



Listening for Change

**EVALUATORS OF
COLOR SPEAK OUT
ABOUT EXPERIENCES
WITH FOUNDATIONS
AND EVALUATION FIRMS**

What will it take to support leaders of color in philanthropic evaluation?

Many philanthropic funders embrace a mission of positive social change guided by a vision of equity for communities of color. Evaluation and learning play critical roles in supporting strategy and impact assessment in philanthropy. Yet too often, the foundation staff and evaluators tasked with planning and assessing social change efforts do not reflect the demographics and cultures of the communities they serve. Growing attention to the principles of diversity, equity, and inclusion (DEI) in evaluation and philanthropy is a positive start to changing these fields.

The need to broaden and diversify leadership within the social sector is not a new one. In fact, a variety of research efforts have focused on better understanding this problem. Both Race to Lead and Emerging Practitioners in Philanthropy, for example, have published research focused on nonprofits and foundations, respectively. Within the field of evaluation, there have also been attempts to tackle this challenge through professional development programs such as the Graduate Education Diversity Internship (GEDI) program as well as Leaders in Equitable Evaluation and Diversity (LEEAD).

And yet, challenges persist. More recent analysis by the Luminare Group challenges us to look beyond professional development programs and focus on cultivating practices and contexts that enhance and reinforce equity across the ecosystem of organizations that engage in philanthropic evaluation. Building on these ideas, we believe that if we are truly going to make progress on this issue, we must do a better job listening to the insights, ideas, and lived experiences of professionals of color working within that ecosystem, whose voices are often absent from conversations about this issue.

This learning brief explores perspectives from emerging to mid-career evaluators of color (those with about 10 years of experience or less) who regularly work with philanthropic clients in California. The goal of this work is to catalyze deeper dialogue on how to advance DEI principles at the intersection of evaluation and philanthropy, and more deeply understand what it will take to support the next generation of leaders of color in evaluation. Listening session participants represented a breadth of experiences across the state, yet four clear themes arose that speak to the importance of attending to diversity, equity, and inclusion throughout the career life cycle:

- 1**
Outreach is key
to opening a career pathway.
- 2**
Attitudes and dynamics
in the workplace affect retention of evaluators of color.
- 3**
Demonstrated commitment
to DEI attracts evaluators of color to evaluation firms and clients.
- 4**
Employers
have an active role to play in retaining staff.

Attending to diversity, equity, and inclusion throughout the career life cycle

Philanthropy is increasingly committed to social change, yet many foundations and evaluation firms still have much work to do to address internal issues related to DEI. The norm in many of these organizations is for leadership to be primarily or exclusively white, while people of color are typically in assistant or associate-level positions tasked with collecting data from and interfacing with communities. Conversations with evaluators of color in California shed light on what employers in these fields can do to shift the status quo. Firms' and foundations' opportunities for action go beyond a focus on hiring, covering the full career life cycle, from broadening recruitment efforts, to strongly supporting retention, to making ongoing DEI improvements into the future. Key considerations fall under four main themes:

1 Outreach is key to opening a career pathway.

“I wanted [a career] that was in touch with the community without being a direct service provider.”

The fields of evaluation and philanthropy tend to lack formal career pathways and points of entry from educational institutions. Perhaps because staff are drawn from a range of academic backgrounds and work experience, there is no single standard track that leads to a job in these fields. In this context, many evaluators of color we spoke with initially found out about evaluation and philanthropy jobs through personal networks. As one commented, **“When a friend reached out about evaluation it seemed exciting... I did not know it existed.”**

While the reliance on word of mouth to discover career options in evaluation and philanthropy may not be specific to evaluators of color, it highlights an untapped opportunity for outreach to attract a more diverse workforce. Indeed, reaching out to students and young professionals who have connections to communities of interest makes sense for both the organization and the job seeker. Many evaluators of color shared that they were attracted to the field specifically as a way to stay connected with or meaningfully give back to communities through continued learning and influencing strategies for change. They were keenly aware of philanthropy's power to impact communities and the unique opportunity that evaluators have to influence strategies and solutions. One participant shared the appeal of the field, saying, **“Philanthropy has a lot of power... It's this broader ecosystem that can effect change and provide things for the community that the government isn't able to.”** By raising awareness of these career paths, consultancies and foundations can attract more diverse staff who bring a personal passion for their missions.



2 Attitudes and dynamics in the workplace affect retention of evaluators of color.

“It’s exhausting. The DEI work is always placed on people of color to represent communities and have these conversations. It’s challenging.”

To create an inclusive workplace, leaders and staff of foundations and evaluation firms must reckon with longstanding white-dominant expectations that can relegate staff of color to experiences of tokenism and imposter syndrome (feelings of inadequacy despite high achievement). For people of color, this burden can be constant and exhausting, pushing them to leave the field, particularly if colleagues and leadership do not recognize the problem. Instead of expecting staff of color to conform to the dominant culture, organizations need to understand that successful diversification of staff and leaders necessitates a shift in culture.

Specifically, many evaluators of color we spoke with felt unable to present as their full selves in professional settings. Some mentioned difficulties developing confidence and feeling the need to code switch or assimilate with a dominant culture that, for example, assumes ease with certain cultural references and terminology. **“It’s taken me awhile to feel more confident,”** remarked one, speaking of experiencing **“the very common imposter syndrome [from] being the first to go to college and higher education, and [struggling] to really believe in myself and my ability and my value.”** Another explained the dynamics that led them to conform to white work culture, saying, **“If there’s one thing that I’ve learned, it’s that white men are very fragile, and that person is paying me to have a conversation.”**

Evaluators of color also notice that the burden of addressing DEI issues is often placed on them. One participant observed that evaluators of color are often unfairly expected to represent whole communities of color in their work with funders. Another pointed out that many organizations pay attention to issues related to DEI only in isolated circumstances, for example, when it is raised in a meeting or when hiring a person of color. Then, too often, as a participant noted, **“They can hire a person of color and be like, ‘Okay, I’m good. You can take care of it.’”**

Raising awareness of these issues among all staff is an important first step. Employers can build openness to cultural understanding and change by using inclusive language and creating opportunities for staff discussion and internal learning. By collaborating organization-wide to generate and implement ideas for change—as well as drawing on a growing literature for guidance—the process of improving DEI can itself be more equitable.

Common Challenges on the Path of an Evaluator of Color



3

Demonstrated commitment to DEI attracts evaluators of color to evaluation firms and clients.

“Oftentimes funders want perspectives from evaluators of color when it involves research for those communities. But that’s just tokenism.”

A commitment to DEI must go beyond the token appearance of diversity. Focusing on hiring people of color without thoughtfully matching the range of experience of the team with what will enrich the work ignores the value of a diverse team and the individuals that comprise it. Evaluators of color cited examples of being tapped to join an evaluation team when philanthropic clients considered demographics, yet not feeling meaningfully included in the subsequent work. Some also spoke of being pigeonholed into doing research only with communities of color rather than a range of stakeholders from different backgrounds.

People of color consider potential employers and clients in part by assessing their commitment to diversity, equity, and inclusion. **Evaluators we spoke with identified signals of DEI commitment that help them gauge where clients and projects stood regarding diversity, equity, and inclusion:**

Signal of DEI commitment:

Equity-centered initiatives and evaluation practices, reflected in mission statements and organizational descriptions as well as a commitment to community input and participation.

“If your end goal in evaluation is to help promote social or racial justice... you need to be in touch with the community to figure out how you can help them — or if they want your help.”

Signal of DEI commitment:

Practices and policies that promote diversity and inclusion, including in leadership positions and regarding race, sexual orientation, and gender expression.

“Diverse staff is an indicator, but also, is there diversity in leadership power and in decision-making processes?”

Signal of DEI commitment:

Open reflection on race, power, and privilege, including self-reflection, curiosity, and openness to trying new approaches. A willingness to name racism instead of resorting to euphemisms.

“I would want to see some self-awareness and capacity to be uncomfortable sometimes.”



4

Employers have an active role to play in retaining staff.

“Evaluation firms are the ones that are front and center. A lot of evaluation firms are led by white women or men. We as people of color work for them.”

When organizations have difficulty retaining staff of color, they often perceive the person of color as the problem, not the ecosystem that reinforces inequities. Persistent challenges with retention should signal a need for the organization to make changes. Instead, as one focus group participant characterized it, **“The narrative... is that consulting is cutthroat and competitive: You can either do it or you can’t; you either have the skills or you don’t. The narrative hasn’t been, ‘We suck at keeping people of color.’”** In other words, employers who commit to diversifying their staff need to take the perspective that it is the organization’s job to actively support staff success and inclusion.

One opportunity lies in training and mentorship. Upon entering the field of philanthropic evaluation, evaluators discover gaps in their preparation, notably with regard to consulting skills and incorporating equity into evaluation. The evaluators of color we spoke with broadly agreed on the need for workplaces to train staff and actively develop skills that go beyond their academic training and technical expertise. Many skills they identified related to consulting, such as facilitating discussions, building consensus across stakeholders, drawing logical inferences and meaning from data, and tailoring communications to multiple audiences.

In addition, evaluators of color emphasized another vital skill set: the ability to raise equity-related issues with philanthropic clients and conduct research with an equity focus. One person pointed out that evaluators are in a position to call attention to community needs that are not being heard by funders. The evaluator questioned, **“As an evaluator, you have power to lift up their voices, but how do you do that when philanthropic institutions have [a different] agenda? You might be leading with equity and empathy, but the conversation [with the funder] might go a different way. How do you address that dissonance between grantees and the funder?”** Elevating these concerns requires tact yet is an indispensable part of giving meaning to community-based research.

A need for field-specific skill building is not unique to evaluators of color. A lack of training for entry-level evaluators, however, is a barrier to job satisfaction and retention, especially when compounded by the structural obstacles that many evaluators of color face upon entering the field. By providing skills training in consulting and equity practices, organizations not only build capacity among their staff, but show that they value the insights and ideas of their team members and prioritize equity.

Skill building topics for evaluators

- How to facilitate discussions and meetings, including connecting the dots for others, and reaching consensus among stakeholders
- How to write for different audiences
- How to go beyond technical data analysis to interpret findings into actions and recommendations
- How to establish rapport
- How to conduct philanthropy-focused research
- How to negotiate client requests that fall outside a scope of work
- How to incorporate equity into research
- How to raise issues of equity with clients



Recommendations for funders and evaluators

Foundations and evaluation firms have strong roles to play in improving the career paths and professional growth opportunities for evaluators of color. They also must work actively to expand the diversity, equity, and inclusion of their workplaces and projects. Funders are in a prime position to lead efforts to prioritize DEI through investments in evaluation capacity building and professional development for staff of color. Evaluation firms, likewise, must take the lead on engaging deeply in internal DEI cultural change and on developing mentorship, peer support, and professional development opportunities that support staff of color.

Recommendation:
Provide mentorship
to evaluators of color.

For: Evaluation Firms

“As I grow as an evaluator, I want to be very intentional about mentoring evaluators of color. I wouldn’t have been able to do this work without help.”

“Mentors don’t have to be folks of color. I have great mentors that are white men.”

Recommendation: Establish peer support groups and networks that address issues of power and equity with colleagues and clients.

For: Evaluation Firms

“An affinity space like this focus group is missing—having the opportunity to talk to like-minded folks about how you are feeling personally and professionally, and all the different positions we are put in as an evaluator.”

Recommendation: Intentionally resource and prioritize professional development for staff of color.

For: Funders & Evaluation Firms

“If I was [at a firm] with no opportunities for growth (you don’t want to send me to a conference, you don’t want to send me to a workshop, but you want to tokenize me as your black worker?) then why would I want to stay here?”

Recommendation: Resource and build capacity of evaluation firms to engage in deep DEI work internally.

For: Funders & Evaluation Firms

“If you are a funder and you are asking people for their [diversity] numbers and strategies, can you tack on additional funds to support internal work?”

Recommendation: Invest in building local evaluation capacity within communities of color, perhaps in partnership with universities to provide support or structure.

For: Funders

“Foundations consult with other people who are not in the region, but there’s an opportunity to invest and build capacity here.”

Turning hopes into realities

Making the future more diverse, inclusive, and equitable means having deeper conversations that center the insights, ideas, and lived experiences of professionals of color. This brief is a starting point, raising issues and ideas that deserve continued thoughtful discussion and similar engagement with evaluators in other state contexts. The recommendations generated by these evaluators of color who generously shared their insights will require a committed undertaking at evaluation firms, at foundations, and elsewhere—a necessary and rewarding effort. When we embody the progress we hope to see in our communities, our organizations will undoubtedly be better able to advance positive social change.

“Evaluators of color have the skillset to contribute and they also have lived experience that you have to value. There needs to be a shift [to] valuing it truthfully.”

About the voices in this learning brief

The quotes and ideas presented in this brief emerged from conversations with California-based evaluators of color during the Summer and Fall of 2019. With the support of the James Irvine Foundation, Engage R+D facilitated three conversations with a total of 16 participants who identify as emerging to mid-level evaluators of color working with philanthropy (Bay Area = 10; Central Valley = 2; Los Angeles = 4). We identified participants through our organizations’ networks, through outreach to other foundations, and through the American Evaluation Association’s website and other lists. The majority of participants had less than 10 years of evaluation experience and worked for small- to mid-sized evaluation consulting firms. Some participants were independent consultants or affiliated with a university. Eleven of the participants took part in an additional follow-up discussion of the themes that emerged from the original conversations to reflect on implications and recommendations. Though data collection happened prior to COVID-19, the issues raised in this brief are brought into even greater relief by how the crisis is impacting communities of color.



Engage R+D partners with foundations, nonprofits, and public agencies to help design, implement, measure, and improve their work. We are data and evaluation experts, grounded in community and social sector strategy, and strongly committed to diversity, equity, and inclusion. The firm’s founding was inspired by the belief that creating social change requires bringing together meaningful data, community voice, and field insights in creative ways to inform strategy and drive results. We also exchange ideas and share insights with the broader field, so that together we can create a healthier and more equitable future.

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Foundation

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