EQUITABLE EVALUATION LEARNING CLUB

WHAT WE DID AND LEARNED
December 2018
As part of the Equitable Evaluation Design Sessions (hosted by the Colorado Evaluation Network, sponsored by the Colorado Health Foundation and the Colorado Trust, and facilitated by Jara Dean-Coffey), Vantage Evaluation took on two design challenges:

1. How can we build personal awareness of inequities and examine the professional implications of these inequities in our evaluation work?
2. How can we expand the definition of validity in evaluation used by nonprofits and foundations in our community?

In this summary, we will focus on the first design challenge: why Vantage Evaluation decided to focus on personal equity awareness, what we did, what we learned, and where we are going next. Our hope in sharing our experiences is that others might find inspiration to engage in similar work, and that those organizations will take what we did and improve upon it. The second design challenge, related to validity, is the topic of a separate summary.

**WHY THIS IS IMPORTANT FOR THE FIELD**

Our decision to focus on building personal awareness of inequities and examining the professional implications of these inequities emerged from an understanding of the intersection of personal and professional spheres.

- Evaluation does not happen in a bubble. It is impacted by the social context around us and to do it well, evaluation requires an understanding of the forces that shape our world, including structural racism and implicit bias. On the flipside, evaluation impacts the social context around us, so it requires recognition of the ways in which our work perpetuates the forces that shape our world, including structural racism and implicit bias.
- Evaluator competencies recognize that self-awareness is interwoven with effective evaluation practice. The field emphasizes skills like reflective practice, situational analysis, and interpersonal competence that require a degree of understanding of how inequities affect individual evaluators.

It is tempting to focus on only the professional side: how can organizations work to dismantle inequities? However, organizations are just collections of individuals. We have to address both sides: our personal relationship with inequities and the ways in which racism and equity impact our professional work. Without both, we cannot work effectively support our clients and the community.

**ALIGNMENT WITH VANTAGE PRIORITIES**

Our professional context also provided a ripe setting for this experiment: First, exploring equity aligned with our core values. While equity is not an explicit core value, prioritizing equitable evaluation efforts wove clearly into four of our seven core values (and arguably into all seven):

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<thead>
<tr>
<th>Vantage core values with a clear connection to equity</th>
<th>Vantage core values with an arguable connection to equity</th>
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<tr>
<td><strong>See the big picture:</strong> These issues affect the world around us and thus we cannot avoid engagement with them. We must increase our understanding of equity, because in not doing so, our evaluative</td>
<td><strong>Embrace your zeal:</strong> Some members of our team are deeply passionate about social justice and racial equity. This design challenge presented an opportunity for</td>
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efforts are not as valid and reliable as they need to be to do our work well.

- **Be a whole person:** These issues affect each of us personally and thus affect our relationships with one another and our work.
- **Strive to improve:** This is a new area for us and the field. The goal is not to answer all questions and come up with perfect solutions. The goal is baby steps.
- **Prioritize contribution:** This is not a listen and observe activity. Everyone has something to contribute to these conversations and should.

Second, the existing culture and dynamics of our team created an environment where this design challenge could succeed. As all work is contextual, here are a few contextual details about Vantage before we dive further into what we did as part of this design challenge. At the time of this work, Vantage was…

- A seven-person evaluation firm, plus two summer interns
- All female
- Predominantly but not exclusively white
- Young, with all employees under the age of 40
- In Denver, Colorado
- A self-managed team, where decisions are made by the team, not by the firm’s leadership
- A fast-moving, ever-changing organization comfortable with the messy middle, as well as ongoing learning and adaptation
- Committed to regular formal and informal reflective practices

**WHAT WE SET OUT TO DO**

We planned an optional learning club for the Vantage Evaluation team and summer interns to explore their personal relationship with inequities and the implications in their professional work. (All nine team members opted in.) The goals for the learning club were:

1. Build personal awareness of inequities and the professional implications of inequities in evaluation.
2. Identify small ways Vantage can shift our work to avoid perpetuating inequities.
3. Test ways to use readings and conversations inside an evaluation firm to achieve goals one and two (contribute to the field).

The expectation was that team members would spend 90 minutes to two hours preparing for each of the three monthly sessions, and we recognized that this may not be enough time to get through everything. Before each session, team members were also asked to fill out a reflection form on the process and mindset shifts.

The Learning Club sessions were designed to build off of one another. We wanted to spend the first two sessions focused on the “problem” before jumping to what we can do about it. The only way that we can develop strategies to combat inequities is by understanding the problem, context, and our relationship to
inequities, rather than jumping straight into solutions. We had to understand implicit bias and structural racism before we could discuss how racism and evaluation intersect. We also had to talk about how racism and evaluation intersect before we could develop ways that Vantage can work to combat any of those inequities.

<table>
<thead>
<tr>
<th>Month/Topic</th>
<th>Readings</th>
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| July 2018: Exploring the privilege and bias of the dominant culture¹ | Structural Racism:  
- Equity Summit Closing Video, Policy Link, 2018  
- John A. Powell, Part One and Part Two, Momentum Conference, 2009  
- Plus one or more articles from: Structural Racism, Poverty and Race, a Journal of the Poverty & Race Action Council, 2006  
Implicit Bias:  
- Guide on Implicit Bias, Center for Social Inclusion, 2013  
- And one or more of the following:  
  - Transforming Perception: Black Men and Boys, American Values Institute, 2014  
  - Telling Our Own Story: The Role of Narrative in Racial Healing, The Kellogg Foundation, 2013  
  - Unconscious Bias at Work, Google, 2014 |
| August 2018: The intersection of racism and evaluation | How Do We Know When We See It? Critical Issues Forum, 3 - Leiderman, S., 2010  
- Evaluation to Accelerate Progress Towards Equity, Social Justice, and Human Rights, In Evaluation for Equitable Development Results (Part 1 Evaluation and Equity); Segone, M., 2012  
- Principles Focused Evaluation and Racial Equity, Chris Corrigan, June 4, 2018 |
- The Annie E. Casey Foundation’s EE Journey to Date, Equitable Evaluation Blog, 2018 |

During the sessions, we spent the first 10-15 minutes together as a large group to review the purpose of the Learning Club, the ground rules for the conversations, any lingering questions or concerns from the previous section, and the goal of the current session.

¹ We initially had the third topic of white privilege planned for the first session. However, after receiving feedback from Jara Dean-Coffey, we decided to focus on implicit bias and structural racism. Based on her feedback, we realized that white privilege intrinsically linked to implicit bias and structural racism. By focusing our understanding on implicit bias and structural racism, we can understand why white privilege has become the dominant culture in our society. This recommendation served us well, and white privilege emerged in the conversation as a natural byproduct of implicit bias and structural racism.
Then, we split into two groups for the focused conversation. Team members stayed in the same small groups for the entirety of the Learning Club. As a team of nine, we were too large to have meaningful conversations about inequities as an entire team. We decided to keep the groups the same for the entire time, to build safety with one another, build upon the conversations in each session, and to bring new hires up to speed.

The last session (September) was three hours. For the first two hours, we held discussions with our small groups on how to adapt evaluation for combating inequities, and developed proposed action items for Vantage. During the last hour, we came together as a large group to share our proposed action items, vote on the action items we wanted to move forward with, and reflect on the experience.

**HOW DID IT GO?**

**BUILD PERSONAL AWARENESS OF INEQUITIES AND THE PROFESSIONAL IMPLICATIONS OF INEQUITIES IN EVALUATION**

We had full participation from all team members and interns in our optional professional development during an exceptionally busy time period, and all team members reported that it was a good use of their time. All team members and interns completed readings and reflections, and actively participated in the conversations.

Team members came from very different places in their understanding of equity, and had different past experiences. As a result, what team members got out of the Learning Club varied. For team members with less background in these topics, the perspective shift was slanted toward increasing personal awareness. For team members with a deeper background, the Learning Club advanced to professional implications.

**IDENTIFY SMALL WAYS VANTAGE CAN SHIFT OUR WORK TO AVOID PERPETUATING INEQUITIES**

Through the Learning Club, we were able to smoothly transition into developing action items for incorporating an equity lens into our work. Our initial goal with the Learning Club was to develop ways that Vantage can avoid perpetuating inequities in our work. All of the action items developed do meet the goal, and some go beyond that goal to reducing inequities through our work. We were skeptical whether we would accomplish this goal, given the feeling of hopelessness many of us left the first sessions with. And yet, when it came time to transition to solutions, action items came naturally. There was a mix between internal and external focused action items. The team was excited about the action items we landed on, and are eager to continue this work (the action items we will be pursuing are listed on page 7).

This process reaffirmed that while Vantage is not exclusively positioned to use evaluation as a tool to pursue equity, equity is core to many of our values and evident in the way that we do our work. The

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2 Why not, you ask? Two reasons: First, we've put a stake in the ground to transform how purpose-driven organizations think about and use evaluation. While equity certainly fits under that umbrella, to focus exclusively on equity would eliminate the other efforts we care deeply about. Second, there are other evaluators who specialize in using evaluation to dismantle inequities, who have dedicated their life to that approach, and who have far deeper expertise in this area than we have developed. We will continue to engage in work with an equity lens, and learn how to do so better over time, but if the project emphasizes evaluation as a tool to break down inequity and racism, these groups are far better suited that we.
action items developed through the Learning Club do not feel like a complete course correction, but
instead add intentionality to how we show up in the world and think about the ways equity and evaluation
intersect.

TEST WAYS TO USE READINGS AND CONVERSATIONS INSIDE AN EVALUATION FIRM TO
ACHIEVE THE FIRST TWO GOALS

We tested and learned a lot about what worked and what did not for Vantage. We did a lot of thinking at
the beginning of the process about how the Learning Club would fit into our organizational culture, so our
culture is an integral part of the model that we used. If it were to be replicated elsewhere, it would need to
be adapted to the culture and circumstances of that organization.

If we were to do the Learning Club again, we would alter the structure and reading slightly. If possible, we
would add more sessions: one each on implicit bias and structural racism (rather than combined in one
session), and two on action planning. Readings would be altered based on the feedback offered below.\(^3\)

<table>
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<tr>
<th>Month</th>
<th>Reading Feedback</th>
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<tr>
<td>July 2018</td>
<td>The most useful readings identified by team members and observed through discussions were the 2-part video of John A. Powell at the Momentum Conference and the Guide on Implicit Bias from the Center for Social Inclusion. Team members would frequently reference the idea of the “opportunity escalator” raised in the Momentum Conference videos. Other useful readings included the Structural Racism issue of Poverty and Race and the Unconscious Bias at Work video from Google. The article “Telling Our Own Story: The Role of Narrative in Racial Healing” also particularly resonated with some team members. The Equity Summit Closing Session video was the least useful for team members.</td>
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<tr>
<td>August 2018</td>
<td>We struggled to find readings that stayed focused on how racism intersects with evaluation. Instead, the readings moved on to how to make sure that racism and inequity does not enter your evaluation practice. As a result, the readings for this session were not as valuable as the other two sessions.</td>
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<tr>
<td>September 2018</td>
<td>The most useful readings identified by team members and observed through discussions was “Embracing Equity: 7 Steps to Advance and Embed Race Equality and Inclusion Within Your Organization from the Annie E. Casey Foundation.” Team members also drew on the August readings for this conversation, and some of those might be more appropriate for this session.</td>
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Team members also suggested incorporating other types of materials, such as podcasts, movies, etc.

We were also successful at facilitating the Learning Club internally, rather than contracting with an external facilitator/consultant.

\(^3\) At this point, we are not providing a revised reading list. Rather, our hope is that another organization or group will take this feedback and improve upon what we did.
WHAT FACILITATED OUR SUCCESS?

DESIGN COMPONENTS

Several factors of the Learning Club design facilitated its success:

- The set up of the sessions, including (1) having topics that built off of one another, (2) being able to sit with topics for a dedicated time rather than jumping to solutions, (3) pushing back on jumping to action items allowed for the action items to come naturally once it was time, and (4) focusing on structural racism and implicit bias rather than white privilege.
- Having a month in between sessions felt like enough time to digest what we were discussing and not feel burdened, but short enough of time that we did not forget too much in between sessions.
- Using small groups. We were too big to facilitate as one group. Maintaining the same groups each time helped with continuity between sessions, however, there was an appetite from the team for more sharing between groups.
- Using readings, while not perfect, grounded the conversation and generated a balance between personal experience and shared content. These readings gave all team members a common starting point, no matter their background or experience with equity work.
- The Learning Club was designed so that all team members could participate, including the CEO, rather than a committee of team members that then made recommendations to leadership.

COMPANY COMPONENTS

In addition to the intentionality of the learning club design, we identified some pre-existing characteristics of Vantage that facilitated the success of this effort.

- Pre-dating this work, Vantage had built a strong and cohesive team. The level of existing authentic comfort with colleagues was crucial to the success of this effort.
- Our Equitable Evaluation design challenges were endorsed and promoted as a core part of our work. The connection to our company values (described above) justified team participation. We do not believe that this effort would have worked as well with only part of the team participating.
- Not only did we pay lip service to the connection of this work to our values, but it actually is connected to our values. Our team regularly discusses how our core values impact our work and take a true learning and improving approach to everything we do. Thus when something hard, new, and undeveloped came along, our existing norms of behavior facilitated deep engagement with the design challenge.
- Our flat organizational structure and self-managed team meant that team members knew that if they recommended an action item, and there was appetite from peers to make it happen, it would happen. At no time did the Learning Club feel like a theoretical exercise, but was always connected with the real possibility of action.
- We are constantly trying things out and seeing how they go. No one at Vantage expects fully baked projects, and everyone is comfortable in the uncertainty of this work.

WHAT COMES NEXT

Vantage will undertake “Equitable Evaluation 2.0,” putting into motion the action items developed during the third Learning Club session:

vantage-eval.com
### Internally-Focused

#### Organizational Practices
- Conduct Institutional Policy Review and implement recommendations
- Implement company tipping policy
- Develop a vendor policy and list of preferred vendors
- Use of images in our branding

#### Team-Focused
- Create equity module for new team members
- Ongoing team-based equity conversations

### Externally-Focused

- Disseminate our learnings from this experiment in hopes that the field will build upon it
- Create considerations for equity in project process
- Continue validity experimentation (see other Equitable Evaluation summary)

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**NOW IT’S YOUR TURN**

We tried this at Vantage—now it’s your turn! Take what we did and our lessons learned, then adapt the Learning Club for your organization or group. We’re happy to help you think through how you might adapt this Learning Club for your context!

**Next, let us know how it went!** *What did you change? How did your team react? How did your sessions go? What next steps did you generate?*

Don’t forget to connect with the Equitable Evaluation community or on social media using #EquitableEval.

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**Good Luck!!**

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