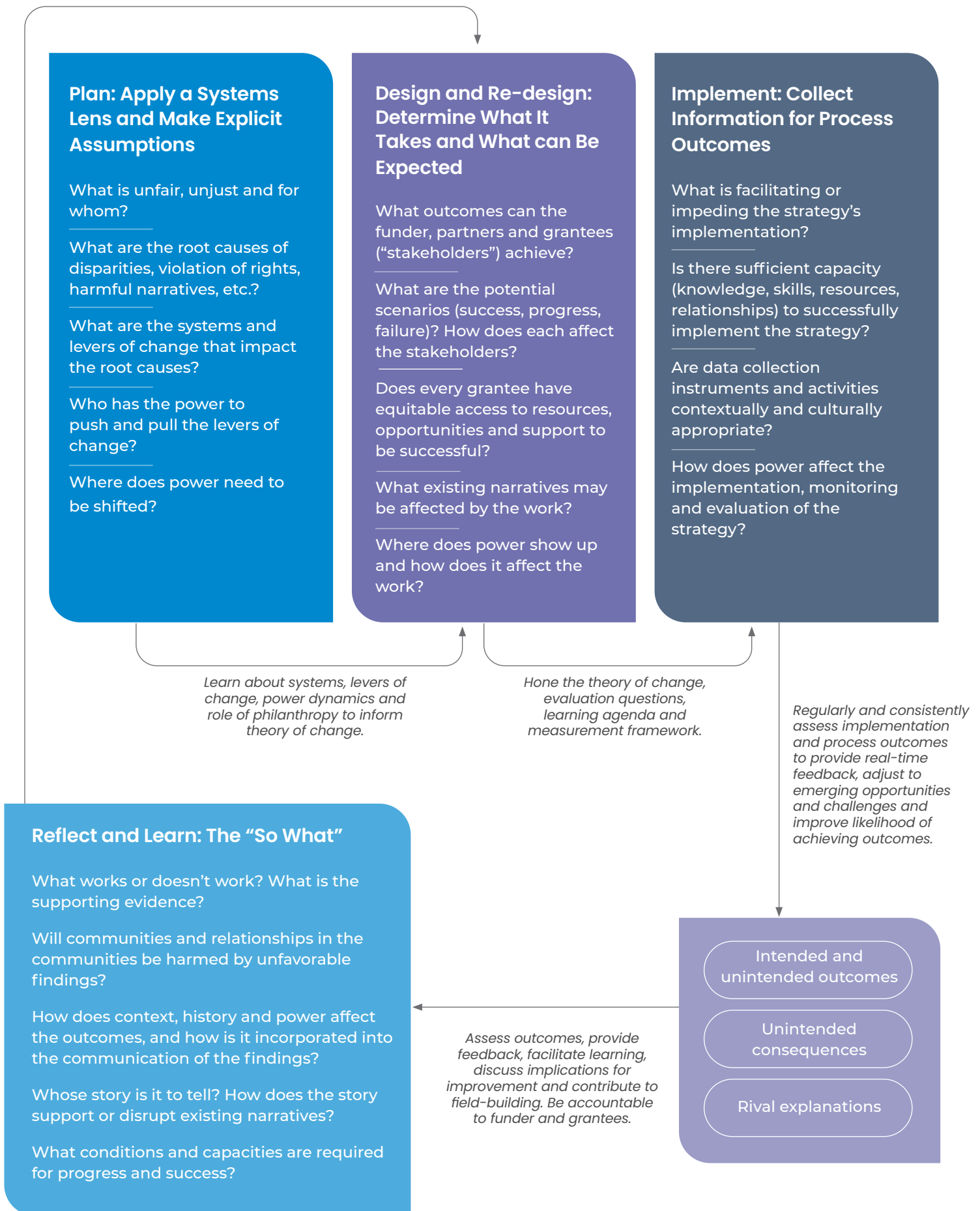
The questions asked in the first stage—planning—involve the use of a systemic lens to inform the theory of change and strategy. This stage itself is iterative as you work with those involved to understand:

- Which specific groups of people are affected by the racial inequity.
- Where in the system the problems are.
- Which levers to trigger to effect change.
- Where the power lies that needs to be shifted.

Learning is happening at this stage as you, the funder, partners and other stakeholders deepen your understanding of the situation and sharpen the framing of the problem.

Sometimes, you enter the process after the funder, partners and other stakeholders have decided the problem and are in the design stage. In this case, you can further explore the problem during the next iteration of the strategy improvement process.

Exhibit 5: Continuous learning and strategy improvement process in service of racial equity



Align goals, strategy, outcomes and capacity during the design stage

The design stage is typically where you help articulate the theory of change, illustrate it in a logic model and then develop the measurement framework and evaluation plan. What is different in an evaluation conducted in service of racial equity are the kinds of questions you raise, like these:

- Who is supposed to benefit from the initiative so the strategy is sufficiently customized to this population?
- What are the risks and benefits for the benefitting population? Could the initiative lead to unintended outcomes that might benefit the population in other ways or benefit another population? Could the initiative inadvertently harm the population in other ways or harm another population?
- How might the initiative influence existing narratives about the people who are supposed to benefit?
- What capacity-building support (e.g., training, coaching, technical assistance) and resources are needed by the people implementing the initiative and the communities who are supposed to benefit so everyone has what they need to be successful?
- Where and how can individuals with power help facilitate the work or impede progress?



Use the data collected to explicitly explore where racial inequity lies

The data collected, analyzed and summarized should be intentional about exploring:

- Unequal distribution of resources and support to the communities that were supposed to benefit.
- Use of power (and by who) to facilitate or impede progress.
- Community, organizational, historical and other events that could have affected the implementation and outcomes.
- Ways to reach deeper into communities to hear the perspectives of the people who were supposed to benefit from the initiative.
- Any unintended consequences that could hurt progress for one racial group even as the initiative benefits or another racial group.

Discuss, reflect and improve

This is undoubtedly the most important part of conducting evaluation in service of racial equity. It requires effective facilitation because the discussion and reflection need to deliberately provide feedback about:

- Prominent and relevant tensions that might exist in the strategy and its implementation due to power differences among the funder, partners and grantees, and whether or not race, gender and other forms of identity affected the dynamics.
- Capacities that need to be further developed, who by and for, to ensure that everyone—especially grassroots, people-of-color-led organizations—can take advantage of the resources and opportunities available to them.
- Areas that need further attention and solutions to overcome barriers that stand in the way of progress toward racial equity.
- Parts of the initiative and mental models about the theory that might need to be let go because they were inaccurate about what communities of color need in order to have equitable access to resources and opportunities and build power.

A story for your reflection

This story is based on Community Science's experience, but we changed some of the information to prevent any association to the actual groups and situation.

We evaluated an 18-month initiative that supported community organizations to apply a racial equity lens to their health promotion efforts. We met with the funder's president and staff several times to discuss the following:

- **Their expectations of change by the end of 18 months, knowing full well that it takes many years before any racial equity-related outcomes become apparent.** We asked this question multiple times and separately with the president and the staff to ensure their answers were consistent and their expectations were realistic. We knew from experience that sometimes leadership has more lofty expectations while staff tend to be more grounded in reality. In this example, they were on the same page. If they weren't, we would have had to point this out and help them arrive at a set of common and realistic expectations.
- **Outcomes that were acceptable and not acceptable to the funder.** We tested different scenarios of outcomes with the funder, from the community organizations' increased capacity to use a racial equity lens to procedural and policy changes in the organizations, to get their reactions to what was acceptable success, progress and failure.

In the middle of the initiative, we learned that the organizations struggled to apply a racial equity lens. For instance, they discussed how they could expand their health care services to different racial and ethnic populations, or how they needed a better system to connect people to jobs, affordable housing and other services. They didn't know how to analyze and dismantle the policies, procedures and practices that prevented people from equitable access to resources and to shift the power in the communities they worked in. This evaluation finding implied that the funder needed to invest in more capacity-building support to help the organizations connect the dots between health, racial equity and systems change. The funder increased the support only slightly. To assist the community organizations (and outside our scope of work), we conducted a webinar to help them apply a racial equity lens by teaching them how to analyze and interpret data on racial and ethnic health disparities, frame questions, identify where unequal treatment and inequitable access might exist in the health, health care and other systems and determine strategies and the types of outcomes they could expect in 18 months and beyond.

If you encountered such a situation:

- What would your response have been, as an evaluator practicing evaluation in service of racial equity? Why?
- Where do you think your responsibility begins and ends, if there is a beginning and an end? How would you have balanced what you knew and didn't know then, and what you were hired to do and not do?
- What would you have done, if anything, to encourage the funder to invest more heavily in capacity-building?

Conclusion

As evaluators, we often focus on racial prejudice and implicit biases between individuals as part of our effort to use evaluation as a tool in our struggle for racial equity. We also have to work on ourselves and our own implicit biases. This guide was intended to take it one step further—to connect ourselves to the larger movement for racial equity which requires us to:

- Become mindful about how our implicit biases naturally shape our framing of evaluation questions, our trust of different types of data sources and the evidence they produce, and our inclination to support strategies and initiatives that are consistent with our beliefs, viewpoints, approaches and interests.
- Use a systems lens to understand and amplify the structures, relationships, mental models and narratives that contribute to recurring patterns and trends of disparate outcomes in health, education, housing and other conditions in communities of color.
- Use this lens to also identify the levers of change to disrupt the structures, relationships and mindsets.

It means we have to see ourselves as change agents and perform the above behaviors until they become intuitive in our practice of evaluation. It will not be easy and it will not happen quickly. We have to situate ourselves, based on who we are by race, gender, sexual orientation, religion, ability and other self-defined characteristics, as well as by our positions in our organizations and in the evaluation profession. Often, we have to fight how others define us, professionally and personally. Also, none of the above occurs in a vacuum. Evaluations and evaluators are part of an ecosystem of philanthropic organizations, academic institutions, scientist establishments, tribal nations, public agencies, professional associations and the consulting industry—all of which have to do business differently if we are going to use evaluation practice to make progress toward racial equity. To reiterate what was said in the beginning of this guide, we have to be courageous, curious and empowered to challenge the conversation about racial equity in evaluation, and to continuously practice evaluation in a way that will help advance racial equity, learn from the experience and improve.

Exercises

Check yourself and your team

- If you are an independent consultant, find a peer or two to process your thinking.
- If you are part of an evaluation team, develop a process and cultivate a brave space for asking questions about each other's potential blind spots and monitoring how they could influence the evaluation design, process and products.
- You can also develop an agreement with your client and other partners to create a non-judgmental space to check each other.

There are many tips about how to create a brave space for challenging each other's assumptions and biases. (See the resources at the end of this guide for more.)

Question bias: framing of evaluation questions and problem

- Which dominant narratives am I more likely to buy into without questioning?
- Can the lack of performance or poor performance of a particular person or group be attributed to their cultural traditions or values? What evidence supports this?
- Why wouldn't people of a certain race, ethnicity or cultural background have high aspirations for their communities, families and children?
- Am I using terms in my questions or problem statement that have negative connotations about a particular group of people?

Data bias: data, evidence and methodology

- Am I inclined to consider only evidence published in peer-reviewed journals? Whose published works am I paying more attention to and why?
- Am I going out of my way to read literature that presents a different viewpoint from my own?
- Is the evidence based on sound analysis, including disaggregation of data by race, gender, income and other intersecting demographic variables?
- Why do I believe that this evaluation methodology is better-suited for the initiative and not any other methodology?
- Am I intentionally paying attention to where and how the methodology or approach might not be appropriate, or is it a blind spot? If so, how do I put checks and balances in place?

Personal belief bias: self-interest and personal agenda

- What is appealing and not appealing about the strategy I am evaluating? Why?
- Do I want a strategy to succeed so badly that I misdiagnose or diminish the challenges at the risk of compromising the longer-term goal to end racial inequity?
- How does my own racial, ethnic and cultural background influence my interests?
- What happens if I don't side with popular views? Is there a personal or professional risk?
- How much power do I have in the situation and how much of that power am I trying to hold on to and why?

Exercises

Explore your preconceived notions

Here are some examples of information based on data that show different trends. Review them and explore your preconceived notions about what information or evidence you tend to believe.

- A 2017 study by the Federation for American Immigration Reform showed how undocumented immigrants received more than \$100 billion a year in taxpayer benefits, including prenatal and postpartum care under the Special Supplemental Nutrition Program for Women, Infants, and Children (WIC) program. Also, 31% of immigrant families with U.S.-born children use the Supplemental Nutrition Assistance Program (SNAP) (La Jeunesse, 2019).
- The IRS reported that in 2015, \$4.35 million tax returns were filed using Individual Tax Identification Numbers used primarily by undocumented immigrants who don't have Social Security Numbers (Shoichet, 2019). Undocumented immigrants' draw to sanctuary cities and immigrant-friendly cities is all about finding work, not using benefits, according to immigrant advocates.
- Descriptive statistics published by American Renaissance in 2019 showed that African Americans and Latinos received more assistance from the Temporary Assistance for Needy Families (TANF) program than Whites, Asians and Native Americans (Bradley, 2019).
- Evidence compiled by the Center on Budget and Policy Priorities showed that in 2014, White working-class adults without college degree made up the largest group of people lifted from poverty by safety-net programs, while poverty rates among people without college degrees were substantially higher for Blacks and Hispanics (Shapiro et al., 2017).
- A study published in Academy of Management Learning and Education, using data from 1964 to 2007, concluded that the effectiveness of diversity training is inconclusive. Nevertheless, corporations continue to believe that such training is essential to their businesses' success (Anand & Winters, 2008).
- An experiment by a team of researchers from The Wharton School of the University of Pennsylvania in 2017 found that diversity training does not generally result in any behavioral or policy change in work environments (Chang et al., 2019).

Exercises

Check your systems lens

Keep a list of questions to ask yourself.

This list should be a living document. You can add new questions, modify them, delete some of them and so on, as you become better and better at understanding systems and checking your own biases. Here are some questions to get you started.

Questions: identifying systems

- What important forces (e.g., people, norms, events, laws, etc.) impact how the system or systems work—both positively and negatively?
- Are there national, state, and local laws, policies, strategic plans, or plans of action that are related to the issue of concern? What might have compelled the construction of the laws, policies, and plans? Who wrote them?
- What are the upstream causes and downstream effects of these forces?
- Who is responsible for enforcing or implementing the laws, policies, or plans at the federal, state and local level? Is there a coordinating agency?
- What are the community-based organizations that engage with and represent the interests of the people most impacted by the laws, policies or plans?
- What programs exist to support the laws, policies or plans?
- How are the laws, policies, or plans monitored, regulated and evaluated and who is responsible?

Questions: applying a systems lens to your evaluation

- Does your client have a role in maintaining or changing the mental models and systems that contribute to the racial disparities of interest? What is that role?
- How do you, as a practitioner of evaluation in service or racial equity, assist the client to consistently make decisions that are also in service of racial equity?
- Do you need help facilitating discussions with the client about the systems change they want to effect as well as racial equity? Evaluators typically don't receive training in group facilitation and you may still be developing your knowledge of racial equity so it is okay, and may even be more appropriate, to hire a facilitator with expertise in this area.
- Have you sufficiently disaggregated the existing data relevant to the disparity of concern by race and ethnicity, as well as by other demographic variables such as gender, income, age, education, and location (if it's a place-based initiative) to fully understand the situation and how systems intersect to impact the population of interest?
- How can you learn about the disparities from the communities experiencing them?
If you are not a member of said community, do you need to build trust first?
- As you apply a systems lens, are you paying attention to the implicit biases you might be maintaining?

Resources

Implicit bias and creating brave spaces

Color Brave Space: How to run a better equity focused meeting.

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Equitable Evaluation Initiative www.equitableeval.org

Center for Evaluation Innovation www.evaluationinnovation.org

National Network of Consultants to Grantmakers. *The Diversity, Equity, and Inclusion Toolkit for Consultants to Grantmakers* www.nncg.org/resources/dei-toolkit

Systems thinking

Change Elemental. (2020). *Systems Change & Deep Equity: Pathways toward Sustainable Impact, Beyond "Eureka!," Unawareness & Unwitting Harm.*

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Williams, B. & Hummelbrunner, R. (2009). *Systems Concepts in Action: A Practitioner's Toolkit.* Stanford University Press.

Power and conflict transformation

Dukes, F., Piscalish, M. & Stephens. J. (2000). *Reaching for Higher Ground in Conflict Resolution: Tools for Powerful Groups and Communities.* Jossey-Bass.

Hunjan, R. & Pettit, J. (2011). *Power – A Practical Guide for Facilitating Social Change.* Carnegie UK Trust.

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