



Evolving Evaluation Summary



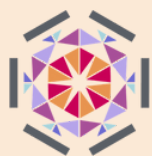
2021
2022



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Description of Evolving Evaluation

Evolving Evaluation: Journeys with Culturally Responsive and Equitable Evaluation was a short-term research project collecting data from January 2021 through December 2022. This research was part of Expanding the Bench® (ETB), an initiative supporting diverse evaluators and funders of evaluation to value, practice, and promote a culturally responsive and equitable evaluation (CREE) ecosystem. Historically, the fields of research and evaluation have excluded and, at times, exploited the voices of historically marginalized and under-supported communities. CREE incorporates cultural, structural, and contextual factors (e.g., historical, social, economic, racial, ethnic, gender) using a participatory process that shifts power to individuals most impacted. Context and systemic barriers have not always been taken into consideration in evaluation design. To ensure these voices and contexts are included, ETB promotes CREE, which requires the integration of justice, equity, diversity, inclusion, and engagement in all phases of evaluation. This research project engaged evaluators in critical reflections of their own journeys, stories, and experiences with evaluation. The purpose was to:

- Document trends in the evolution of practitioners' evaluation approach and practice.
- Gather examples of practitioners' CREE practice, particularly during COVID-19.
- Identify changes that are needed in the evaluation ecosystem to support more equitable practices.

This summary, authored by Sandra Silva, includes the primary findings that emerged from this research. Also, findings that have been disseminated through several American Evaluation Association (AEA) conference presentations.



METHODOLOGY AND ANALYSIS

The ETB Team began outreach for this research study early in 2021 and included the following steps:

- **Step 1:** Submitted interest form
- **Step 2:** Consented to research study
- **Step 3:** Paired with a colleague for research discussion
- **Step 4:** Paired colleagues record discussion
- **Step 5:** Submitted recorded conversation

During the recruitment period, 163 individuals responded to these outreach efforts by submitting an interest form to the ETB Team. After completing their consent form, they were asked to engage a colleague in conversation about their evaluation journey and experience with CREE. For those that did not have a specific colleague in mind, they were matched with another individual that signed up for the research project. For those participants reaching step 4, they were provided with a set of questions to guide their conversation (Appendix A) and were instructed to record the conversation using a platform, such as Zoom, and then submit this recording to the ETB Team. Conversations typically lasted approximately 60-90 minutes. Participants were offered an honorarium in the form of a \$50 gift card. Additional demographic data was collected using Google Forms.

Recorded conversations were transcribed and de-identified prior to analysis. Transcripts were cleaned before being imported into Dedoose, the platform used to analyze the data. A deductive approach was used for the analysis, beginning with the development of a codebook aligned with the questions in the guide. The coding process was iterative, and codes were added to reflect additional themes identified during the content analysis. Once coding was completed by members of the ETB Team, sensemaking sessions were held with a small group of research participants that expressed interest in being more involved in this research effort.



DESCRIPTION OF PARTICIPANTS

In total, 28 individuals participated in Evolving Evaluation resulting in 14 recorded conversations that were analyzed. On average, participants reported having 13.5 years of evaluation experience with almost half (46%) representing multiple sectors. Most commonly, they worked as independent evaluators (40%); for-profit organizations (32%); and non-profit organizations (29%). Of those participants that provided demographic information, they were overwhelmingly female (77%) compared to male (23%). In terms of race/ethnicity, the largest groups represented were Black (27%) or Latinx (27%) as shown in Figure 1.

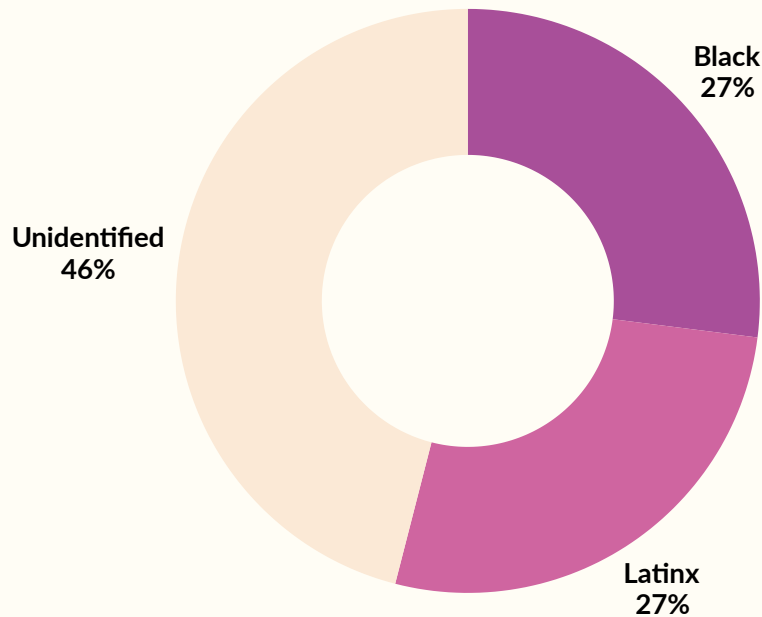
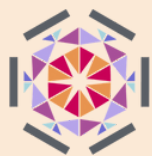


Figure 1. Participants by Race/Ethnicity

Participants that provided permission to acknowledge their contribution are listed in Appendix B. Also noted, are a smaller group of participants who contributed to the sense-making process and/or served as presenters at the AEA conferences.



Findings

This summary outlines the key findings presented by the following topic areas: relationship-building; lived experience; evaluator roles; evolution of practice; evaluation challenges; and organizational equity work.

Topic Areas	Key Findings
Relationship Building	Finding 1: Connecting with other evaluators of color (e.g., affinity groups, mentorships, trainings) has been an important source of support.
	Finding 2: Being in relationship with community, in a way that breaks down power dynamics and acknowledges past harm, is critical to their evaluation work.
Lived Experience	Finding 3: Evaluators integrated their lived experiences reflecting on how their intersecting identities influenced their evaluation work.
Evaluator Roles	Finding 4: Evaluators described the multiple roles they serve—from facilitator, thought partner, capacity builder, policy maker, to social justice advocate, and change agent.
Evolution of Practice	Finding 5: For evaluation practice to advance, evaluators have had to unlearn what they were taught and dismantle early evaluation teachings around concepts of objectivity, validity, and rigor.
	Finding 6: With more evaluation experience, comes the acknowledgement that expertise must be balanced with a learning orientation.
Evaluation Challenges	Finding 7: In spaces aligned with white supremacy, racially and/or ethnically diverse evaluators endure additional challenges such as microaggressions and performative DEI.
Organizational Equity Work	Finding 8: Resistance and healing are essential for those advancing CREE.

RELATIONSHIP-BUILDING

Finding

1

Connecting with other evaluators of color (e.g., affinity groups, mentorships, trainings) has been an important source of support.

Having a community of evaluators, like affinity groups, with similar lived experiences (i.e., BIPOC, LGBTQ, women) has been an important source of support, especially when encountering racism or microaggressions. Evaluators are also connecting and collaborating to share best practices and expand their skillset through learning and networking opportunities. Participating in training programs focused on centering equity in evaluation work (AEA Graduate Education Diversity Internship, Leaders in Equitable Evaluation and Diversity Program) has created community and lessened isolation. Participants shared that they have appreciated learning from and leaning on a community of evaluators of color also undertaking DEI work.

“Because sometimes when you're fighting the fight and trying to explain the importance of this concept of CREE to folks who might not be familiar with the field, I found...I'm not alone, there's a community out there fighting the same fight. And no matter how frustrated I get in this conversation, I can go back to that community. And just if I need to cry, if I need to vent, whatever it is, that will be a space available for me to do that. And I think that has really helped with getting through some of those challenges.”

~ Evolving Evaluation Participant

Not that long ago when a woman I know put together an evaluators of color group, and it was the first time in 18 years that I had been in a room with other evaluators of color. It was incredible. It was validating to hear all the different kinds of experiences that people had. [...] I feel like it's been a healing journey and also painful.”

~ Evolving Evaluation Participant

Finding 2

Being in relationship with community in a way that breaks down power dynamics and acknowledges past harm, is critical to their evaluation work.

Beyond the relationships with their peers and colleagues, participants also valued developing meaningful relationships with communities and community members through their evaluation work. This was viewed as building trust through transparency and power-sharing. Being in relationship with community was also described as reducing barriers to participation, creating an inclusive process in the evaluation work, and centering community stories. This included being aware of power dynamics and past research and evaluation experiences that exploited communities and community members. In community work, acknowledging the history of harm was identified as being part of a CREE approach, which could involve reconciling this exploitative history. A community-centered CREE approach was also one that shifted more power to community and intentionally reduced inequitable power dynamics, where evaluators have often been viewed as gatekeepers and holders of power.

"I think it needs to be acknowledged. One of the ways I approach this is by saying research and evaluation have been so extractive in the past, and it's time to own our narratives and take charge of our narratives. I think as communities of color and communities with marginalized identities, we have rich histories of storytelling and meaning-making, and are really well-positioned to use our voices for this."

~ Evolving Evaluation Participant

"I think really attending to the gatekeeping that happens in evaluation. I know I've held up those gate-keeping practices and I think that's very common. It's maintaining status, in white dominant culture, especially in the field of evaluation, which is dominated by white women."

~ Evolving Evaluation Participant

LIVED EXPERIENCE

Finding 3

Evaluators integrated their lived experiences reflecting on how their intersecting identities influenced their evaluation work.

Participants identifying as a person of Indigenous, Black, Latinx, Asian, or other racially and/or ethnically diverse background brought their lived experience, such as their history with racial oppression, into their evaluation work and felt these experiences translated into using a CREE approach. Even before they were CREE practitioners, participants shared that they integrated an equity lens into their evaluation and research efforts. For participants that did not identify as racially and/or ethnically diverse, they noted that part of their CREE journey has involved reflecting on their identities and acknowledging their privilege in evaluation spaces. Overall, participants emphasized that drawing on their lived experiences allowed them to bring their authentic selves to this work, which was critical to building relationships.

“I was part of the student movement for a really long time and feminist movement and anything and everything that I could get my hands on. And that...idea of being action oriented really impacted the way that I see evaluation and research and policy also, because I think one of the reasons I wanted to do policy was looking for ways to create change.”

~ Evolving Evaluation Participant

EVALUATOR ROLES

Finding 4

Evaluators described the multiple roles they serve—from facilitator, thought partner, capacity builder, policy maker, to social justice advocate, and change agent.

Participants saw their evaluation role as an opportunity to create knowledge by depicting a multifaceted understanding of complex issues. Evaluators shared they are well positioned to support change, especially those committed to

transformative work and utilizing evaluation findings to support racial justice. In this respect, evaluators held space for difficult conversations and supported equity work, especially during the civil unrest surrounding George Floyd's murder. This is one way that evaluators saw themselves as taking on a leadership role in different communities as they uplifted community needs and centered community stories.

"I feel like as leaders in evaluation, we sort of have to find that balance of how our identity juxtaposes with how we do our work, and how it allows us to show up in those authentic spaces, the communities that we work with. And communities are obviously defined based on the context in which we're in. So, it could be geographical, it could be other types of definitions. But at the end of the day, it's about how we are in service to that community, however we define it, right? And really, I've honestly found myself very drawn to leaders who highlight how significant it is to work collectively with folks or stakeholders in the communities in the work."

~ Evolving Evaluation Participant

EVOLUTION OF PRACTICE

Finding 5

For evaluation practice to advance, evaluators have had to unlearn what they were taught and dismantle early evaluation teachings around concepts of objectivity, validity, and rigor.

Evaluators critiqued traditional evaluation methods and the need to conform to white mainstream culture in the different academic institutions where they studied. Participants mentioned interrogating long-accepted evaluation concepts such as validity and objectivity and unlearning some of their white-centered academic teachings. They advocate for dismantling oppressive structures to critically examine how evaluation knowledge has been generated and used. This has meant revisiting traditional evaluation paradigms and drawing from updated

frameworks and approaches (e.g., Indigenous evaluation, CREE) that are more inclusive, valuing lived experiences and community assets. In fact, participants argued that CREE strengthens the validity of evaluation design, note they have appreciated the resources and trainings offered through ETB and AEA that have helped advance their practice.

"I like the fact that you also seek to dismantle the historical and ongoing tactics of oppression by imploding the fields to look critically into the people's practice.

I like that we are really deep diving into everything."

~ Evolving Evaluation Participant

"So, when we think about looking at information, it changes completely how we think about gathering information. We, in evaluation research, gather information and observations from participants as if they have no power, as if their observations and insights and capacity to make meaning. And no, it doesn't exist. As if the only thing they can give us is their experience when in fact, collective meaning-making. Even if people have no education, no formal education, they still can participate in collective meaning-making [...]."

~ Evolving Evaluation Participant

Finding 6

With more evaluation experience, comes the acknowledgement that expertise must be balanced with a learning orientation.

Participants described themselves as being on a learning journey and remarked that it is dangerous when evaluators position themselves as experts with all the answers. They view themselves as acknowledging the experience and expertise they bring to their work while maintaining a learning orientation. This also includes breaking down barriers to evaluation to create an inclusive process that brings community members into the change work. They viewed their CREE journey as including the perspectives of individuals that have historically been excluded from the evaluation process. This evolution reflects the awareness of the power they bring to evaluation spaces, particularly white evaluators that advocate for a CREE approach.

EVALUATOR ROLES

Finding 7

In spaces aligned with white supremacy, racially and/or ethnically diverse evaluators endure additional challenges such as microaggressions and performative DEI.

Approaches, such as DEI workgroups, were viewed as superficial responses to racism, and not intended to address the systemic issues that perpetuate inequality. For example, one participant shared an experience of wanting to develop a racial equity plan in response to the murder of George Floyd, only to have this idea be rejected by their company's board. While there may be genuine interest among some in supporting racial equity work, others are not ready to engage at this time. **Racially and/or ethnically diverse evaluators**, in particular, described having to shoulder DEI efforts while facing white supremacy. In these spaces, they viewed CREE as a transformational practice that can challenge and dismantle racism creating a fundamental shift in evaluation.

"So I think that when we discard the excellence imperative and make it be about something that's being done for black people, it's just like whenever an organization wants to address racism and they immediately go for diversity, equity, inclusion training, and they put [...] whoever of color in charge of that, rather than saying, it's about transforming the way, those who have been blinded to their contribution to this problem on purpose."

~ Evolving Evaluation Participant



Finding 8

Resistance and healing are essential for those advancing CREE.

Both communities of color and the evaluators who serve them are interconnected through the harm they experience, underscoring the need for healing and respite within both groups. This was described as necessary to develop resilience for the long-term work that is necessary to advance CREE and other anti-racism efforts. And important to building resilience is having a network of like-minded colleagues that can offer support, a space for healing, and find opportunities for joy amid the challenges. It is finding the balance between the action and resistance with the need for rest and renewal.

"The same kinds of harm that's done to the communities that we serve as people of color are the same kinds of harms that we experience. And so, the thing I didn't get a chance to talk about is how important healing and respite is within the community of evaluators as well as for the communities that we serve and the people who work in the organizations and institutions that serve them."

~ Evolving Evaluation Participant

"I've also found that being able to create spaces of support and encouragement for each other has been very good, again, to keep those values and not feel like you're doing this alone [...] pushing against those walls [...]."

~ Evolving Evaluation Participant

ORGANIZATIONAL EQUITY WORK

Finding 9

Organizations reflected on their equity practices and how white supremacy shows up in their organizations but need to move beyond performative commitments.

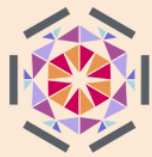
The racial justice protests during the pandemic prompted organizations, particularly funders, to reflect more deeply on their equity practices and how whiteness is embedded in their organizational cultures. There is concern within the field that the momentum toward racial equity and CREE may be temporary, sparked largely by the anti-racism protests during the pandemic. Many evaluators report a surge in interest and commitments to racial equity, but they note the difficulty of translating commitment into sustained, meaningful action. An example shared involved a philanthropy-serving organization that attempted to launch a racial equity plan post-George Floyd's murder, only to encounter reluctance from a conservative board and membership base. This illustrates the uneven readiness within organizations and raises concerns about whether racial equity efforts will be sustained or remain in a short-term response to external pressures.

"I don't know if this resonates at all with your experience, but it's so hard to go from commitment to action. It's like one thing to say when I'm really committed to responsive evaluation, and I want to do it this way. [...] Is there a sustainability plan here? We just don't want it to be a one-time thing."

~ Evolving Evaluation Participant

"And we are, since George Floyd's murder, starting to talk more about race and that people in charge of the organization are asking me how do we have these conversations? So, I feel valued. I also feel like there's a time limit on it, where when people go through this conversation, or my boss wants me to get back to my real work, there will be a day where I'll be asked to shift my focus back to my original mandate and I'm dreading that day."

~ Evolving Evaluation Participant



Study Conclusion

In conclusion, the experiences and reflections of participants highlight both the profound progress and persistent challenges within the field of evaluation as it seeks to embrace CREE practices. Central to this work is the power of relationship-building—among peers and with communities—to foster support, reduce isolation, and challenge entrenched inequities. Evaluators bring their lived experiences and multifaceted identities to the forefront of their practice, acting as facilitators, advocates, and change agents committed to dismantling oppressive systems and advancing racial justice. However, this evolution of practice requires continual unlearning of traditional norms and a commitment to community-centered approaches. While evaluators remain steadfast in their learning journeys and in resisting white-dominant structures, they also recognize the emotional toll and the critical need for healing and collective care. Finally, despite organizational momentum sparked by the racial justice movements, evaluators caution that true equity demands sustained systemic action beyond performative commitments as the need for advancing CREE remains both urgent and ongoing.





Evolving Evaluation Guiding Questions

Set 1: The formation and evolution of your evaluation philosophy, approach, and practice:

- What is your approach or philosophy toward evaluation?
- How has your evaluation practice evolved from when you first began your career in evaluation through today?
- What does it mean to be a leader in the field of evaluation or in your evaluation community? How do you demonstrate or practice leadership?
- Where/how did/does your lived experience provide insight into your role as an evaluator?
- What are important relationships and experiences that have influenced your practice and thinking?

Set 2: Why CREE and your practice in the context of COVID-19:

- Why were you initially drawn to using a CREE approach in your work? Why do you use a CREE approach? What shifted for you in your practice/approach that made CREE useful?
- How does CREE show up in your practice (e.g., project examples)? Can you share some specific examples?
- What are some challenges/obstacles that have emerged in your practice of CREE? What advice do you have in addressing these challenges/obstacles?
- How has COVID-19 challenged your practice? How have you shifted your practice? What are times or events that necessitated a change in your approach?
- Have there been times in your practice when CREE did not seem like the best approach or did not work out?

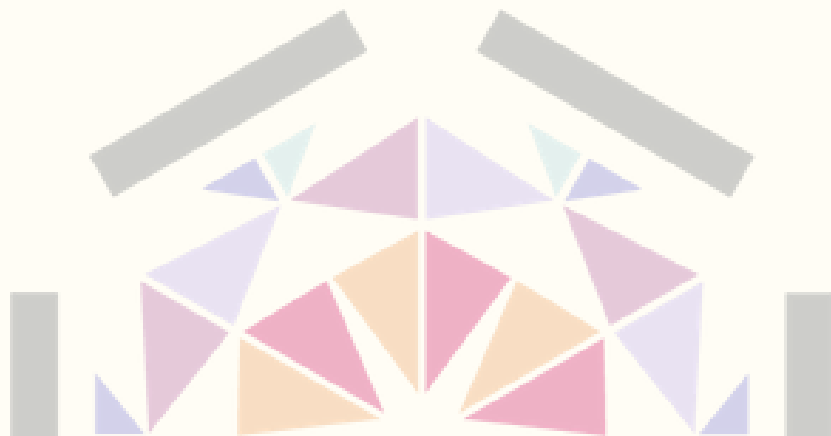
Set 3: Interrogating the field of evaluation:

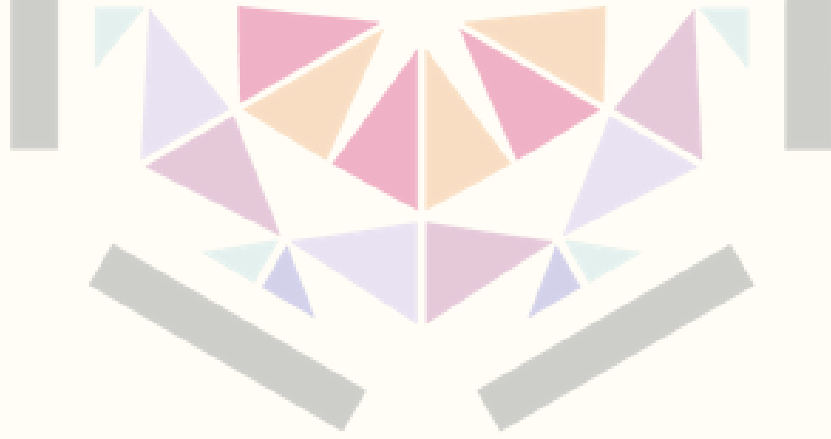
- How do you reconcile the exploitative history of research and evaluation, specifically to diverse communities, in your own work?
- What changes do you believe need to happen in the evaluation field to advance the practice of CREE?



Acknowledgement to Participants

The ETB Team is so grateful to the participants that contributed to the Evolving Evaluation research study. We acknowledge the effort they invested to participate in these research conversations and engage their colleagues. The questions may have initiated difficult conversations, and we appreciate their willingness to be open and forthcoming in speaking to their evaluation experiences. We also appreciate their diligence in recording these discussions and submitting their recordings to the ETB Team.





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