WestEd Justice & Prevention RESEARCH CENTER

Reflections on Applying Principles of Equitable Evaluation

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Disclaimer

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Introduction

Funders have expressed growing interest in designing evaluations to counter the power dynamics of traditional approaches to evaluation and to promote equity for study participants and other community members (Dean-Coffey, 2018; CEI, IFDL, DAJCP, & Luminare Group, 2017). Equitable evaluation is an approach that addresses the dynamics and practices that have historically undervalued the voices, knowledge, expertise, capacity, and experiences of all evaluation participants and stakeholders, particularly people of color and other marginalized groups. Adopting equitable evaluation principles requires that evaluators engage in a process of ongoing self-reflection and adjustment, including a willingness to question and adapt traditional evaluation methods in response to stakeholder input. Evaluators and funders must be prepared to share ownership of the evaluation process by ensuring that study participants and others invested in the intervention have the opportunity to participate in and drive decision-making.

Implementation of these principles has implications for every stage of the evaluation process, including selection of evaluators, study design, data collection and analysis, reporting, and budgeting. "Funders have not only an opportunity, but a moral imperative to lift up and value voices that are often hidden or even silenced, and equitable evaluation is a critical path to do this and to ensure more stakeholders benefit from evaluation investments," notes Jeffrey Poirier, Ph.D., senior associate with the Annie E. Casey Foundation's Research, Evaluation, Evidence, and Data unit. "We are eager to learn how to take steps to deepen equitable evaluation practices in our research and evaluation investments at Casey, and this report provides a valuable perspective for informing how we do that."

The Annie E. Casey Foundation (Casey) commissioned WestEd to conduct four evaluations over the past two years. This brief reflects on those evaluations and, more broadly, on the authors' experience in conducting research and evaluation studies. The brief explores the following questions:

- What is equitable evaluation and how can it be applied?
- Reflecting on both the evaluations for Casey and other experiences conducting research and evaluation, what lessons can inform how to implement equitable evaluation principles in the future?

The purpose of this brief is twofold:

1. For researchers to consider ways in which the design of future studies can best align with funders' growing interest in promoting equity
2. To build the capacity of both funders and researchers to reflect on how equitable evaluation principles can be applied and what might be the implications of an equity-focused approach to research and evaluation

The principles of equitable evaluation promise to add value to the research process and its outcomes. Significantly, the implementation of these principles comes with important decisions related to time, funding, and definitions for rigor in research. An equitable evaluation approach may look different or require creativity to apply in cases — such as systems-level research — in which there is no local, easily defined community of stakeholders or in which the community is particularly large, dispersed, or heterogeneous. The exercise of reflecting on these tradeoffs is important for the evaluation field as well as the philanthropic field, and both researchers and funders bring important perspectives to the table.

This brief is based on the authors' experiences, as well as on many thoughtful conversations with Casey over the course of several years of collaborative work. Nonetheless, the ideas and suggestions shared here are not comprehensive, nor do they fully account for study parameters such as time or funding, which can present real-world limitations on evaluation design and implementation. The authors also do not claim to be experts in equitable evaluation. Instead, this brief is a step in the authors' own processes of understanding, reflecting on, and thinking about how future studies can be designed with equitable evaluation principles in mind. The authors developed this brief in the hope that it generates continued discussion about how research can ideally be designed and implemented to promote equity.

Summary of Equitable Evaluation and Related Approaches

In the past 15 years, researchers have increasingly explored the impact and importance of cultural competence, inclusivity, and equity in their evaluation work. Many evaluators argue that an inclusive and equity-focused approach improves the quality and utility of evaluations (Inouye, Yu, & Adefuin, 2005). Others believe that incorporating these principles is a non-negotiable characteristic of high-quality evaluations. In 2011, the American Evaluation Association released a statement declaring cultural competence in evaluation to be "an ethical imperative" and essential for ensuring the validity of evaluation findings. The updated principles outlined in the 2018 *Guiding Principles for Evaluators* from the American Evaluation Association also draw on concepts of cultural competence and equity in evaluation. A group of evaluation theorists and practitioners echo this thinking in a compilation of chapters focused on "a range of visions for how evaluation can and should play a much larger role in facilitating social equity and justice across the globe" (Donaldson & Picciotto, 2016, p. 4).

An important aspect of equitable evaluation is the recognition that researchers, practitioners, and philanthropists must work together to challenge and address common biases in evaluation. In this respect, equitable evaluation builds on previous scholarship around culturally responsive research and multicultural evaluation. A culturally responsive approach to evaluation depends on researchers' and philanthropists' ability to engage in a continuous, reflexive process of self-assessment. Inouye and colleagues (2005) suggest that funders in particular benefit from assessing themselves and the evaluation process both during and after a study's completion. Sample questions for funders include the following (adapted from Inouye et al., 2005, pp. 50–51):

1. Did the evaluator possess adequate levels of understanding about the cultural context of the community and/or target population studied?
2. Did research methods consider the cultural diversity of the community studied?
3. Did the evaluator exhibit facility with cross-cultural interactions?
4. What was done differently within this multicultural evaluation? What were the tradeoffs?
5. To what extent did a multicultural focus within this evaluation yield better data (a) to inform strategic grant-making in diverse communities and (b) to facilitate quality program improvement within the communities to be funded?
6. Are there lessons from the process of conceptualizing, commissioning, or implementing this evaluation that can be applied to existing and/or future multicultural evaluations?

Equitable evaluation also incorporates many of the learnings from the literature and practice of equity-focused evaluation. Bamberger and Segone (2011, p. 9) describe equity-focused evaluation as an approach that includes many of the typical characteristics of other high-quality evaluation research, including "a rigorous, systematic, and objective process in the [research] design" and a focus on producing "evidence-based information that is credible, reliable, and useful" for decision-makers. Equity-focused evaluation diverges from more mainstream evaluation techniques in its emphasis on "look[ing] explicitly at the equity dimensions of interventions, going beyond conventional quantitative data to the analysis of behavioral change, complex social processes, and attitudes and collecting information on difficult-to-reach, socially marginalized groups." This approach goes beyond culturally responsive evaluation in requiring that researchers understand the context within which an intervention is implemented, including key systems, structures, and power dynamics. Perhaps most important, it demands that evaluators assess how an intervention may contribute to or resist replication of existing inequities within this context, including the possibility that it may have different effects for different populations (Inouye et al., 2005). Like implementation science, equity-focused evaluation also tends to concentrate on the process by which an intervention is implemented as much as, if not more than on its quantifiable outcomes (Bamberger & Segone, 2011).

At the same time, equity-focused evaluation practices can continue to reflect the power dynamics inherent in traditional evaluation, with evaluators (and funders) recognized as the only experts and decision-makers in the research process. In contrast, advocates for equitable evaluation emphasize the importance of engaging a diverse group of local community members in ownership and development of the evaluation process. Such stakeholders can provide input on an evaluation's design, participate in its implementation, provide critical context and background for the study, validate or challenge researchers' findings, and ensure that those findings are meaningfully shared and applied to future practices and policies (Inouye et al., 2005). Researchers like Dean-Coffey, Casey, and Caldwell (2014, p. 90, citing LaFrance & Nichols, 2008) have extended the concept of equitable evaluation to the philanthropic sector, where they have drawn particular attention to the potential for "evaluation findings or the process itself" to positively or negatively impact equity for the community of focus. This recognition demands that both researchers and grant-makers intentionally address — and potentially mitigate — the influence of their own perspectives and biases on the evaluation process and its outcomes.

Rogers (2016) offers a framework (based on the BetterEvaluation Rainbow Framework) to help researchers think through the "equity implications of every choice made about the evaluation methods and processes" (p. 199). Important considerations raised within the framework include what it means for researchers and funders to define the intended user of an evaluation and how different types of stakeholders may use or respond to an evaluation in different ways, depending on their personal experiences of inequity. In addition, researchers may choose to include evaluation questions that specifically ask about equity to ensure that these issues are addressed. The Equitable Evaluation Initiative (CEI, IFDL, DAJCP, & Luminare Group, 2017) has also identified several important ways in which researchers and philanthropists can advance this work:

- Engage a diverse population of stakeholders and incorporate stakeholder input.
- Contextualize quantitative data using qualitative information about community members' lived experiences and ensure that these data reflect multiple, diverse perspectives from the community.
- Reflect on inequities in the systems studied and ways to avoid replicating them in the study's findings.
- Identify distinct populations affected by the initiative and ensure that each perspective is included.
- Evaluate research materials and approaches to ensure that they are culturally competent and that they account for historical and cultural context.
- Exercise caution in generalizing findings.
- Be intentional and transparent about how foundation staff and researchers influence the design, implementation, and findings of the study.
- Self-reflect on the funder's role in the initiative.
- Share findings publicly.

Although there are many reasons for grant-makers, researchers, and communities to promote the use of equitable evaluation, including principles from equity-focused, culturally responsive, and multicultural evaluation, application of these practices does not come without certain tradeoffs. For example, Inouye and colleagues (2005, pp. 27–32) note that the very qualities that define "multicultural evaluations" — inclusivity, cultural competency, a mixed-methods and contextualized strategy, and an emphasis on relationship-building, process, and iterative analysis — can make such evaluations more expensive than "traditional evaluations." The same qualities can also make equitable evaluation more time-consuming and therefore more costly than traditional top-down, quantitative, and outcomes-focused approaches.

Like other types of participatory evaluation, equitable evaluation also requires that researchers and grant-makers give up a certain amount of power and control over the evaluation process. This shift opens the door to new insights and perspectives that would not be given equal weight in a traditional evaluation. The process of applying equitable evaluation principles may come with uncertainty and even discomfort. Funders, evaluators, and other stakeholders must work together to negotiate their roles, and funders and evaluators will need to become comfortable with sharing decision-making. Establishing this clarity and mutual understanding about each stakeholder's goals, limitations, expectations, priorities, and vision for the evaluation from the beginning can ultimately be productive. However, the time and energy required to manage these relationships, as well as the need for funders and researchers to be willing to make compromises to secure consensus, may discourage some evaluators from taking on a participatory approach to evaluation.

There may also be situations in which competing values result in a decision not to prioritize certain equitable evaluation principles in a study. For example, stakeholders may express the need to protect participants' confidentiality or to keep findings internal to enable those sharing data to speak freely, without the burden of knowing that the evaluation's findings will be made public. In this situation, researchers and funders may grapple with the decision to sacrifice transparency in the interest of greater inclusivity and data quality. In another example, researchers and funders may be working in a context that makes it difficult to prioritize inclusivity and participant engagement — there may be pressure to complete an evaluation quickly to meet a time-limited goal or policy decision or to take advantage of a time-limited opportunity, such as funding or participant availability. In these cases, the timeline may not allow for the inclusion of all stakeholders in the design, implementation, and analysis of data. It is important that evaluators and funders recognize these tradeoffs and the potential for pushback from stakeholders. The best solution in each of these cases is for researchers, funders, and other stakeholders to openly discuss the advantages and disadvantages of each available option so that everyone has the opportunity to weigh in and everyone understands the rationale for the final decision.

Integrating the Principles of Equitable Evaluation Into Future Research and Evaluation

Reflecting on previous research and evaluation studies, the authors of this brief identified a number of points in the research process that can be leveraged to integrate equitable evaluation principles and to improve the overall quality of research outputs. These leverage points and examples are also summarized in the appendix, Characteristics of an Equitable Evaluation and Recommendations for Funders and Evaluators, which compares traditional evaluation strategies with equitable evaluation strategies. Adoption of some of these strategies may require expanded evaluation study timelines and budgets. However, others can be incorporated into a study without a large shift in time or costs if the evaluation team and funder commit to the equitable evaluation strategies early and build them into the scope of work and evaluation plans. The role of evaluators is to bring the principles of equitable evaluation to funders as part of evaluation plans and proposals so that these become central to the work of both evaluators and funders in how evaluations are approached. Evaluators and funders should also reinforce the value of equitable evaluation principles when explaining the design of the study to other stakeholders, including study sites and participants. This section summarizes a few potential opportunities for integrating the core principles of equitable evaluation into future work.

Selection of evaluation team

Guiding Assumptions: Effective research teams are culturally competent and ideally include individuals who bring a diverse set of perspectives, skills, identities, and lived experiences. Both the diversity and the cultural competency of the research team benefit from inclusion of members of the community studied.

Reflections and Strategies: Community members can be included as advisors, decision-makers, and implementers of the study. For example, researchers might train a small group of community members to collect data in the form of surveys or interviews. Community members or implementers of the intervention studied can also provide important context for and interpretation of the results of quantitative or qualitative data analysis. An important part of this process is clearly defining and communicating the boundaries of the study, including being explicit about which stakeholders are included, which are not, and why. It may be helpful for researchers to consider the following questions (adapted from *Race Equity and Inclusion Action Guide*, Casey, 2014, p. 6):

1. Who is most adversely affected by the issues being addressed in the initiative under evaluation? Who faces racial barriers or bias, or exclusion from power, around this initiative and related issues?
2. How are people of different racial groups differently situated or affected by this initiative and the issues it is intended to address?
3. How can stakeholders exercise real leadership and power in this evaluation?
4. Who needs to be recruited or invited to join this evaluation? Who will approach them? How? When? What will they be asked to do to get involved?

Once researchers have identified the stakeholder demographics and perspectives that need to be involved in the evaluation team, it is necessary to develop a plan for approaching and engaging people who are willing and able to give their time as part of the work. When possible, it may be helpful to begin by identifying individuals in the community who are interested in the evaluation and willing to help recruit others to participate. These may or may not be the same people who also help researchers identify study participants. Recognizing that there are often unique costs (time, gas, child care) for stakeholders who participate in evaluation teams, researchers might also consider budgeting for stipends or honoraria for stakeholders who take on this role.

Development of evaluation questions

Guiding Assumptions: Strong evaluation questions are developed using preliminary data on the community context and history of the initiative, reform, or program. These questions guide the evaluation in documenting and analyzing systemic and institutional patterns of inequity, including racism and poverty.

Reflections and Strategies: The first step to developing an evaluation design is often constructing the evaluation questions. These questions then determine the design and data collection methods. This step is often done without any input from the community or participants of the evaluation. To create more equitable and inclusive evaluation questions, a first step could be to gather information on the community context and the initiative studied. This may mean conducting a number of interviews, reviewing documents, visiting the community, attending community events, or talking to other communities who are further along in their implementation of a similar or the same initiative.

The design of the evaluation questions themselves can also reflect a focus on equity. Researchers can incorporate aspects of systems analysis in an evaluation by developing questions that probe stakeholders' experiences of underlying systems of inequity, such as the presence of "racial inequities, barriers or negative outcomes" or of institutional practices or policies that affect individuals differently on the basis of race, gender, income, or education (*Race Equity and Inclusion Action Guide*, Casey, 2014, p. 8).

Development of study design and data collection strategies

Guiding Assumptions: Maximizing the inclusion of multiple stakeholders improves the process of designing the study. Data collection strategies should also be designed and implemented to maximize participation to get the most accurate picture of the policy, program, or practice.

Reflections and Strategies: Members of the community, including youth and family members, should be included in decision-making about all aspects of the evaluation design. It is important that this process begins with a common understanding of how decisions will be made to ensure that all members of the evaluation team, including study participants and other community members, can contribute in meaningful and authentic ways. When designing the study, evaluators should also consider ways to maximize the participation of a wide range of community members in data collection. For example, focus groups enable more key informants to participate in a data collection process across multiple stakeholder types. Each focus group can be constructed as a "role-alike" group, in which individuals who have similar roles come together, or as a mixed group, in which individuals who have different roles come together and are able to hear from others. Focus groups can gather more nuanced data than interviews, and they can provide participants who are involved in an initiative with a constructive opportunity to hear from others, build off their experiences, and learn from each other. A focus group or a town hall–style meeting can also give participants the chance to react to interpretations of the data and come up with their own recommendations while providing researchers a forum within which to test the validity of findings with different stakeholder groups. However, it is important that there are also opportunities for participants (e.g., frontline staff, youth, family members) to develop and share their own interpretations of the data independent of evaluators or funders. The opportunity for researchers to work closely with the community to facilitate meaningful discussions can benefit both a community and an evaluation.

Evaluators should also consider the use of in-person interviews and site visits. Although valuable information can be gathered by phone and through online surveys, in-person interactions with stakeholders build trust and provide an opportunity to convey information that would not otherwise be collected. When in-person interactions are not possible, a compromise is to use a video platform for interviews or focus groups — video creates a face-to-face environment between the interviewee and the researcher and can result in a more authentic interaction. However, for this type of interaction to succeed, participants must have access to a computer and the Internet, and they must have some degree of comfort using a video platform. These requirements may make some interviewees feel uncomfortable or add a level of uncertainty that could prevent them from fully engaging in the interview. In those cases, a telephone interview may be the best and most appropriate option. The key is to balance the mode of data collection with the feasibility and comfort of the interview participants. Regardless of the method of data collection, evaluators and funders must work together to ensure that the design of the evaluation allows sufficient time for the inclusion of multiple perspectives.

Protocol and survey development

Guiding Assumptions: Stakeholders can offer valuable feedback and revisions to protocols and surveys.

Reflections and Strategies: When developing data collection instruments such as interview and focus group protocols and surveys, involving representatives of the stakeholder groups who will participate in data collection can contribute to a better instrument. With stakeholders' support, these data collection instruments can be designed to reflect the community context and the language used locally. Stakeholders can also help identify key questions that outside evaluators may not have thought to include, particularly questions that solicit information valued by stakeholders rather than by external researchers or funders. Stakeholders may begin by drafting questions or recommending data points that are important to gather, followed by participating in rounds of review with other members of the evaluation team. The design process can also be approached in a formal way with a draft survey, in which a few selected participants are asked to take a survey and provide open-ended feedback on it or to answer interview questions about their experience, expressing their ideas on what was missing, what else they would like to include, and which questions may not be relevant. This approach is often used in education evaluation when evaluators invite students to take a survey and provide feedback to the evaluator on key questions, the language that is used, and any parts of the survey that are unclear or do not reflect their school environment or student experience. A similar practice can be built into community and other place-based evaluations, as well. Although it may be more time consuming or logistically challenging, the payoff of an improved data collection tool that best reflects the population and the community can be worth it.

Selection of interview and survey participants

Guiding Assumptions: Ensuring that all voices are represented in the evaluation — whether through interviews, focus groups, or surveys — improves the quality and credibility of evaluation findings.

Reflections and Strategies: Evaluators should practice inclusion and diversity in the recruitment and selection of interview and survey participants. It is particularly important to hear the perspectives of youth and families, recognizing that the selection of study participants can support or inhibit the study's ability to capture variation in community members' experiences. This recognition is especially important in thinking about racial/ethnic equity and inclusion. Authentic youth engagement is a value that drives much of Casey's work, and in the context of evaluation, the inclusion of youth and families in the evaluation process can strengthen the design, methods, data collection, and interpretation of findings. One logistical consideration is the method of collecting data over the telephone versus in person. Although in-person data collection presents some challenges for an evaluation — such as cost, time, and travel — it also has the advantage of more authentic engagement from both the evaluation team and the data collection participants.

Data collection and coding

Guiding Assumptions: Evaluations are important opportunities to build the capacity of community members who may assist in a collaborative evaluation approach, including assisting with data collection.

Reflections and Strategies: Although evaluations are meant to be objective and are often conducted by an independent third party, there may be some cases in which there is also an opportunity to build the evaluation capacity of participants. For example, there may be opportunities in which it would make sense to train others in the community to collect evaluation data. If youth or families are interested and could lead data collection efforts, their leadership in this aspect of the process may have a number of advantages. Beyond building the capacity of these youth or families to contribute to and own the work, it may also result in increased participation of other youth and families in the data collection process. Also, more authentic, accurate, and detailed data may result when the data collection is conducted by someone of the same stakeholder group. At a minimum, inclusion of community members in the research process ensures that the study accounts for multiple perspectives and lived experiences even if the formal evaluation team is more homogenous or not representative of the local community. Peer-led data collection can be a particularly effective approach in cases in which participants may not be comfortable or willing to share information directly with researchers.

Design, development, and use of final product

Guiding Assumptions: A successful final product is relevant, transparent, and accessible to all stakeholders as well as useful for both the funder and the local stakeholders.

Reflections and Strategies: Evaluation products can serve multiple purposes and be tailored for different audiences. Evaluation findings should be provided to stakeholders in multiple formats, such as briefs, written reports, and presentations, informal as well as formal, so that all participants have the opportunity to learn about what was found as a result of the data collected. Involvement in the community from the beginning about the kind of product they would like to see from the evaluation would help the evaluation team plan for such a product. Creating documents that are shorter, more visual, and available in multiple languages are examples of how evaluation findings can be shared more broadly. However, specific product designs will vary based on the study, and community members are often best positioned to identify ways in which study findings can be made relevant for local use. It is also important to have members of the community and participants review the final products and provide feedback and input. For example, community members may be able to take the findings from the data analysis and develop their own recommendations for program improvement that could be included in a final product. And there may be findings with which participants disagree or that they do not find favorable, and in these cases, it is valuable to offer opportunities for participants to correct inaccuracies and provide context for the findings. Helpful discussions may come from these divergences. Integrating stakeholders' input in these ways can help ensure that the evaluation gathers and reports on information in a way that is meaningful and relevant for all stakeholders. Although it is important that the evaluation design, methodology, and analysis remain as rigorous as possible so that findings are data-based, evaluators and funders should always balance quantitative results with qualitative data in order to reflect and honor the diversity of community perspectives.

Conclusion

There were several strengths and limitations to the earlier Casey studies that the authors of this brief conducted and that informed the reflections in this brief. Common strengths included involvement of stakeholders and funders in defining success of the initiatives studied; stakeholder involvement in reviewing or developing data collection tools and final products; and the willingness of stakeholders and Casey staff to participate in a limited assessment of their own roles in the processes studied. However, the designs of these studies, like all studies, had several limitations. Common parameters (e.g., budget, timeline, and scope) for both funders and evaluators made it difficult to develop a complete picture of each process and its outcomes and to engage all stakeholders in data collection. The principles, strategies, and reflections in this brief are the start of how to begin to adjust the approach, design, and implementation of the authors' work to integrate the core principles of equitable evaluation and to improve the overall quality of future evaluations.

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Appendix: Characteristics of an Equitable Evaluation and Recommendations for Funders and Evaluators

Adapted from *Commissioning Multicultural Evaluation*, Exhibit 1-2, "Characteristics of a Multicultural Evaluation" (Inouye, Yu, & Adefuin, 2005, p. 10) and the *Equitable Evaluation Framing Paper* developed as part of the Equitable Evaluation Initiative (CEI, IFDL, DAJCP, & Luminare Group, 2017, pp. 6–10).[1]

	Traditional Evaluation	Equitable Evaluation	Recommendations for Research and Evaluation
Audience/Client	An evaluation's funders determine the evaluation's goals and design. The funders are the primary audience and the only client for the evaluation.	The community and the funders each contribute to the evaluation's goals and design. The audience and the client for the evaluation include both funders and a diverse cross-section of community members and other key stakeholders.	Forming an advisory committee is one strategy that can help researchers and funders engage diverse perspectives in shaping an evaluation. Committee members might include funders, members of the evaluation team, and members of the community, all of which will have an equal voice in decisions about study design and implementation. The tasks of the committee are to review all stages of the work, including the evaluation questions, research design, sample, outreach materials, protocols and tools, results, and reports.

[1] These recommendations are based on the authors' reflections on their experiences in research and evaluation. The strategies described here represent just a few potential opportunities to center and promote equity and inclusiveness in evaluations. In practice, researchers and funders must tailor these strategies to local context, history, and resources, such as time, funding, and the quality of relationships with community stakeholders.

	Traditional Evaluation	Equitable Evaluation	Recommendations for Research and Evaluation
Evaluator	• Formally trained evaluators are the experts. • The evaluator leads the evaluation and is the judge of the initiative being evaluated. • The evaluator might not represent the language, culture, racial or ethnic composition, perspectives, or lived experiences of the community.	• Grantees, community members, and formally trained evaluators each bring valuable expertise to an evaluation. Each individual knows best her or his issues and strengths. • The evaluator is the facilitator, translator, and convener. • The evaluation team includes people who share the identities and experiences of community members.	• The core evaluation team might include a diverse group of researchers and community members. Together, the community members use advisory committee input to determine the study design; participate in outreach and data collection; develop codes; design final products; and provide fact-checking, feedback, and key context for the study findings. The evaluation team could engage in discussions about analysis of quantitative data to ensure that they are balanced with and contextualized by qualitative data drawn from the community. • As described above, an evaluation advisory committee that provides guidance for the study might meet multiple times throughout the evaluation period, with the evaluator acting as the facilitator, translator, and convener.
Design and Planning	• The evaluator develops the design with the funders or presents the design to the funders for approval.	• The evaluator works to establish rapport and trust with stakeholders (community members) and to engage them in an inclusive planning process that infuses multiple worldviews.	• The evaluation team could spend time in person at the study site(s) to observe the community/system/organization within the context of day-to-day work to build understanding and develop relationships. The team could conduct preliminary in-person interviews to gather input on the key evaluation questions from all stakeholders and incorporate the input into the evaluation design. Local stakeholders could provide input and guidance on design and identify potential pitfalls and opportunities at the outset of the evaluation.

	Traditional Evaluation	Equitable Evaluation	Recommendations for Research and Evaluation
Data Collection	• The evaluator conducts the data collection.	• A representative group of key stakeholders helps to collect data. These stakeholders are often trained in data collection methods. Data collection is facilitated by the evaluator.	• It might improve the level of trust in the evaluation process to engage at least one member of each stakeholder group in the study process from the beginning. When the evaluation team is ready to conduct data collection, these stakeholders would be ready to answer questions about the decisions being made in the course of the study because they would be "co-owners" of the process. Given that context, colleagues and other community members might be more willing to participate in interviews or focus groups with those stakeholders and with other members of the evaluation team. • It might be helpful to increase the sample size and diversity of those interviewed across each site by training members of the study site to gather a more complete picture of the experience of how the study sites have tried to implement a policy, program, or practice. • In these and other cases in which there are trusting relationships between participants, focus groups could also be an effective means of gathering information and would provide study participants with opportunities to reflect on the experiences documented in the study.

	Traditional Evaluation	Equitable Evaluation	Recommendations for Research and Evaluation
Data Analysis	• Results and their meaning are analyzed by the evaluator.	• Results and their meaning are derived with a focus on analyzing culture, context, systems, structures, institutions, and underlying drivers of inequity. Key stakeholders have the opportunity to participate in data analysis. Findings reflect both evaluators' and stakeholders' interpretations of the data.	• One strategy for processing data collected through studies is to hold town hall–style meetings at which the results of the data collection are co-presented by the advisory team. The audience could then hold a discussion to interpret the meaning and implications of those findings and to determine recommendations that would result from those findings. The evaluator would facilitate this meeting, but it would be a community-driven process. • Another option is that within the core evaluation team, researchers and community members could work together to develop a coding scheme and co-interpret the findings. Versions of findings could then be shared with representatives from each stakeholder group to check for accuracy, provide important context, and otherwise react to the evaluators' initial conclusions.
Reporting	• This is usually a written report and is often accompanied by a brief presentation to the funders.	• Results and evaluation products have relevance and utility for diverse communities beyond the funders. The products are jointly disseminated by funders, the evaluator, and the stakeholders and are presented in nontraditional formats.	• Multiple products relevant to each stakeholder might be developed in conjunction with the advisory team. Shorter briefs, online data dashboards, narrated PowerPoint presentations, and interactive reports are examples of the different types of reports that could be created and presented through different modalities. Co-presenting findings in person with community members who assisted in the data collection should also be considered. However, it may be most helpful to consult each stakeholder group to determine which style of reporting would be most helpful and relevant to them.

	Traditional Evaluation	Equitable Evaluation	Recommendations for Research and Evaluation
Application of Findings	• The findings are used by the funders to monitor and judge the quality of local stakeholders' activities and outcomes.	• The findings are used by funders and community stakeholders to build the capacity of the community and community organizations.	• To promote the transparency and utility of a study, it may be valuable to make findings available to all community members, particularly participants. Findings may also be developed into products that can be used as learning tools for future programs and initiatives. The funders might support initial dissemination and implementation of these tools as an extension of the study.