

Approaches for Diverse, Equitable, and Inclusive Evaluation

School and nonprofit leaders can use evaluation to improve program design and implementation, to inform decision-making, and to achieve goals. An inclusive, equitable evaluation process takes into account the perspectives of program participants, staff enacting the program, and other members of the community who support the program or are impacted by the program. In addition, an evaluation that is inclusive of stakeholders' perspectives better positions the organization to communicate program successes and progress, which can improve staff morale, public relations, and funder support. The evaluation process provides structures and data to support the reflective culture of an organization.

There is growing recognition that diverse teams [perform better](#) and that it is important to bring a diversity, equity, and inclusion (DEI) lens to how organizations measure and evaluate outcomes. Within the field of evaluation, diversity facilitates a more thorough investigation of program strengths and areas for improvement. Every stage in the process of generating evidence, from designing the evaluation to sharing results, can benefit from an inclusive approach that integrates a diverse array of perspectives. Incorporating feedback from varied stakeholders improves the quality of evaluation design, data collection, analysis, and reporting.

DEI EVALUATION APPROACHES

GOALS



Engage Representative Stakeholders



Ensure Quality Data



Communicate Across Differences

STRATEGIES

Throughout the evaluation, schedule periodic times to reflect on systemic drivers of inequity and any personal biases.

Ask for and incorporate stakeholders' feedback on evaluation design, enactment, and dissemination of findings.

Encourage participation in interviews and focus groups by arranging meetings at accessible and convenient locations and times.

Collect data from individuals who reflect the group of interest, and be sure to include a sufficient number of individuals from subgroups of interest.

Examine data and the way data were analyzed for any evidence of errors or biases.

Assess whether programs, policies, or practices impact groups differently.

Use multiple modalities, formats, and languages to communicate with school and network leaders, students, parents, teachers, and other stakeholders.

Report findings by key characteristics of interest to stakeholders, such as location or racial demographics.

Consider and honor how some cultures have different norms for relating to one another or sharing information.

GOALS AND STRATEGIES FOR A DIVERSE, EQUITABLE, AND INCLUSIVE EVALUATION

GOAL:



Engage stakeholders, including representatives of the population affected by the program or policy being evaluated

STRATEGIES:

Throughout the evaluation, schedule periodic times to reflect on systemic drivers of inequity and any personal biases.

For the project kickoff, the evaluation team might reflect on background reading (books, articles, or blog posts) or other activities (visiting museums or historical sites) to improve our understanding of the systemic drivers of inequity in the context of the current project. In addition, we talk to colleagues who have worked in similar contexts to gain insight into the interpersonal dynamics within a school or network of schools.

For Example:

If we are planning an evaluation of a program intended to inspire participants to create equitable, antiracist school environments, we could review articles and blog posts about racism, oppression, white privilege, and access to power to inform our understanding of how these drive inequity in the current education system. Then we might read *Doing Evaluation Differently* ([see resource list](#)) and discuss our takeaways about how to design an evaluation that captures progress toward eliminating societal barriers to achieving equity.

Ask for and incorporate stakeholders' feedback on evaluation design, enactment, and dissemination of findings.

In designing an evaluation, we have to make choices about what types of data to collect and how to go about collecting them, as well as how to report out what we've found. The people involved in implementing the program, policy, or practice being evaluated can provide input on the best ways to understand what is happening on the ground and offer suggestions on how to minimize the burden of the evaluation on stakeholders while obtaining information needed to answer the evaluation questions.

For Example:

If teachers raise concerns about the time needed to collect data for an evaluation of a reading intervention, evaluators could leverage existing data on students' reading levels and standardized assessment scores to reduce the need to re-assess students or create a short teacher survey instead of conducting time-consuming interviews.

Encourage participation in interviews and focus groups by arranging meetings at accessible and convenient locations and times.

Evaluators can offer flexibility to people participating in the study in order to increase the likelihood that they will hear from a diverse group of stakeholders.

For Example:

For evaluations involving schools, we can meet with parents for interviews in coffee shops, community centers, and other locations to increase participation among parents who face transportation issues getting to the school site. In addition, in schools serving low-income families, inflexible work schedules pose another potential barrier to participation, and we can schedule parent interviews outside normal business hours (such as early morning or in the evening) to mitigate this challenge.

GOALS AND STRATEGIES FOR A DIVERSE, EQUITABLE, AND INCLUSIVE EVALUATION

GOAL:



Ensure quality and validity of data

STRATEGIES:

Collect data from individuals who reflect the group of interest, and be sure to include a sufficient number of individuals from subgroups of interest.

Evaluators can obtain information on the relevant characteristics of the whole group of interest. Those characteristics might be demographics or certain qualities that are expected to influence how people perceive or implement a program. We can then check whether the data gathered include people reflective of the group as a whole.

For Example:

If we conduct interviews to find out how teachers perceive the reading intervention, we might wish to ensure that both experienced and new teachers participate in interviews. For survey data, we can compare the demographics of survey responders to nonresponders to determine whether our survey respondents are representative of the school as a whole. In terms of student achievement outcomes, if we have data on reading levels for 80% of students in the reading intervention but we do not have data from most English language learners, a limitation of the evaluation is that it doesn't reflect those students.

Examine data and the way data were analyzed for any evidence of errors or biases.

Data can be messy and incomplete, and evaluators make many decisions in the process of cleaning and analyzing data. Decisions should be documented, and quality control checks can be conducted by other team members to make sure that data have been coded and analyzed appropriately. Furthermore, evaluators may wish to consider whether "mischievous responders" or reference bias (the tendency for survey responses to be influenced by social context) are present in the data.

For Example:

We can check whether interview transcripts were coded consistently across all participants and whether the summaries of interview data accurately reflect the voices of the people interviewed. For survey data, we can check whether respondents made use of all available response options. In some cases, respondents may be reluctant to rate a program highly if their school has a culture of "there's always room for improvement."

Assess whether programs, policies, or practices impact groups differently.

School and network leaders are likely interested in programs, policies, and practices that work well for all students. However, some programs are more effective for some groups than others. Evaluators can analyze the data collected to determine whether the program works equally well for all students.

For Example:

When assessing the impact of a program on student achievement, we can assess whether the program has the same impact on Latino and white students or on males and females.

GOALS AND STRATEGIES FOR A DIVERSE, EQUITABLE, AND INCLUSIVE EVALUATION

GOAL:



Communicate across differences

STRATEGIES:

Use multiple modalities, formats, and languages to communicate with school and network leaders, students, parents, teachers, and other stakeholders.

In a diverse society, it is unlikely that a single mode of communication will be effective in reaching all people. Evaluators can ask what communication methods have been effective in the past for the people involved in the evaluation and identify the adaptations needed to address any language or literacy barriers.

For Example:

We can translate surveys into the dominant language of the people being surveyed, offer both online and paper versions, and consider multiple modalities of outreach, such as emails and text messages.

Report findings by key characteristics of interest to stakeholders, such as location or racial demographics.

In some evaluations, school or network leaders might expect to see different results of a program depending on its geographic location (such as rural versus urban or different locations within a city). In others, they may anticipate racial or demographic divides in how the program is perceived or implemented. Evaluators can consult with key stakeholders to identify which characteristics are most likely to matter for the program being evaluated.

For Example:

If we are collecting Native Americans' perceptions of a program, we can disaggregate information to better understand how parents and elders responded compared with students. Doing so can help us see how trends differ among different age groups, an important characteristic in Native communities.

Consider and honor how some cultures have different norms for relating to one another or sharing information.

White papers, journal articles, and policy briefs are standard ways to share information in academic or business settings but might not be the best format to reach an audience outside of those settings.

For Example:

To honor the visual and artistic customs of Native people, evaluators could ask stakeholders to use sticky notes to create a "vision wall." This serves to both gather and share information, as people that put ideas on the vision wall can also read the ideas of others.

RESOURCES:

Doing Evaluation Differently

<https://www.racialequitytools.org/resources/evaluate/getting-ready-for-evaluation/getting-ready-for-evaluation>

Embedding a Racial and Ethnic Equity Perspective in Research Proposals

<https://www.childtrends.org/publications/embedding-a-racial-and-ethnic-equity-perspective-in-research-proposals>

Equitable Evaluation Initiative

<https://www.equitableeval.org/about>

Equitable Research Communication Guidelines

<https://www.childtrends.org/publications/equitable-research-communication-guidelines>

Project Evident: How to Apply a Diversity, Equity, & Inclusion Lens to Strengthen Evidence Building in the Social Sector

<https://toolkit.projectevident.org/p/how-to-apply-a-diversity-equity-inclusion-lens-to-strengthen-evidence-building-in-the-social-sector>

Reflections on Applying Principles of Equitable Evaluation

<https://www.aecf.org/resources/reflections-on-applying-principles-of-equitable-evaluation/>

Why Diversity Matters

<https://www.mckinsey.com/business-functions/organization/our-insights/why-diversity-matters>