

Strengthening Capacity for Equity in New England Evaluation (SCENE) Collaborative

SCENE Event 3: Co-creating Contractual & Organizational Support

Prepared for: Event attendees and SCENE collab members

Transcript: Reviewed by Kayla Benitez Alvarez

Note: This is for professional learning purposes – please do not distribute, edit or alter or quote speakers outside of the context of this panel.

Questions: Contact Emily Gates (gatesea@bc.edu)

INTRODUCTIONS: SCENE TEAM

Emily Gates: [00:00:00] I'm Emily Gates. I'm an assistant professor at Boston College, one of the co-leads of the Scene Collaborative, which stands for Strengthening Capacity for Equity in Evaluation in New England. So just a little bit of background, there was a research study over the last year and a half, and this came out of that research study because there was a lot of express need to get to know other evaluators in the region and create more space for thinking really deeply about what equity looks like in our practice, and then for working together and how we can change some of the structures that hinder us to actually create more space for more equitable work. So that is what we're here for. Our website is there and you get that whenever you get our email updates as well. If someone on our team can drop the slide deck in the chat, the slides will be available and we'll drop that link a couple of times in the chat as well. It's an open Google slide deck. And my other housekeeping, I almost forgot was that we do have closed captioning on the line. So if you click closed captioning on the bottom row of your Zoom, that will enable that and then you can see the text for our speech. So this is our agenda. We started a couple of minutes late, but we'll keep going. Welcome. Then we'll have the panel for almost an hour up until right about 4:00. Then we'll have a short bio break. And at that time, we're going to set up some breakout groups. So if you can stay for the second hour, we'll have some small group discussions reflecting on some of the questions that came up during the panel. And then we're going to talk a little bit about social systems mapping, an initiative we'll launch next week so that we can start to identify who's out here and get connected that way. And then we always run a raffle. So if you haven't been to one of our events before, there's a book raffle. So just showing up and being here registering, you get a chance to pick a book of your choice and we'll

have, I think, 20 winners or so that Joe will announce toward the end. Let's just say a quick hello. You're going to meet Min and Andres, so I'll have the other members say hello. Trish, if you would say hi.

Trish Dao Tran: [00:02:21] Hi everyone. Nice to be here with you all. I'm Trish Dao Tran, membership co-chair with the Greater Boston Evaluation Network.

Joe Madres: [00:02:33] Hey, everyone, I'm Joe Madres. I'm a Ph.D. student at Boston College coordinating the SCENE collaborative and part of the SCENE study that it was based on. Nice to meet everybody.

Emily Gates: [00:02:44] Lisa Goodman is a professor in the counseling department at Boston College. She's not with us today, but she's part of the team. And then Maya.

Maya Komakhidze: [00:02:53] Hi. I'm a Ph.D. student at Boston College also and involved in the collaborative.

Kayla Benitez Alvarez: [00:03:01] I'm Kayla. I'm an undergraduate senior B.C. And I've also been helping out with the SCENE collaborative.

Emily Gates: [00:03:07] There are a lot of us behind the scenes putting these events and we are in partnership with the Greater Boston Evaluation Network. As Trish said, we've got funding from the Bar Foundation who are supporting this, and also funding from an institute at Boston College. So if someone would pop the link, we have our first publication from the scene study, which is open access, and it uses interview data to look at some of the ecosystem level factors that help or hinder our ability to center equity in evaluations. And this is a visual of the factors. So we organize some of the themes from the interviews using ecological model. And really what we're talking about today are some of the biggest factors that people experience as hindrances. So within organizations, within our relationships with funders, and within contracts, those were the biggest things that people said that's why I can't do more equitable work. So we're here to dive in and talk about some of those factors together and how we can address them. Quick plug, there were resources that have been recommended to us. If there are others you know about, drop them in the chat. There's a lot coming out on this topic.

These are all on the website, so they are there for your perusing. Thanks. With that, I'll turn it over to Andres to kick off the panel.

PANEL INTRODUCTION & Q: IDEAL RELATIONSHIP BETWEEN FUNDERS & EVALUATORS

Andres Castro Samayoa: [00:04:32] Hi, everyone. My name is Andres Castro Samayoa and I'm an assistant professor at Boston College in the Department of Educational Leadership and Higher Education. I'm going to stop doing a shared screen right now so that folks can see each other a little bit better. And my invitation will be for those of you who are in the audience to turn off your video so that then our panelists can come to the foreground and be the first squares that everyone is able to see. So as we're doing that, I'll just quickly start introducing our panel as well. We're going to be hearing from all of them for the next hour. We have a few questions that are really trying to get at the heart of today's conversation, which is how is it that we can imagine co-creating contractual and organizational support for equity in the context of relationship building between commissioners and evaluators? We're joined today by Drew Koleros, who is a senior researcher at Mathematica. Drew, if you want to wave and say hello. Dr. Monique Liston, who's a chief strategist and joyful militant at Ubuntu, Min Ma who's the founder and principal at MXM Research Group. Rory Neuner, who's the learning officer at the Barr Foundation, and Robert Torres with the Boston Region and director of Community Benefits at Beth Israel. So in advance of today's gathering, I had reached out to all of our panelists with a few questions. **The first one, which was sort of helping us to get things started on a pretty broad level, just imagining how is it that we get to envision the ideal relationship between funders and evaluators, and how is it that each of these groups can actually try to strive and cultivate that relationship?** So Rory, why don't we get started with you?

Rory Neuner: [00:06:15] Thank you and good afternoon, everyone. It's exciting to be part of this conversation. So I would just say I work for a foundation, a funder, the Barr Foundation, based in Boston, where I've been for about the last year and a half. But some of the comments that I'll make today are also informed by both my own work as a former consultant, both as an individual consultant and evaluation consultant, as well as part of a larger firm. And prior to coming to Barr, I worked at another funder in Michigan, where some of the work I'll talk about today. I think the ideal relationship if we kind of go

first to the theoretical level is to think about that, you know, this ecosystem approach that's part of the wonderful recent article that Dr. Gates had had mentioned at the beginning of the session that we're all in this together. And whether it's foundations, nonprofits, or consultants we're all part of trying to figure out what's working in our work together. I think it also since we're talking contracts, how do we all work together to think outside of just the container of the contractual relationship? And think more about the fact that we're probably going to run into each other over time. If it goes well, we want to work together again. People change jobs. People have different roles over time. And so kind of thinking about that and taking a collective approach to things, I think that certainly, I'll just say requires a lot of work to build trust. And I'll say I'm still quite new to New England and new to the Boston region. And so part of why I'm so excited to talk to you all today is just to get to know some of you. As you know, at the Bar Foundation, we continue to try to build relationships with evaluators in a variety of positions to advance our own work. So, you know, trust is a really key and critical component to that. And the ability for consultants to be able to say things to us and at the funding side of the table that what's working, what's not, I think, is the ideal, even if there's certainly a power dynamic that will always be present.

Robert Torres: [00:08:38] Hello, everyone. Robert Torres here from Beth Israel Deaconess Medical Center. Nice to meet you all. And my experience is largely as a commissioner at a large health system that brought on several different evaluators for a process related to our determination of the need of a community-based health initiative. So a requirement when a hospital builds a new building, they must invest a significant amount of money into the communities it serves and are required to evaluate that process as well. And then prior to being at Beth Israel, I've been there about three years now, and I started right before COVID. I was at Urban Edge Housing Organization, and I was a grantee on many fronts. So I would constantly apply for funding and to fund the work that we do. And I constantly felt burdened by the evaluation requirements that often felt like it was taking from some of our other work. So some of my answers today come from that vein as well. And similar to Rory, I think really flexibility and trust are what's essential and the ideal relationship. I think in my role now, everything is so requirement based from a state-level that there's a lot of focus, at least from the health system, on what do we need to do to meet those requirements and to do that fully without being questioned. And so what I look for is an evaluator who will be flexible in that and also help manage up a bit as well. And just to recognize that, yes, those

requirements are important, but sometimes we have to push back, especially if we're putting too much burden on the grantee and creating some issues there, especially in the light of COVID, where we started and negotiated this contract even before I started or some of the contracts before I started. So I've had to deal with the cards that I've been dealt and had to really work to build relationships with the evaluators that I'm working with. And hopefully, they understand the constraints that I'm under as well as the aspirations that we have and try to manage those aspirations up and push against some of those requirements at times.

Min Ma: [00:10:55] Hi, everyone. It's great to be here with you all today in a different capacity than usual. I lead a small evaluation practice called MXM Research Group. We're currently a team of six. I'm bringing to this conversation the lens of being a small business owner and lead evaluator on a number of projects of different sizes. Previously, I was an independent consultant and subcontracted often, and I am also, in reflecting on my comments for today. I am also drawing from my experience having been a program officer for an international NGO and also as the President of GBEN, we've done a lot of thinking lately about what our role is in building an evaluation pipeline or pipeline of evaluators that really reflects the communities we're trying to serve. And so I'm drawing from a lot of these conversations that I'm having all the time. I want to echo the comments already about trust and how important a role that plays and just having conversation early on in the relationship to align on values, on the ways we're going to be working together, acknowledging those power dynamics and constraints that Robert's describing, trying to decide whose perspectives we're going to prioritize, and in defining the evaluation questions and the criteria and being transparent about what biases we bring, because everyone brings a bias and there's no way for any team to fully account for that. So just to be transparent about that.

Monique Liston: [00:12:47] Good afternoon, everyone. My name is Monique Liston. I'm the founder and chief strategist at Ubuntu research and evaluation. We are a relatively small evaluation firm with a very explicit focus on race. All of the employees and staff at Ubuntu identify as black, holding a lot of other intersectional identities along with it. And with that echoing what everyone else has said about the ideal relationship, one of the things that's important to us is you already sort of know what you're getting when you're entering in a conversation with Ubuntu, because we are Black, and we use race words and we aren't afraid of them. And so when we're thinking about the ideal relationship,

it's not to put ourselves in the position where we have to mute something that is very, very apparent about us so that we are thinking consciously and intentionally about how race shows up in our everyday lives and connected to that, echoing this idea of trust, I'm thinking about radical vulnerability and radical honesty and being in a position to actually be honest about the questions people have concerning the evaluation, context or frame, especially when we're in this time where everybody has questions about racial equity, but not enough people have the language that are prepared to engage with questions about race. And so it's like, we want to know what's happening about racial equity with X organization and X grantees strategy. And then I ask them like, Are you prepared to address how you show up as a white person in this space? And people are like, oh my gosh, did you just say I was white? I mean, you look white. Can we get ready to have a conversation about that? And if we're not prepared to have a conversation about that, it's going to be really difficult for us to have a meaningful conversation about your equity strategy and overall our evaluative thinking around it. So building that relationship around what does it mean to be radically honest? Like are you asking the actual questions that you want answered or are you asking the questions around those questions, hoping that we can play this back-and-forth tag about using coded language to figure out things as opposed to saying like, I'm really curious why the black folks don't want to use any of our resources? Say that because then that's a much more productive evaluative frame for us to enter into, other than for some reason we're not seeming to connect with the urban population in our area. And it's like, well, what does that mean? Who are you talking about? And that's not really the question you're wondering. And so, you know, I'm thinking about that trust being built by entering into conversations with radical honesty and radical vulnerability. I don't get this. I don't understand this. This race stuff is new to me. How do I approach this? That's a great place to start and a much better place to start than to assume. Like we're all comfortable with what's going on now. We all understand the same language. We don't. So let's just be honest about that and start from there.

Drew Koleros: [00:15:45] My name is Drew. I'm a senior researcher at Mathematica based out of Cambridge, Massachusetts, and have a lot of different experiences in this space. But I think what I wanted to bring today was the perspective of a large evaluation firm like Mathematica, an organization that some might say is really benefited from the white dominant culture in building strong relationships with a lot of philanthropic foundations over the years, which opens up doors to us, to lots of different

conversations that many are privy to or excluded from. We also partner with a lot of smaller evaluation firms, so we play an interesting anchoring position in some of these ecosystems, and that's kind of some of the perspective that I want to talk to talk about today as part of this panel. So I was going to say trust, but everybody else stole my answer. So maybe I'll talk a little bit about why I think trust is so important, particularly in evaluation contracts. I think in general between funders and organizations that they're working within this grant or contractual relationship trust is key, obviously, as everybody's been talking about. But I think evaluators have a particularly important role here because sometimes we're the honest broker of hard conversations between funders and their grantees. Sometimes the power dynamics don't allow funded partners or other organizations to say what they really want to say and we can be their mouthpiece. We can help to amplify voices that might not be able to be amplified otherwise. And building that relationship where we can provide that to a foundation client, for instance, in a way that they can actually receive it in the right way and then act on it is really important. So I think especially in evaluation relationships, building that trust and relationship early on creates the conditions for us to sometimes have those hard conversations that they need to hear. As Dr. Monique was just talking about. Thanks, everybody. Nice to be here with you.

Q: BARRIERS & STRATEGIES TO EQUITABLE EVALUATION

Andres Castro Samayoa: [00:17:56] Thanks all for getting us started with this very clear idea of the importance of trust as a cornerstone of effective relationships, of striving for radical honesty in the way that we enter these conversations. The follow up, I think, to this is to then say we have this sense of what we're aspiring to. Let's consider all the things that might be getting in the way as the barriers to really try to cultivate these meaningful and deeper relationships. **So I'm curious to hear from all of you as well in terms of what are some of the specific things that are getting in the way? What are some of those common barriers? And then how have you been working to try to chip away at them? How is it that you're navigating strategies to try to address those barriers?** Min, I wonder if we could get started with you.

Min Ma: [00:18:45] So to start funders and their partners, grantees, etc. have limited time to devote to evaluation. They're doing so many things, they're implementing programs, they're building community engagement. And so one barrier that comes to

mind is the amount of time it takes to have these conversations and to be thoughtful. Even before your partnering together officially in the proposal process as you're kicking off a project, how do we create time for this and make it really count? And so when I think about what has worked really well, I have appreciated the RFPs that my team looks at that a lot of them this year have included an invitation to ask questions or to chat prior to even submitting. And I'm curious kind of how that looks and feels on the funder's side because I know that takes a lot of time, but those early conversations are really critical in better understanding how much time and willingness there is to spend on that and then allowing a scope of work to come out of that. That really works for our team and works for the folks that we're partnering with. I think it's really useful to spell out explicitly what the expectations are of our partners whether that's the people funding us or commissioning the work, or it's the grantees or the program participants. And then to have that all on the table, to be able to check our assumptions and make sure it's going to work and make sense, I'll stop there.

Drew Koleros: [00:20:50] A lot of my work is around systems thinking and systems change and complexity. And I think that when you brought up this question around the barriers, I think one of the main barriers is that when we enter into these relationships thinking it's a simple situation or a simple problem and not embracing the complexity of the situation we're in so simple situations where it's predictable and you know what to do lends itself to plan and control fixed contracts, fixed work plans, defined budgets, clear milestones, and deliverables get the work happening really fast. And at the last workshop we had, one of the pre-reads was around the characteristics of white supremacy and a lot of those characteristics really resonated with me around fast and urgent timelines, perfectionism, the sense of urgency, a need for written word, things written down and memos and written down and work plans and all of these different things. Whereas when we think about entering into more complex situations, we're thinking a little bit more about embracing that uncertainty that we're not really sure how this is going to go. It needs to be a bit flexible. So working to establish the bounds or the parameters of the boundaries of the work that we're doing early on with our partners, I think is really, really critical. So taking space to get to know each other, building those relationships, realizing that it's uncertain and we're not quite sure how to get there, but we'll keep open communication together. And allow a little bit of trust on both sides to start to experiment and probe and sense and figure out where to go from there. The other part of the analogy around complex systems is that I think a lot of this work is

bringing foundations, and I'd be keen to hear Rory thoughts on this as well, bringing foundations along to this journey to understand that they're also an actor within this ecosystem, that simply by giving money out to funded partners or engaging in this, you're not external to the system and just dropping some cash in there. You're now an active ecosystem actor and with that brings conditionality, brings power dynamics, brings a lot of different things and helping to understand that role that you are now playing in this system that you've entered, I think is a key role that we need to start to engage in as evaluators with our foundation clients as well. So won't try to belabor the analogy any further than that,

Rory Neuner: [00:23:40] Philanthropy and foundations are a huge buyer of evaluation work and we drive for better or lots of times worse. we drive how the system looks and works and functions and dysfunctions. I could talk about this endlessly, but I certainly won't. I loved Dr. Monique talking about speaking in plain language and also just being really honest about what's going on. And I think sometimes even in foundations, we look monolithic and we look like an organization, but like inside, there's all these other power dynamics happening, like the learning and evaluation teams oftentimes in foundations kind of don't fit in, We're a little different than like the program officers, we're like the program folks critical friend, right? We ask them questions about their strategy. People who consider themselves experts, particularly in a white supremacy culture framework, don't like questions. Questions are hostile to expertise. So when you're a learning and evaluation officer instead of foundation, sometimes it can be a little tough because you're like the person asking these questions and you're not even in charge. They're like, who are you? You're not the president of the foundation. You're not on the board. What, who? I think we could all talk about this more to have a better understanding some of the power dynamics that is not meant to be an excuse about what goes on. There's a lot of terrible, terrible, terrible foundation behavior. But I think I think in terms of the ideal working relationship, I think goes back to the first question about trust and really people getting to know one another and being able to talk more openly about their work and ask your funders questions about what they're trying to accomplish. As a part of like understanding their perspective and where they're trying to come from. But yeah, I agree with some of the initial comments about how do we move away from these very transactional written down points of interaction and toward much more human kinds of interactions.

Monique Liston: [00:26:08] I just want to clap again and again. Just reiterating for everyone, like foundations are a mess and it's exhausting for everyone who is trying to do any sort of evaluative thinking, whether you're in them or outside of them. Like it's just a mess. So just yay for doing good work and keeping me employed, but also a mess at the same time. But what I think one of the common barriers just to say something different than all the other brilliance that's on the panel is that even I get fooled sometimes to think that like people are prepared to engage a Black woman. And I think a common barrier, the truth is people aren't they don't want to, and they want to hire a firm like ours because it's cool, it's hip, it's sexy. Especially since 2020 with the murders of George Floyd and Breonna Taylor. We're the hottest thing on the market because we're a bunch of black faces. And then when we come in with a framework that's questioning anti-Blackness and white supremacy, it's like, hold on now. We just came here to give you some money and for y'all to cosign what we're already doing. And that creates a lot of tension. And so I think about the initial barrier is us not recognizing that the internalized ways in which white supremacy culture works in our most well-meaning and social justice, forward fields is often present and insidious and creating a lot of trouble even when we want to act like it's not because they give money to the right organizations. And I think that barrier of acting like it doesn't exist is what causes a lot of trouble. But it catches me off guard sometimes because I'm assuming like, hey, you saw my website, you see what I can do? You heard me right, you hear me speak now you're ready to engage. And it's like, Hold on. No, we hired you to be cute. We hired you to cosign. We hired you to not take your job that seriously. And that is a large barrier in terms of like creating the ideal working relationship for how we have addressed this. And I will stand by this until I'm no longer able to hold this position. But so often evaluators are put in this position to like go along with it because this is how you get paid. And I remain of the position of like, we're going to tell the truth. So if this isn't working, we're going to say it. And we as evaluators kind of speaking to what Drew was saying earlier, we're going to stand there and say like, this is not working based on what we said. It's not working. It's not right. It's not equitable, it's not good. And we're going to continue to say it and we're going to give you all the information that you ask for that says that, and you can do what you want with it. But don't ask us to reshape what we have found to fit your presumed narrative of being good. And that presumed narrative of just because you work in that social justice field, just because you're a part of a charitable organization, just because 501C3 is associated with you doesn't mean that you're good. And that fear of not being good is the largest barrier to overcome of

like just because we're asking questions like Rory was saying, just because we're curious or just we're pointing out that white supremacy culture is a part of all of our lives and we need to address it somehow. Doesn't mean you're bad. It doesn't mean you're bad. And so we need to get off of that good, bad, racist, not racist sort of paradigm that shapes our organizations and therefore the work that comes out of organizations and get into how are we actually improving the community, addressing equity, making sure that this challenge is overcome and get rid of that notion of like, I'm good or bad, I'm right, I'm wrong, I'm racist, I'm not racist. It's we're all learning and we have to get into a space that we learn together.

Robert Torres: [00:29:57] Yes. And certainly echo, what everyone has already said, I think for me just being super micro about the work that I do. So much of our giving was directive as a legal requirement as I talked about. So the evaluation work, as I mentioned, was negotiated a good year before I started and was an eight-year kind of contract. So in terms of the barriers that we encountered, we didn't really foresee COVID, right? So like that wasn't built into flexibility within the contract and how we might think about flexing our health priorities or strategies or what we're willing to fund. We did have a moment of pause and spoke with our Community Benefits Advisory Committee and really tested the pulse to see does this still resonate? Are these still the right priorities? And, you know, similar to the foundation space, there are so many levels of leadership within that community advisory committee and then that particular hospital's leadership. And in the larger health system, there's the large, you know, hospital leadership team and then that particular community benefits advisory committee and just many layers who all want to weigh in. And similar to Dr. Monique, who already really believe that we're already doing good and this is kind of a no brainer. But within COVID and knowing that certain communities were impacted more. Was there a moment of pause to really look at those populations, considering we have this DPH kind of clock ticking, that leadership is really afraid of not spending funds within that required time frame. So I think there's just different opinions of how flexible we can be beyond those requirements versus just what is set in stone and what do we absolutely have to do. And in the time of COVID, DPH was certainly overwhelmed with their response, as we're all the different health systems so it just created a kind of a time of uncertainty. And even though there was opportunity to pause, I still think we did the best that we could. But given what we know now, there may have been more opportunity to pause for a bit longer and to see where the landscape was going to fall

with all the different government interventions in terms of flexible rental assistance and everything else that that was there. So I think we've done our best to build a relationship there. I think in hindsight, to get ahead of some of the barriers, we could have thought through some of the possible circumstances that might have happened throughout the eight years and built in a little more flexibility, even in terms of the number of grantees that we were able to assist. I think one of the problems that I've had to deal with is that there was a number of grantees that was negotiated before I started, and in our particular division we have \$18.5 million that we need to invest over a period of eight years. And so the number 18 was thrown out in the beginning, and I don't know what the logic was, but that really means that each grantee would get about \$1,000,000 each, which I don't think was the purpose. And especially in COVID, when there's a lot of smaller organizations who could really benefit from smaller amounts of money or who might even be burdened by receiving \$1,000,000 and trying to manage it, especially when the community and even leadership is pressuring us to get past some of the usual entities, you know, giving \$1,000,000 to an organization that's never managed, that might not be really helpful without the proper support.

Q: ENTERING CONVERSATIONS AS AN EVALUATOR

Andres Castro Samayoa: [00:33:13] I'm hearing from all of you, even in the context of how we've started this conversation, of sort of striving towards trust building, how there are opportunities or in some ways setbacks in terms of how we're building that trust as a result of misalignment of communications, of priorities or of perhaps not necessarily being really aware of how much we can actually change in terms of the relationships that we're building. I really would like to for us to lean into this idea of the relational components of the conversation that we're having in the context of really specific things. **And I'd like to consider how is it that you might invite those who are here today, who are evaluators to look into the way that they enter these conversations? When the earlier parts of it, when we're thinking about negotiations of scope of work in a manner that foregrounds and allows us to really put equity as the central component of how we're going to engage in this relationship.** Dr. Monique, why don't we get started here?

Monique Liston: [00:34:19] I think this is so important and it's like sort of the first sort of space where you can make some pretty strong declarations about like, what does it

mean to engage in the equity focused scope of work? One I'm always talking about like budgets do matter and be like as clear and as upfront about that from the beginning and even limit your engagement until you're sure about the budget. I know for us we're always talking about what does it mean in the middle of an anti-black white supremacist world, what does it mean to take up the time and energy of black women who could be saving their communities? So you can ask us lots of questions. We would love them. How much is your budget so we can talk about whether or not that's our effort or we can pass you, refer you to someone else. The other thing is being able to think about what is absolutely necessary regarding everything else we mentioned the radical honesty, radical vulnerability and trust building requires time. And so, so often we jump into scopes of work that are like first deliverable due in 30 days, blah blah blah. It's like, how is that possible? I don't even know your name yet. And we need to get into a space where we're actually creating the relationships necessary that makes these deliverables that we get at the end most meaningful and that time isn't free time. It's compensated time for the evaluator. And so making sure that that is a part of the work as well. We also take the opportunity through our scopes of work to be very upfront about who we are and what our boundaries are thinking about often because of our very race forward approach, we're hired as evaluators, but they want us to be their race conscious therapist as they engage with their learning about their white identity. And it's like nowhere in our contract does it say, I'm doing that. And so we're very clear in the offering. Like, here is the boundaries of our work. Here's how you can reach out to us. And here are some other resources for all these other questions that are going to come up for you that have nothing to do with me, but you're going to project onto me just because of my Black face. And so being clear and just aware about your own identity and how it could show up in a particular space, whether it's a evaluative project in which you share an identity with the population of concern, or might have shared an experience with the population of concern, being aware of your own boundaries in that is really, really important just for your own care, but also for people not to take advantage and think just because you share one of these identities, they can pick, poke and prod at you at every moment just to get things done. And then I'm also holding one of the disruptions that is important to us in those scopes of work is pushing on something that happens a lot is like this reimbursement model and it's like, I don't know how you expect me to pay all these people to jump into this project when you're putting me on a I don't have money to make back here that I can use to upfront the cost of all of this labor that's required to get started. And so disrupting that and thinking about how

can we compensate people for their planning and design and relationship building time. So that's a part of those scopes and not something that's just presumed will happen outside of or amend it to whenever people have free time to the scope. So I think that's important. And for evaluators yourselves, just be conscious of like how are you going to feel and how much energy regardless of whatever, what hour of your workday this is, how much energy it's going to take for you to show up and process and be the most brilliant evaluator with the client that you can be.

Min Ma: [00:37:48] Building on what Dr. Monique is saying, one of the pieces of advice I wanted to share was around fee schedules, like it is okay to ask for percentage payment up front and actually no one's ever balked at that request from me when I do ask for it, which is helpful for all the reasons already stated. And then I was thinking about worship of the written word and fees schedules that are tied to small deliverables and how restrictive that can be. So I would advise against that and to build in that kind of flexibility you really need. And if you to be co creating an evaluation as you go, you just don't know what you're what's going to actually happen. And so to create a contract or a fee schedule that allows for that, I think is really important. And then the final thing I'll say, I've signed some scary contracts in the last few years, scary to a small business owner because of the this will happen if you introduce malware into our computer systems, you know, this is how much insurance you need to carry. I have insurance, but an independent consultant might not or it might be a prohibitive amount. And so just to say that these are conversations you should also be having with people when you're signing contracts and asking about them. Oftentimes I've found that it is template language and there is a little bit of wiggle room by nice lawyers on the other side of the table. And then I also wanted to share that for those of you who are independent evaluators or who work with small firms, that there are a lot of resources out there for us. There's the independent consulting TIG through AEA. There are wonderful mastermind groups where you can chat with fellow business owners. They have the topic chats monthly. The Small Business Association also has this amazing mentorship program where you if you have a question about cash flow or legal stuff, that they'll match you with a mentor with that sort of expertise for free. So there's just a lot of really great resources out there. And so you're not alone.

Drew Koleris: [00:40:27] Similar thoughts came to mind when I was thinking about what advice I would give, but I was going to provide it or share it through the lens of a

bigger evaluation firm like Mathematica, and just wanted to kind of lift up Rory's comments earlier that really resonated with me. And I am guilty of talking about foundations like one monolithic thing without understanding the diversity of experiences and people within them. And I think that in a bigger firm like Mathematica its a very similar experience. You know, Mathematica is huge. We've got standard operating procedures on how to sneeze in a place like Mathematica. Everything is automatic and automated, and you can just kind of go through the contract. A new contract comes through and all of the machines start firing and all of their standard risk mitigation processes. Mathematica is early on our journey and equity, and I'll own that. And there's a few of us that are starting to kind of push on those systems to think about how do we alter that machinery to the tradeoff between risk mitigation and inequitable partnerships, and particularly when we're setting up subcontracts or sub agreements with smaller evaluation firms that we're working with, how can we start to advance an equity agenda in that? So it comes down to things like contracting and budgets. Mathematica's lizard brain, knee jerk reaction is reimbursable and deliverables only. But thinking about what Min and Dr. Monique are saying, how could you ever grow your business if you're always playing catch up? How could you ever invest in higher staff that would help you build new business and when you work and do the work that you have, if you're only working on reimbursables and actually a lot of our foundation clients don't do that. They give us the money up front. And we often hold on to it and give our subcontractors reimbursable only or deliverables-based contracts. So fighting back at that, these non-sexy things like the contract. One of the recent fights that we've had is around intellectual property. So standard contract is that we are the prime and we always own the IP and the people that work for us or with us have to relinquish all of their intellectual property rights. Well, when you're co-creating nobody owns that IP, you know, nobody has the rights to that idea. That's something that comes out of this co-creation space that we're through. So we had to work with the legal advisor for quite some time to get that into our contracting templates and all those things exist. So now we're starting to do some internal advocacy with other colleagues at Mathematica that if you want to start entering into more equitable partnerships, here's a contracting template that looks at payment schedules differently. Here's some legal documents that look at IP a little bit differently when we're hiring a transcription firm asking questions like, do they pay a living wage to their employees? What do we know about this organization and their ethical practices and just starting to take a little bit of extra time, but to start to nudge

that machinery a little bit more towards equity. So that's kind of the experience that I can share today.

Q: BUDGETING FOR EQUITABLE EVALUATION

Andres Castro Samayoa: [00:43:45] I'll Emily's comment on the chat window as well. For folks, if you have questions that you'd like to post to our panelists, feel free to drop them in the chat window. **I'd like to transition to questions from the audience to just go back to this invitation from Dr. Monique from the beginning of really considering the budget as something that that is worthwhile for us as we imagine what an equitable relationship looks like. I'm curious about what is a budget that supports equitable evaluation look like? What are some of the green flags? What are some of the points of concern? Rory, what comes to mind for you?**

Rory Neuner: [00:44:26] I have a couple of personal experience that I just encourage, particularly the smaller firms and independent consultants to build a network of fellow independent consultants and small firms to really talk about rates and to be transparent. I think sometimes those people you can write to and say like, what are you charging to this kind of entity can be really helpful. I know that was helpful to me when I was an independent consultant and I have since given other folks tried to give advice. When I was at the Michigan Health Endowment Fund, we did a project where we engaged several evaluation consultants at once, and of course they all submitted different rates for the projects. We just leveled them and paid at the highest rate and paid everyone the same thing. We can't do that in all cases because oftentimes it's more of an atomized one on one situation. But I think the same conversations about transparency, about rates in the workplace apply, I think, to some of the contracting issues. On the direct budgeting perspective, I think there was a lot of great points already brought up, but I think particularly in cases where you're really not sure what the project is going to look like going in thinking about phasing and the contracted entities appetite for saying we really don't know what's going to happen in two months so could we make a phase two and say that in a couple of weeks we'll get there? My experience with that has at least always been that we ended up contracting longer for more phases than we even imagined when the work started. And then I think a couple of red flags, I think some bad behavior practices I've seen, I think I've certainly seen on the scope and budgeting side where like we read proposals or scopes of work, where I'm wondering if like a smaller

firm is being kind of tokenized like added to a project because it represents some kind of project diversity that the firm itself doesn't have. And it's an uncomfortable feeling to wonder like, what's really the relationship there? And I think on my side, we in the foundation world could do a better job of like asking questions about what those relationships look like. But I think those sometimes I see those and go like, ooh, or like there's nobody named in the project yet. Things like that that feel like somebody's going to be brought in to do a lot of work at a rate that's really not what they deserve. So those are just a few a few initial thoughts.

Robert Torres: [00:46:57] I think some of the problems in Boston, of course, we have some major firms who are the kind of top candidates always for the larger determination of need projects or hospital projects. I will say hospital kind of budgets for evaluation sometimes our public record, if it's a tie to a deal end, can be found on the Department of Public Health website. The problem is it shows you the whole budget, not not how much has been kind of carved out per contractor affiliated with that evaluation. To Rory's point, I think bringing together smaller, independent evaluators who can pitch a project together would be really helpful so that we could start to land those bigger projects in the non kind of usual evaluators of the larger firms I think would be ideal. And in terms of the red flags, I think there's a lot of expectation from some of the health systems have not done a lot of evaluation work with independent evaluators. And so just taming some of the expectation back and even owning in the front or in the negotiation how much they plan to advocate for the grantees on occasion or even push back on what the what the evaluation requirements are of the individual grantees, I think has become burdensome. And in a health system where a lot of people feel like they are the experts, even if they're not in evaluation, just knowing that that may be a red flag in itself of who is managing the contract. They understand that but they're not an expert in that, and that's why they're bringing on this independent evaluator.

Min Ma: [00:48:40] I don't know what the concrete suggestion is, but I really appreciate how honest other panelists have been about the challenges and power dynamics they're facing, even internally. And I just want to share that a challenge that I face in budgeting is how do I, as I grow my team, how do I sustain salaries? And I'm kind of at the cusp of being able to handle larger contract sizes, which are so helpful. If they're multiyear, then I know I can pay X number of team members for so long, but also thinking about what is not considered to be billable. And I saw a comment in there,

Trish, in the chat about reimbursing for time versus just total contract amount and what it takes for our team to be able to do this work thoughtfully in a way that we feel like we can stand by. And I'm thinking about the time it takes to do reflective practice. We do this twice a week and carve out time for that. We have learning communities with our collaborators. We participate in trainings and in professional development. You know, I want my team members to be a part of SCENE. These are all non-variables and are so much easier for larger firms that I've worked at in the past, I got to enjoy that and I want my team to be able to too. And how do I budget in a way without the high overhead rates that larger firms have. And so how do I budget in a way that kind of enables us to do the work the way we want to do it and the way we need to to care for our team members. And so that's just a challenge to highlight and is something that I'm constantly reviewing and trying to figure out a better way to do it.

Monique Liston: [00:50:48] Min, that exact thing, right? I'm going to speak to that exact thing because I also didn't intend to create a business that employed 12 people full time. But here we are. And being able to create it has been a part of some magic formulas in my head that I don't know how to translate to other people yet. I'll work on that. But it's making sure that we know that y'all cannot compensate me for the time and energy that actually is exercised to get something delivered to you. One, there's this inherent literacy that I have around race, gender, and queerness that you're just not able to have. And that's part of my brilliance of how I show up. And I acknowledge that right at the beginning. This is a part of working with our wonderful team. And so understand that our budgets, we don't present in hourly budgets because here is a well-being measure cost in order for our brilliance to be able to show up with you and here is it. And I put it as full team equivalency because it follows the FTE, and it explains whether that's for members of our team. Three members, two members at 25% of their time, half their time or more. And being able to talk about it like that also helps us because our team, if we gave you an hourly breakdown of all of the ways we thought about considered, constructed, reflected on that you would not ever be able to compensate us. And so we talk about that right at the offset. And I'll admit that challenge still exists. Like we work with Mathematica, and we have all of this brilliance and then it's like, here's this template for the hourly thing. And I'm like, Drew, what the hell? We just talked about this and it's real. And so the numbers and Drew knows this, there's numbers in there because the numbers just add up to a dollar amount and the numbers make not never mind to our team. They're not they're not going to equate to the actual efforts. What's

there is we know this amount of money will allow us to get to this end. And here's how we'll push on you around the timeline, around the engagement that allows that to help, which is cumbersome. Right. And it's a whole freedom revolution activity that no one's compensating Monique Liston for. But it's necessary because that disruption is real, because all of these other things of like where do you put in consciously disrupting unchecked whiteness in a meeting onto your deliverables, right? Where do I put in the processing of harming because one of my staff members was misgendered in a meeting and now they're feeling insecure and don't want to be in the project. And I spent the next 3 hours doing that. There's no space for me to do that. But the fact that I created a space for it, which also gets you really good, meaningful information and results, means that you should pay for all of the caretaking that's there. And so being able to present a budget using that language has been really helpful for a lot of our clients and it has allowed a lot of the shift to exist of, stop asking us that because you couldn't even pay for it if you wanted to. And breaking it down to the hours and we actually worked in those hours, you wouldn't get what you want. And so just being able to be radically honest and transparent about that has been really helpful in our in our budget movements. And that doesn't mean we don't have like budgets that pay our bills and understand like what goes where. But it's not connecting all of the brilliance that we do just an hour of time and acting like that hour of my brilliance is equivalent to the hour that you presume of what it takes to get answers to questions that you don't know how to answer. Like it's just, no, here's how the effort actually looks and here's what the wellbeing budget looks like for our team. So feeling through everything that you're saying, Min in this ongoing push as we continue to budget from the outside as independent contractors.

Q: CONTINUING EQUITABLE WORK DURING ORGANIZATIONAL CHANGES

Andres Castro Samayoa: [00:54:23] I want to connect this effort, as you were mentioning right now, even working with Drew, for example, on Mathematica. It takes a lot to be able to have these conversations and someone in the chat window just put in. Chantal, this question around what happens in the context of trying to build these relationships, if you happen to have a specific champion and that person transitions to a different location, right? You sort of have this vacuum. **The question is, how is it that we can continue to strive for this equitable work when a key champion or thought**

partner leaves an organization and their replacement does not share the same value or enthusiasm for equity? So open question for any of the panelists to respond to, how have you approached those moments? Drew, do you want to get us started?

Drew Koleros: [00:55:24] It's a great question, and I think everybody's pausing because they're all deeply reflecting on how to answer that. And I don't have an answer to it. I can tell you how we're starting to try to approach that is through team culture in that not allowing this work to sit within an individual but within a wider team, starting to do the internal work at a group like Mathematica that's going to allow us to do that external work. And there's a lot of internal work that we need to do. But starting to. Just so much that I've learned working with Dr. Monique, I'm starting to bring into some of my other teams around relationship building, trust building, unlearning, mutual respect and accountability, dignity in the way that we work together. All of these concepts are starting to trickle in to how I engage with other teams and other projects. And I think that slowly you're starting to try to infuse some of these cultural norms, that there are other ways to do work or other ways to engage with groups. And hopefully you'll start to this won't be seen as an equitable partnership. This will just be seen as a normal human way to interact with other groups at different levels. So that's just one example of how I'm trying to start to address that, but it's a great question.

Monique Liston: [00:56:55] Again, this isn't the answer because it's a shitty situation when it happens. That's just the honest part. But I think we need to take a step back and realize how much of a red flag it is to have something depend on one person and that one person leave. That's a major red flag. That means this organization probably isn't equipped to do a lot of the things that they're claiming that they're doing if one person leaving is going to actually put some of the things that we want to practice in turmoil. And I think to Drew's point, it's like the organization has to build the culture. And I think we need to stop thinking or fearing that moment when that one person leaves and zoom out that just because that one person is a champion doesn't really mean that we're in a good situation in the first place. And so I think that sort of lens allows us to understand the context of the situation. Our organization does a lot of work with training and learning with organizations around racial equity concepts, and that champion model is one DEI strategy that's often there, and we flag it as the first red flag of an organization that's not going to be able to have any sustainable work. And so I think that prevents us

from like, oh no, that one person left. And that's like, well, we saw that coming from a mile away. And that changes sort of your engagement and your intentionality and working with the organization. So just flipping the script of like as opposed to saying that's something that could come up just addressing like it's an issue as soon as you see it and being able to be recognizing and conscious of it. And then for the other organizations to know that's a cultural problem that definitely needs to be addressed if we're going to try to strategize or really internalize or sustain any of these equity strategies.

Andres Castro Samayoa: [00:58:39] Thanks to all of our panelists for getting us started with this sort of first part of our gathering today. I want to be mindful of time so that we have ample opportunity to be able to engage with each other as an audience in the small groups. So I'm going to turn it over to Emily so that she can do that.

Emily Gates: [00:59:00] Welcome back, everyone. Letting you know the recording is on. So we're going to have a couple of minutes to share out across groups. And you also have access to the slide deck so you can see some similar themes across the breakouts. I'll turn it to Maya, who will facilitate.

SMALL GROUP SHARE OUT

Maya Komakhidze: [00:59:21] Hello, everyone. So I was listening in on one conversation, looking at the notes in another, and I think it was a very insightful conversation, the one that I listened to, and based on the notes, other groups also had very interesting conversations. So we want to give you a chance to share out main highlights of your discussions. We can start with group one so that somebody from group one can share with us what our main takeaways from your conversation in the group.

Group 1: [00:59:55] Hi. I was a facilitator for group one, but my fellow group members should feel free to jump in and Chantal, Trish, Sarah, and Matan please jump in if I get stuff wrong or miss important points. So we talked about barriers, we talked about various strategies. But I think the sort of the overall themes that we saw were first of all, like all the things that we were talking about were things that were occurring in systems like it isn't just individual problems. Systems matter. And then at the same time, these

systems are made up of in Trish's words, fractals and individuals and we all do kind of have a role to play in how we show up in these spaces. And then Sarah added that the patterns that we're setting off with our small decisions and our interactions and pacing and everything, there's a butterfly effect that influences the systems that we are in. So generally systems and also relationships.

Group 2: [01:01:36] For group two the key highlight that we thought tied together a lot of what we talked about was to be explicit about the financial costs and the time costs of each piece of things, because that's the that's when you can actually start to work together and compromise and brainstorm around how to manage those costs rather than having them all be held by one partner. So that's including costs for co-designing for the time it takes for relationship building, for donated time that different people might contribute to a project that wasn't originally budgeted for or maybe was intentionally not budgeted for if it's considered as a donation, and also for participant time.

Group 3: [01:02:41] So our one narrative that really tied everything together is there's still a lot of work that needs to be done right. We're talking about things here, but there's really this need to commit and start making a change of some sort in our practices or in how we operate. And there's just so many things that need to be done is like where we really settled at the end. We also talked about this idea of doing "it" and defining what it is when we're talking about approaching evaluation with the racial equity lens. So Alyssa, I don't know if you wanted to jump in because we were talking at the very end about what makes these approaches better than they are now and how can we actually show this? Maybe this is a topic for a future conversation, but I think in the panel we talked a lot about like contractual pieces and how the reimbursement model doesn't work and building relationships takes time and that needs to be compensated in contracts, and things like that. I think there's more to doing evaluation with a racial equity lens that beyond some of the things we mentioned there, and I would love to get deeper into that and what that looks like and the methodologies that folks use and have found to be effective at a future session. But defining the "it" of what "it" is that takes all this extra time, I think is important, especially when you're trying to convince a funder that they need to pay for it.

Emily Gates: [01:04:23] Alyssa, you're plugging our next session. So our next all-group session won't be until the fall, but it's going to focus on the methodological process of evaluation from setting the questions to what the process looks like.

Group 4: [01:04:47] So I had a dream team and there's a ton that I have on my slide, so I probably will need the help of my group. But barriers there are a lot of good ones, evaluation as an afterthought and evaluators not being involved in the conversation until it's too late and the funding is set and the timeline is set, and those expectations not being realistic. For evaluation providers, capacities, and the budget because it was all an afterthought. Ingrain policies and procedures that aren't flexible, especially with larger funders and especially government funders. And I really liked this one from Drew, people's past experiences with evaluation harm and trauma and other ways that people have assumptions coming in understandably or based on personal experience, where evaluation was just about assessing merit and value and not about growth and not about relations and relationship building and community all that. And also the idea, the traditional assumptions about evaluation being about a third party who needs to be distant and impartial, and that objectivity or neutrality can exist, and that that's not necessarily what evaluation is about, and especially not equity-oriented evaluation, that that can actually be a way to perpetuate inequity. And then also tons of strategies and learning. Based on investing those barriers that are probably too long to mention, but they're all here on the slide and some good actions kind of conversation about flipping the script and encouraging funders to do the work, do some of the work of maybe they're doing site visits and they're doing some of the traveling and reaching out to build relationships and evaluators, facilitating or negotiating the power dynamics involved between funders and people receiving the funds. And like was mentioned before, kind of being almost like a power broker and trying to advocate for the clients. More forward-thinking, doing away with RFPs.

Emily Gates: [01:08:02] We have our raffle winners, but I think what we'll do for now is we'll email you if you won to save the last bit of time for Min and Maya to share their announcement. And also we want to be thankful to the note-takers. So and in future sessions, we are looking for people to step in and take notes. It just helps us record what's being learned to share out. So we will follow up with the raffle winners and the note-takers with our thank yous and then Min and Maya make your debut here.

MAPPING SYSTEMS APP

Min Ma: [01:08:33] So we're really excited to be finally launching our map. And so for those of you who haven't seen this yet, we're building a map using an app called Some App connected with Kumu, which is designed to map systems. And the goal for this is really to well, there are several goals. One is to help grow your network. And I'll just say thank you to the people who helped us pilot this. Even yesterday, as I was playing around with the map and looking at different profiles, I saw, oh, I was actually on a call with Carrie this morning, and I didn't realize these things about her that I need to check in with her on next. Just some ideas. So who knows what you'll find even about the people you think you know. The other purpose of this is for us to do a little bit of light evaluation around this collaboration and community that we're trying to build to help us learn about how things are changing and what kind of difference it is making for each of you, if any. And in addition to that, there's a research component to this. And so this is all to say, we're going to launch the map next week where we just submitted for an amendment for IRB. And so we're working through that. But next week you will receive an email probably with the recording of the session and any follow-up. And the email will allow you to opt-in and we will ask you to complete a consent form because this map is public and because of that research component. So you can consent to just participate in the mapping which is public and all your information is there and you can separately consent to being a part of the research in the first. There's a little bit of a stipend associated with that for the first hundred people who consent and get themselves mapped. And so I forget what the incentive is, I think it's like a \$10 gift card, so we'll have details for that. But you could just opt into being on this map and then we've started creating some views. So you can see here there's going to be the directory of shows that shows people without their connections, there will be ways to view based on interest and expertise. And maybe you can find folks who have expertise in areas that you want to learn more about, that you want to partner with, or that you want to start partners in those areas. And then the third one that we have so far is connections. And then I popped this in at the very top, the sector of primary workplace, region, you can filter people in the directory that way. So you can look for evaluators in Maine, you can look for evaluators who work as internal evaluators and see who they are and make connections that way. So this is all coming to you in a lengthy email that you'll want to skim next week. And I did start a chat in a channel in Slack that is simply labeled community map. But if you have any issues signing up, Maya and I will be working

through bugs with you as we go. But we're all learning as we do this. And so we appreciate any feedback you have. And for all those pilots, any feedback you've given already.

CLOSING & ANNOUNCEMENTS

Emily Gates: [01:11:56] So with that, just a couple closing things. If somebody would drop the feedback form, it's very short 2 minutes or so in terms of this event, if you would take a couple of minutes to give us any feedback on the event and Min said you'll get the email next week and this will go out to the whole network. I think we've got 221 people now that are part of SCENE Collaborative and then we've got an intention to have a to host a meetup. We've talked about collaborative streams before where you can work with a team on a project, a specific thing you want to work on together. So we'll have a meetup for that this summer again, virtually just because we're place-based, and that way more people can access it. And there is our website. We gave you the link to the study, so we're here, shoot us an email if you have questions or other ideas. Otherwise, with that, we'll close. And again, appreciate of our panelists and all of you for making time and being part of the conversation.