SCENE

Strengthening Capacity for Equity
in New England Evaluation
Collaboration

Our Website

CO-CREATING CONTRACTUAL & ORGANIZATIONAL SUPPORT FOR EQUITY:

A Dialogue with Commissioners and Evaluators

April 7, 2022

Agenda

3:00-3:05 Welcome

3:05-4:00: Panel

4-4:05: Bio Break

4:10-4:50: Group Discussions & Share Out

4:50-5:00: Invite for Social System Mapping, Raffle & Next steps

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Welcome from Your Co-Hosts

Min Ma, Founder and Principal,
MXM Research Group

Patricia Dao-Tran, Founder and Principal, Resonance Data Collective

Emily Gates, Assistant Professor, Measurement, Evaluation, Statistics, and Assessment (MESA), Boston College

Andrés Castro Samayoa, Assistant Professor, Educational Leadership & Higher Education, Boston College

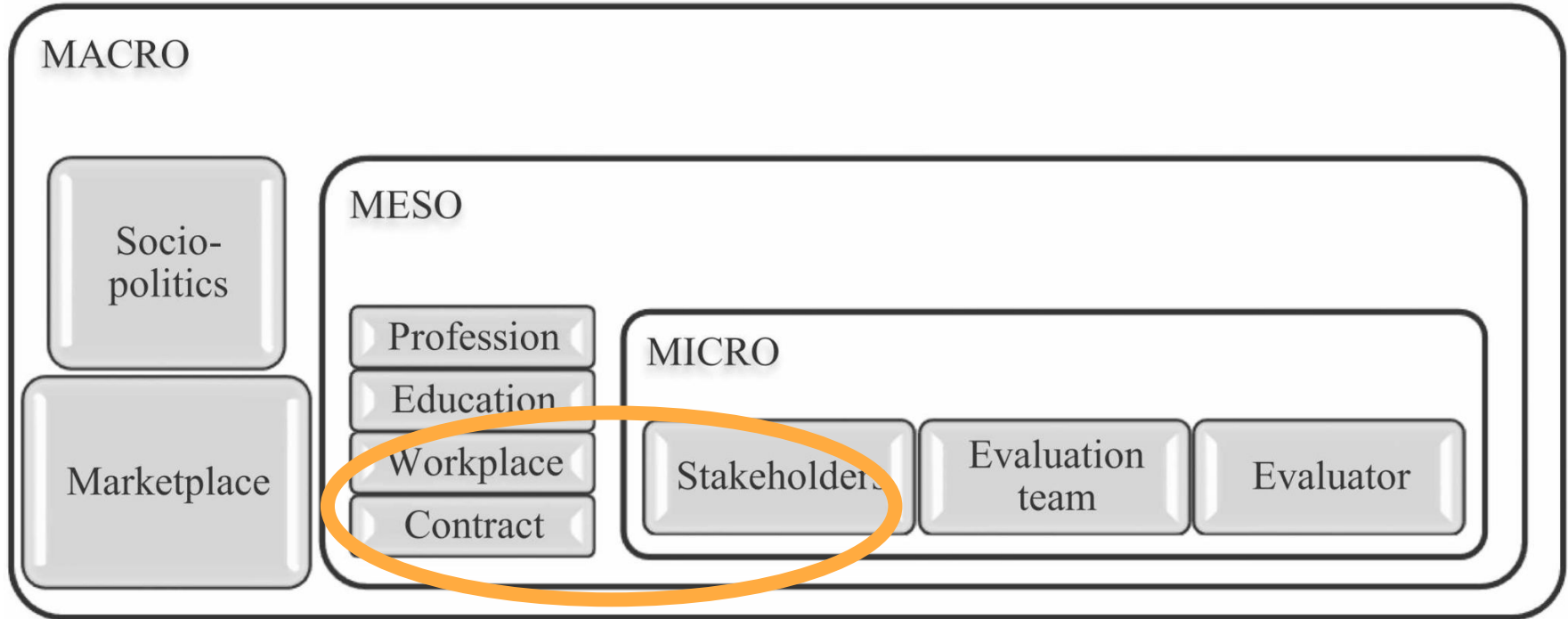**Lisa Goodman**, Professor, Counseling, Developmental & Educational Psychology

Joseph Madres, PhD student, Teaching, Curriculum, & Society
Maya Komakhidze, PhD student, MESA
Kayla Benitez Alvarez, Undergraduate student

It Takes an Ecosystem: [SCENE Study Publication](#)

Resources (links and descriptions [here](#))

- Evaluation as an Ecosystem AEA365 blogpost

- We All Count's Introduction to the Funding Web

- From Contractors to Conduits: An Exploratory Dialogue among Funders and Evaluators

- Developing More Intentional Budgets AEA 365 blogpost

- Radical Reimagining podcast episode with Rory Neuner

Share other resources in the chat or Slack and we'll add them.

Panelists

- [Drew Koleros](), Senior Researcher, Mathematica
- [Dr. monique liston](), Chief Strategist & Joyful Militant, Ubuntu
- [Min Ma](), Founder/Principal, MXM Research Group
- [Rory Neuner](), Learning Officer, Barr Foundation
- [Robert Torres](), Boston Region Director of Community Benefits, Beth Israel

Questions

- What do you see as an **ideal relationship** between funders and evaluators ? How can each group build this relationship?
- What are some of the **common barriers** to the ideal working relationship? How have you addressed these?
- What **advice** do you have for evaluators looking to negotiate scopes of work to allow for more equity?
- What does a **budget** that supports equitable evaluation look like? What are red flags? Green flags?

Small Conversation Groups

Your Turn: Small Group Discussions

- **Introduce** yourself, your role/affiliation, and what brings you to this work (5 minutes)

- Questions about in/equity in funding & contracting for evaluations (~6 minutes per question):
  - What are some of the **common barriers** you face or hear about?
  - How **strategies and/or learnings** have you tried or heard about?
  - Within your sphere of influence, what **actions** will you (or could you) take?

- Record your group's **highlights** to share out with the larger group. (Last 5 minutes)

Group #1: Notes

Record brief, bulleted notes by category. These will be shared for cross-group learning.

- **Barriers:** urgency, staff retention, treating people like interchangeable cogs, deliverable schedules.

- **Strategies/Learnings:** sequence instead of timeline, slowing down for relationship (re)building, following people across different jobs. depending on affiliate orgs, capacity building for equity culture. up-front conversations before writing RFPs.

- **Actions:**

- **Key Highlight:** Systems matter. Not individual problem, an environment. AND systems are made up of fractals and individuals, and we have a role to play in how we show up. What patterns we are setting off with our small decisions, interactions, pacing, etc.

Group #2: Notes

- Barriers:
  - Rare to have funded time for early relationship building and design
  - Rare to have co-design explicitly shared in RFP
  - **Needing to start fresh with new people as people involved with evaluation change, contracts don't build that time in
  - Hourly vs. flat fee - who takes the risk if the work takes longer than expected? Funder? Evaluator? Evaluator subcontractors?

- Strategies/Learnings:
  - Talk about who takes the risks openly
  - Say "We can't do all of this with our budget. Would you be open to proposal with a higher budget?" -> but does this work? We might need the relationships.
  - Try to determine how values are aligned across evaluator and contractor early
  - Advocate for greater participant stipends and explain why (may get a lot of resistance!)

Group #2: Notes

- Actions:
  - Be transparent about when we donate time so commissioners can calibrate how much things actually cost
- Key Highlight:
  - Be explicit about costs: for co-designing, for relationship building, for donated time, for participant time

Group #3: Notes

Record brief, bulleted notes by category. These will be shared for cross-group learning.

- Barriers:
  - Deliverable focus- RFP process and timeline—all before we meet the people; not all RFPs are created equal—sometimes we dont know what this is created for? Capacity of organizations to ask for what they need rather than what they think they SHOULD need
  - Audience- Who is the eval for?; Information for themselves; for teams to reflect on their work; these might not be the same things as what is helpful o funders; Who is the audience we are creating for? What do we do when interests dont align?
  - Lack of knowledge on the funders side of what all goes into the process
  - Client never really knowing what they want; do they ever know what they want? How do you know to protect yourself? Clear constant communication—takes additional bandwidth

Group #3: Notes

Record brief, bulleted notes by category. These will be shared for cross-group learning.

- Strategies/Learnings:
  - Taking someone elses RFP and giving to a client before; here is an outline you might want to think about before we can help
    - As consultants helping show what others are doing
  - Zoom has helped build relationships– client doesnt always know who someone is when they are being looped in; check-in are able to create opportunity for relationship building; having additional touch points is helpful
  - Big Funders–if you are in the niche that people are looking for; building a relationship with people prior to working with them

Group 3

- Actions:
  - Relationships have been built so transparent conversations can be had, and these people can see the benefits of taking this approach; while might not go in this direction, we can have these conversations
  - Power in being an evaluator, we have the ears of funders
  - Takes a lot of work to get people on board; developed relationships with evaluators, allowing for questions to be asked and transparent conversations around timing etc.
  - Talk about experience in real time working with organizations with 'equity' goals; to what extent were people willing to include? Intersectional identities need to be processed; how is everyone internalizing and experiencing this?
  - Ask in the moment
- Key Highlight:
  - There is work to be done–there is a need to talk about and make a change; there are SO many things to be done
  - Doing IT; what is IT, what does it mean to be doing work with this racial equity lens; what makes these approaches better than they are now; and how do we show this?

Group #4: Notes

Barriers:

- ***Evaluation as an afterthought***; rush to get grants out first - puts grantee on the defensive; gives a lot of power to funder up front
- ***Foundation defines theory of change*** and doesn't consult with communities and practitioners
- ***Budget being constructed before evaluator is involved*** to frame proposal, design eval work along with other design to be formative/iterative and realistic
- That upfront work takes a lot of capacity
- ***Unrealistic expectations/scope of work/timelines*** in relation to budget and/or evaluation provider capacities
- ***Ingrained policies and procedures with little flexibility***, especially with larger & gov. funders
- ***People's past experience with evaluations causing harm*** - people's merit/worth (unjustly) being judged rather than learning and growth being a central purpose
- ***Traditional assumptions about the purpose and process of evaluation*** - that a 3rd party is needed for distant/impartial evaluations

Group #4: Notes

Strategies/Learnings:
- Evaluators framing their work as helping people tell their stories rather than being assessed/critiqued and having their value told to them by someone external
- Making sure the entire programming team/organization engages with the data and can learn from it to grow
- Making sure there's budget ad time built in for ongoing PD for the entire staff
- Positives and negatives about having an external evaluator perspective (lessening/negotiating power dynamics between grantees and funders)
- Helping funders understand the value of different approaches to doing evaluation and getting the perspectives and involvement of intended beneficiaries and other diverse voices
- Annual reporting replaced with learning conversations as a dialogue between funder and funded partner
- Evaluator as trying to advocate for grantee/client in the power relationship

Group #4: Notes

Actions:

- Site visits, learning conversations and other
- Pushing back against the intellectual property issues with funders claiming ownership over all intellectual property - evaluators retaining right and able to write about and share work more broadly
- Doing away with RFP and grant writing process; instead, meet the team and giving time to design proposals after being funded - less control over evaluation from funders

Group #5: Notes

- Barriers:
  - Not just the methods, it's the ecosystem (norms, mindsets, relationships)
  - "Sprint teams" → write a strategic plan for equity in 2 months (!!) how to balance the importance & urgency of the work, while recognizing it can't be done overnight
  - Role of conveners → cultivating relationships, & challenges w/ turnovers → new staff w/ different orgs & agendas

Record brief, bulleted notes by category. These will be shared for cross-group learning.

- Strategies/Learnings:
- Actions:
- Key Highlight:
  - Sequence, not timeline

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Large Group Debrief & Themes

Notetakers

$10 gift cards:
email Joe
(madres@bc.edu)

Raffle Winners

~$20 book of your choosing - Joe will follow up :)
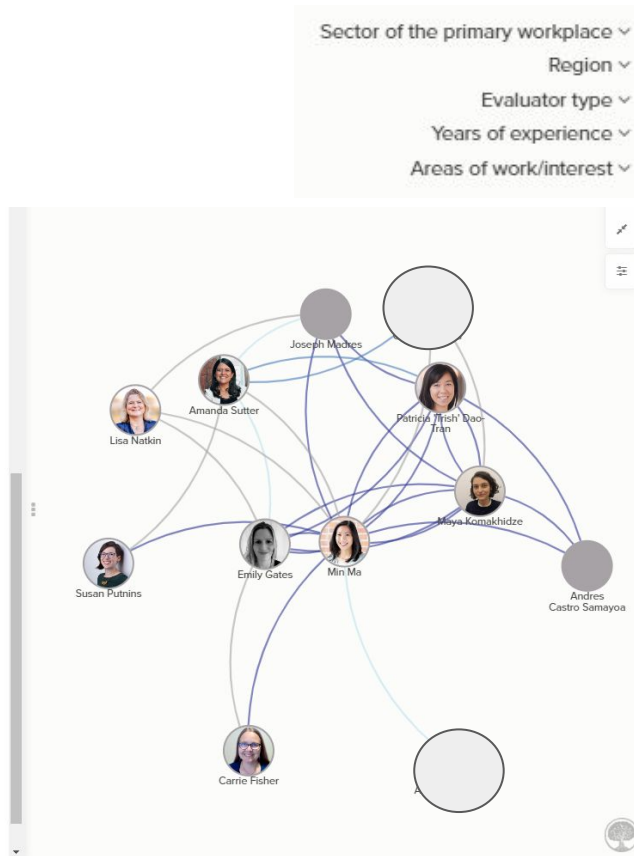
Directory - People

This view shows individual information and allows you 'filter' by region, expertise and interests so you can easily find persons by their survey responses.

Click on each node (person) to see a pop-up on the left-hand side that shows information about each person.

Once you're comfortable with this view, move to the views below to see how everyone is connected!

Interests & Expertise

This view clusters WG members around their interests and expertise.

You can use it to connect up with others to share further learning with, around the topics you're most interested in. The 'filter' at the upper left and the buttons at the top enable you to drill down into the data to make it more useful to you and easier to see what you're looking for.

Connections

This view shows how people in the network are connected to each other. To see evaluators working in a specific area you can click the boxes displayed on top or click-and-hold to focus on an item.

Sector of the primary workplace ⌄
Region ⌄
Evaluator type ⌄
Years of experience ⌄
Areas of work/interest ⌄

LAUNCHING....

Mapping SCENE Community

<u>Purpose</u>: make connections and grow our network

<u>To participate</u> (optional):
- Review this consent
- Take this survey
- Stay tuned as map updates

Using:
Kumu + <u>sumApp</u>

Next Steps

- Event feedback [form](#)
- By email next week - survey to map network

Ongoing:

- Stay tuned:
  - Collabstreams meetup summer 2022
- Engage on Slack
- Share [sign up link](#) with colleagues
- Check out [website](#) for event recording and updates
- Check out [paper from SCENE study](#) (open-access)

Additional Slides

SCENE Study Results

Click here to view the
study report

Calls for Equity in Evaluation Field

Evaluation to **advance an equitable and just society**, drawing on the American Evaluation Association guiding principles.

Advancing equity requires **new ways of being and working** as suggested by
- Equitable Evaluation Initiative
- Center for the Study of Social Policy
- Center for Evaluation Innovation
- Expanding the Bench
- Center for Culturally Responsive Evaluation and Assessment
- We all Count
- And more…

Equity & Connected Terms

- **Cultural competence** - *Cultural competence is a stance taken toward culture, not a discrete status or simple mastery of particular knowledge and skills. A culturally competent evaluator is prepared to engage with diverse segments of communities to include cultural and contextual dimensions important to the evaluation. Culturally competent evaluators respect the cultures represented in the evaluation.* (AEA, 2011)
- **Cultural responsiveness** - centers role, impact, and utility of culture and cultural context in evaluation and assessment (CREA)
- **Equity** – *the condition of fair and just opportunities for all people to participate and thrive in society regardless of individual or group identity or difference. Striving to achieve equity includes mitigating historic disadvantage and existing structural inequalities* (AEA, 2018)
- **Anti-racism** - *the active process of identifying and challenging racism, by changing systems, organizational structures, policies and practices, and attitudes to redistribute power in an equitable manner* (CSSP, 2020)
- **White supremacy culture -** *White supremacy culture is the widespread ideology baked into the beliefs, values, norms, and standards of our groups (many if not most of them), our communities, our towns, our states, our nation, teaching us both overtly and covertly that whiteness holds value, whiteness is value.*(Okun)
- **Intersectionality** - *a concept and frame coined by Professor Kimberlé Crenshaw in 1989, to describe the ways in which race, class, gender, and other aspects of our identity "intersect" overlap and interact with one another, informing the way in which individuals simultaneously experience oppression and privilege in their daily lives interpersonally and systemically.* (CSSP, 2020)
- **Decolonizing methodologies** - *challenges Eurocentric and colonial research methods and ways of knowing and privileges the knowledges and liberation, sovereignty, and self-determination of indigenous and marginalized groups* (see Linda Tuhiwai Smith)
- **Environmental justice and sustainability** - *As defined by the U.S. Environmental Protection Agency (U.S. EPA), "environmental justice is the fair treatment and meaningful involvement of all people regardless of race, color, national origin, or income with respect to the development, implementation, and enforcement of environmental laws, regulations, and policies."* (see pathways report)

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