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

Nonprofits deliver a sizable chunk of social services in this country; they are at the frontline of efforts to reduce persistent disparities in education, employment, health, and other outcomes of well-being that are too often based on income, race, and geography. Given its role in addressing the widening inequalities in our communities, it is only natural that there has been an increasing focus on addressing issues of Diversity, Equity, and Inclusion (DEI) in the nonprofit sector. There is growing evidence that organizations that are representative of their communities and that include voices of frontline staff, beneficiaries, and community partners in their decision-making are more effective. There is also growing recognition that it is important to bring a DEI lens not just to how nonprofits operate their organizations and programs, but also to how they generate evidence, and measure and evaluate outcomes.

At Project Evident, we want to empower social sector leaders and practitioners to drive their data and evidence agenda, and help them embed R&D and evaluative practices in their regular operations to continuously generate evidence, innovate, and improve outcomes. We believe that considerations of diversity, equity, and inclusion are key to reaching equitable outcomes, and that all stakeholders in the sector – nonprofits, funders, policymakers and researchers – can strengthen their evidence-building work with a lens towards DEI. In this guide, we discuss how nonprofit leaders can effectively promote and intentionally integrate a diversity, equity, and inclusion framework into their evidence-building practices to help achieve more equitable outcomes.

Defining Diversity, Equity, and Inclusion

We used definitions from Unrealized Impact, a 2016 study of the state of diversity, equity, and inclusion in the education sector, for the purposes of this framework. Organizations can adapt these and define these terms for their own context.

- **DIVERSITY**: The presence of different types of people
- **EQUITY**: The process of ensuring equally high outcomes for all and removing the predictability of success or failure that currently correlates with any social, [economic] or cultural factor
- **INCLUSION**: The process of putting diversity into action by creating an environment of involvement, respect and connection

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1 Hunt, Vivian; Layton, Dennis; and Prince, Sara. 2014. “Diversity Matters.” Legal Profession. 2.
A DEI Framework for Practitioner-Led Evidence Building

Project Evident believes there are foundational activities necessary for evidence building. These activities, when combined with continuous review and feedback from key stakeholders and beneficiaries, support program evolution and increased impact. Social sector leaders and practitioners can integrate DEI considerations in how they:

While the framework presented in this paper does not address an organization’s overall approach to data and evidence or DEI, it is designed for organizations that are actively working to improve in both areas and want to start advancing an evidence strategy with a DEI lens for stronger, more equitable outcomes.

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<tr>
<th>Evidence Activity</th>
<th>DEI Practices</th>
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<td>Fostering a learning culture</td>
<td>• Build organizational capacity and practices for continuous dialogue, reflection and other learning activities among staff at all levels of the organization, including front line staff. Enable communication and collaboration across staff at different levels to prevent silos that foster unequal access to knowledge, learning and decision-making. All staff can learn from and act on evidence to improve outcomes.</td>
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<td>• Systematically engage frontline staff, community members and partners, and program beneficiaries to surface lessons and insights for improvement, as well as areas of further learning and evidence building. Programs and strategies that do not reflect community and beneficiary needs can be frustrating to implement for those not involved in developing them, and are not likely to change outcomes. It is critical to intentionally lift up the voices of those that have been traditionally more disenfranchised (like people of color), the communities being served, and the practitioners to reduce the impact of traditional power dynamics on how an organization learns and makes decisions. Sustained commitment to the value and practice of diversity, equity, and inclusion from organizational leadership is critical here.</td>
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Discuss and demonstrate how staff, beneficiary and community feedback shape innovations, improvements and evidence building. If people feel that their voices are valued and respected by organizational leadership and that they can have an impact on how their organization operates based on their work, they are more likely to apply a learning lens to their work, share knowledge, and engage in data collection and use – all of which are important in delivering outcomes.

**Theory of Change**

An organization’s outcome measurement strategy should be grounded in its theory of change – a set of facts and hypotheses about how its activities are expected to address problems in a community and change outcomes.

- Ensure that your theory of change and measurement strategy are informed by the needs and voices of beneficiaries, community members, and staff with lived experiences similar to those you serve. A theory of change outlines the mechanisms of change, as well as the assumptions and context that support or challenge the theory from materializing into outcomes. Engage community members and partners, as well as beneficiaries and staff who share their backgrounds, to conduct a clear analysis of the problems your organization exists to address and to outline change mechanisms that are rooted in what people need and how they behave. Ensure that target outcomes reflect community and beneficiary priorities. And that assumptions underlying the theory of change are shared with them. Be willing to adjust the theory of change based on these critical voices.

- Consider systemic drivers of inequities. We recognize that organizations cannot always address structural issues that affect different groups, but it’s important to understand the ways in which they have historically shaped the problems faced by different groups and how they may lead to differential outcomes in order to design equitable programs and benchmarks. Consider differential paths in the theory of change for different groups/individual characteristics. In addition, review the representativeness of the research used to support the theory of change.

- Consider unintended consequences. Organizations should consider how their activities and outcomes may lead to unintended effects that may affect their beneficiaries or communities positively or negatively (for example, loss of
public benefits due to increase in earned income that ultimately leads to loss of income for beneficiaries of an employment program), and define outcomes and measurement strategies accordingly.

- **Align board, staff and beneficiaries on theory of change and outcome measures.** It is very common to find that staff across an organization have different ideas about why they are doing certain activities, who they should be serving, and to what end – all of which can hinder efforts to deliver outcomes and build evidence. Reflecting on a theory of change frequently and systematically should be part of the learning processes described in the last section. Those in leadership positions should keep an open mind and actively engage with questions that challenge current thinking and surface areas of improvement.

### Data Collection and Analysis

Data collection should be meaningfully related to an organization’s theory of change. Data should be reported and examined regularly, and should be actively used to test program assumptions and innovations to validate their effectiveness and to develop evidence of beneficiary outcomes.

- **Develop data collection tools and processes that are respectful and responsive to the needs of different groups.**
  
  For example, when designing data collection instruments and implementation strategies, make sure that questions are equally accessible and appropriate (and not threatening); provide context and transparency (does a beneficiary know why a question is being asked of them?); ensure that groups see themselves represented (for example, having non-binary gender options and multiple racial and ethnic categories); and assist with translation when necessary. When using standardized instruments or assessments, consider whether they have been tested and validated with different groups.

- **Collect disaggregated data to ensure you understand participation and outcomes by different groups and address disparities,** including race, ethnicity, gender, income level, among others. Aggregated data can hide the variation of experiences among different groups. Check for potential bias in data sets and learning/research questions. In efforts to disaggregate data, it’s important to take measures to keep data secure and confidential, and to offer beneficiaries choices on reporting data (for example, offering options to not answer questions about disability or sexual orientation...
unless they are relevant for program delivery or funding).  

- Engage staff at all levels, as well as beneficiaries, in the development of data collection protocols, instruments, analysis plans and evaluation efforts. As previously discussed, this is the best way to build a high-quality continuous improvement practice and to reduce potential effects of unintentional bias in designing data collection plans, evaluations, or statistical models (what variables to use, how to approach interpretations, etc.). For example, data collection instruments can be tested with beneficiaries or community members for cultural appropriateness before implementation on a larger scale. It’s especially important to gather direct service staff and beneficiary feedback when developing and testing innovations, and when interpreting findings. For example, if there’s a difference in program participation by race, what are the hypotheses about the underlying cause? Beneficiaries and community members (and often direct service staff) can leverage their lived experience to provide important contextual understanding for patterns that show up in quantitative data, and their role in interpretation of findings can be critical.

**Share data and evidence**

Sharing and discussing data routinely and in user-friendly formats with internal and external stakeholders can help drive data-driven decision-making, and potentially empower and engage community members and partners in driving solutions.

- Develop dashboards, reports, and learning forums to help frontline staff engage with data and extract lessons that inform their work. Data literacy varies widely across organizations, and developing visualizations and reports that make data user-friendly and easily accessible can help staff at all levels and from all backgrounds engage with data and derive value from them. This is also important to foster an inclusive learning culture.

- Design dissemination products – print publications, web presentations, video, audio, etc. – that are accessible to diverse audiences and culturally responsive to the communities they involve. For example, images and videos

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4 When looking at data like this, it should not be reported for cell sizes smaller than 10, so as to protect the identity of people of color and other groups that tend to represent small numbers of individuals within organizations.

5 It is equally important to consider other sources of data, including service reach, participation, and implementation.
Many of the recommendations in this framework should be considered general best practices for continuous evidence building and program improvement. For example, building the capacity of frontline staff to systematically engage in learning forums and evaluation planning will strengthen the foundation of evidence generation at an organization. It is also an inclusive practice and can bring diverse viewpoints in the evidence generation process, as frontline staff in nonprofit organizations tend to be more diverse and representative of the communities served when compared to senior leadership.

As noted above, this framework is not designed to address an organization’s overall approach to DEI or evidence building in a comprehensive way; it strives to help nonprofits look at best practices for evidence building with a DEI lens. Funders and researchers can also use many of these practices to incorporate a DEI focus in their evidence building work with nonprofits.

Below, we provide a few resources that have helped us shape this framework and that can offer organizations with additional guidance for this work.

- **Evidence Building and Evaluation with DEI focus:**
  - [Child Trends: How to Embed a Racial and Ethnic Equity Perspective in Research: Practical Guidance for the Research Process](#)
  - [Fund for Shared Insights: Stories on Advancing EDI using Feedback Loops](#)
  - [FSG: Four Ways to Incorporate a Gender Lens in your Measurement & Evaluation Efforts](#)
  - [Equitable Evaluation Initiative](#)
  - [Unicef-Evaluation for Equitable Development Results](#)

- **Integrating DEI into other aspects of your work**
  - [Meyers Diversity, Equity, and Inclusion Spectrum Tool](#)
  - [Understanding and Using a Racial Equity Tool](#)
  - [Chicago Beyond: Why Am I Always Being Researched](#)
  - [Survey Monkey-Paradigm: Belonging and Inclusion Template](#)
  - [Race Forward](#)