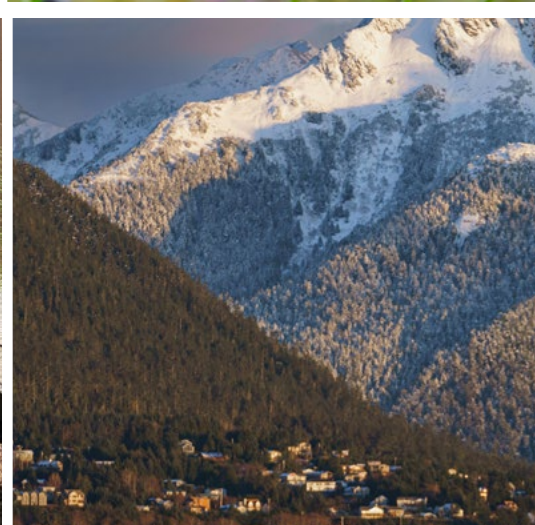
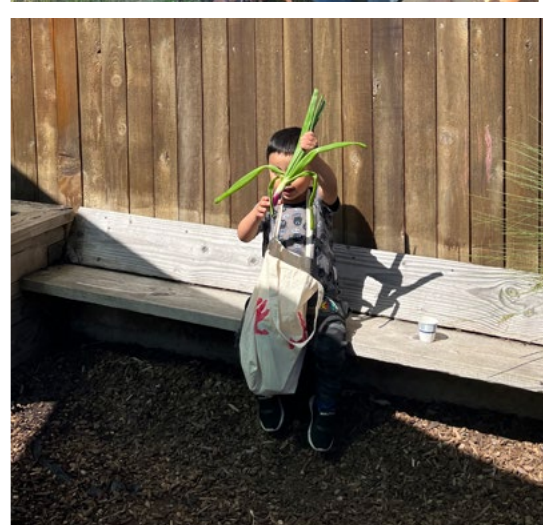


EQUITABLE EVALUATION AT ECOTRUST

A summary of activities conducted to develop and adopt evaluation principles, practices, and tools that are equity-centered and community-focused

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Ecotrust



Spring 2024

Letter from the team

We are pleased to present a summary of our work to develop an equitable evaluation approach and practice for Ecotrust. This work has deepened both our evaluation practice and our journey to center racial and social equity in all that we do, and we believe it benefits all the programs that we co-create with our partners and communities across our region.

Our aim was to center equity in evaluation, a discipline that is often based on dominant culture assumptions about nonprofit programs and their beneficiaries, which can result in inequitable evaluation design, process, and findings. We hope this document will provide guidance and understanding of the steps our team took to incorporate equity in our evaluation efforts. We describe them in the following sections: first, we share a brief background of our evaluation efforts at Ecotrust ([page 4](#)); second, we describe our process in adopting equity centered practices, beginning with engaging with consultants and then choosing principles, selecting a pilot project, hosting design sessions with partners, and finally creating a toolkit ([page 11](#)). We then present a case study on the Viviane Barnett Fellowship ([page 8](#)); fourth and finally, we outline a list of tools available in our new toolkit ([page 11](#)).

We learned an immense amount from listening to our partners and past participants, in shaping a template for our future work. We believe that sharing our experiences in building an equitable evaluation practice could prove insightful for other organizations that are on a similar equity journey and looking for ways to improve their evaluation approach.



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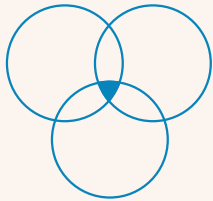


KENADI SMITH
Green Workforce Academy
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Ecotrust's equitable evaluation principles

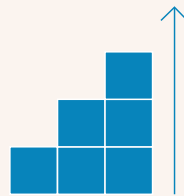
These principles are based on the core principles of Equitable Evaluation, Culturally Responsive Evaluation, and the American Evaluation Association. With guidance from our consultants, [Austin Advocates With](#) (AAW) and [Insight for Action](#), we chose the principles we felt were most applicable and wordsmithed them to reflect our understanding of ourselves as evaluators at Ecotrust seeking to center racial and social equity. We published a blog post with more details on the four principles—[read it here](#).

Four working principles adopted by Ecotrust in 2023 will guide the design and execution of our evaluation.



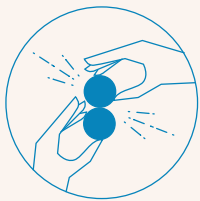
EQUITY AT THE CENTER

The practice of evaluation should be in service of and contribute to advancing equitable and just outcomes in the communities in which we partner. Our evaluations will be culturally responsive, developed collaboratively, and prioritize the needs and goals of participants.



ACKNOWLEDGE HISTORICAL AND CULTURAL CONTEXT

We understand that the practice of evaluation must be informed by historical and cultural context; it must seek to understand the effect of a strategy both on differently situated groups and the underlying systemic drivers of inequity.



RECOGNIZE POWER DYNAMICS

We recognize the power dynamics between evaluators and participants. We co-create our evaluations with our partners to empower program participants by reflecting their visions of success and desired outcomes.



BE AWARE OF INDIVIDUAL BIASES

Our team works to recognize our individual biases. As evaluators, we acknowledge how our background and other life experiences may impact the conduct of an evaluation. We work to understand how aspects of identity, including race, gender, class, indigeneity, ethnicity, culture, ability, language, and positional power, can influence an evaluation.

Background of evaluation at Ecotrust

Ecotrust's Measurement and Evaluation (M&E) team was founded in 2018. Before 2018, Ecotrust lacked a consistent, organization-wide approach to measuring impact across all its myriad programs, projects, functions, and investments. Our M&E work began with the development of a Theory of Change in 2019, its refinement in 2020, and the publishing of Indicators Reports in 2020 and 2021.

While our 2020 Theory of Change clearly identified racial and social equity outcomes, we still lacked robust methods for measuring progress toward these outcomes. Our evaluation work was ad hoc and tailored to the requirements of funders, including foundations and government agencies, rather than centering the needs of partners, participants, and communities or building our own capacity to serve our partners. Additionally, our indicators were more focused on scale, such as the number of jobs created or businesses supported by our programs, than on the depth or significance of our impact. The development of our Strategic Plan in 2021 provided us further motivation to measure progress toward our goals of climate resilience and justice; intergenerational wealth-building in BIPOC (Black, Indigenous, and people of color) and frontline communities; and racially and economically just land and water stewardship.

Though we had read about the Equitable Evaluation Initiative and its approach to rethinking evaluation practice, we needed the support and guidance of practitioners to help us apply it to our work. We released a request for proposals in 2022 seeking an equitable evaluation consultant, and we selected AAW and Insight for Action due to their expertise in this approach, as well as the related approaches of principles-based and systems-based evaluation. Our work reflects the weaving together of all three of these strands: we center equity in our work to advance systems change, based on our core principles.

The next section describes in greater depth the process that AAW and Insight for Action guided us through to arrive at our current approach.

Our process

We worked with consultants from AAW and Insight for Action in three phases:

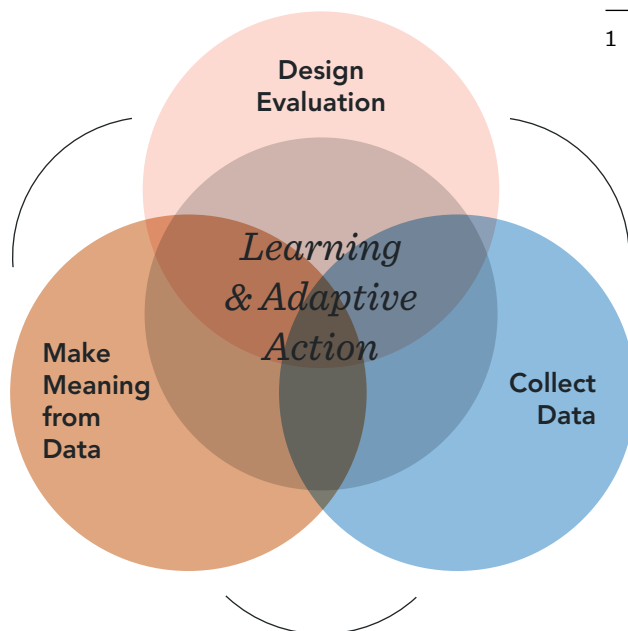
Phase 1

In the first phase, our consultants engaged with colleagues that work closely with our team to understand the landscape and breadth of work of M&E at Ecotrust in three areas: process/capacity, evaluation support, and culture/learnings. Our consultants gained a list of key informants from the M&E team, chosen with the intention to center BIPOC voices, while keeping in mind not to overburden BIPOC colleagues. Informants were also from various functional areas of the organization, from programmatic to operations, and of varied positional power. AAW and Insight for Action conducted seven 30-minute interviews. These insights were used to tailor the content for coaching and training in Phase 2.

Phase 2

In the second phase, our consultants conducted three workshop sessions with the M&E team. These sessions included learning to identify white supremacy culture characteristics¹ in evaluation settings and ways to counter them and create alternatives; choosing equity-centered principles for our future evaluation work; and workshopping the application of these principles in an evaluation process, from design to meaning-making. The M&E team further refined the principles (distilling it from seven to four principles, among other adjustments) as displayed on page 3.

A key takeaway is understanding that equitable evaluation is a learning and adaptive process that centers community. The graphic below, used by permission from our consultants, illustrates the cycle of evaluation and the ways in which learning and adaptation continually occur throughout the process (Figure 1).



1 <https://www.whitesupremacyculture.info>

Figure 1. *The Evaluation Cycle as a Learning and Adaptive Process*

Phase 3

At the completion of the training sessions in Phase 2, we chose a pilot project, the Viviane Barnett Fellowship, to apply our newly learned processes. In particular, the pilot project allowed us to conduct design sessions with partners, past participants, community members, and other affected parties of this project. We emerged with an evaluation process and series of questions to understand the effect of that program, thoughtfully informed by affected parties. Further detail about these design sessions and the Viviane Barnett Fellowship are in the following section.

Phase 4

In the fourth and final phase, we moved toward the application of our newly established principles and learnings from the pilot project. We have built an equitable evaluation toolkit that will facilitate future evaluation projects at our organization. The toolkit contains templates and guiding equity questions that are applicable for any project seeking to conduct evaluation activities. A description of the tools in our toolkit are found on page 11.

What's ahead

We have begun applying this toolkit to two emerging projects at Ecotrust that span different subject matters (i.e. food systems equity; Indigenous agroforestry) and continue to prioritize these tools in our engagements with project teams and new partnerships. As we work together, we also continue to refine these tools to find the sweet spot of how it can work effectively across a diverse range of projects.



Viviane Barnett Fellows with Ecotrust team members and partners at Black Futures Farm. Jason Hill



Top row: Yolotli X; Alisha Howard*; Nyanga Uuka, workshop facilitator; esperanza spalding*, Herbert Young*, joemil r. santos*. Bottom row: Punneh Abdolhosseini*, Insa Evans*, Mick Rose*, Aaron Vargas, Sabrina Cerquera. *Viviane Barnett Fellow. James Kwele*

Case study: Viviane Barnett Fellowship

About the Fellowship

The Viviane Barnett Fellowship (VBF) for Food Systems Leaders is a cohort-based program designed for aspiring, emerging, and experienced BIPOC food system leaders. It aims to create pathways for food systems leaders of color to collectively build more equitable, regenerative, and climate-smart food systems. The fellowship is a collaborative effort and partnership between Black Food Sovereignty Coalition, Ecotrust, and Mudbone Grown. The inaugural pilot cohort

hosted 14 fellows that ranged in disciplines and intersections with food systems. The pilot cohort launched in June 2021 and concluded in October 2022, a total of 18 months.

While the pilot cohort of VBF did not have a formal evaluation process, facilitators and partners provided multiple touchpoints for fellows to provide feedback: through one-on-one meetings with mentors and facilitators and informal conversations. A second cohort of the Fellowship is set to launch soon, which will adapt lessons learned from the pilot.

A few factors led to the selection of the VBF pilot as our case study:

- The program’s intentions and goals center racial equity
- It is collaboratively managed among community partners
- The pilot lacked a formal and intentionally planned evaluation process, allowing the evaluation team to start with a creative slate

The level of reach and intended community impact of VBF also made it an inviting opportunity to demonstrate that equitable evaluation methods can benefit the needs of participants and community leaders when we center affected parties.

Centering equity to evaluate VBF

The program manager of VBF reached out to partners, community members, and past participants to establish a panel. Together with the evaluation team at Ecotrust, this panel would guide and shape an evaluation practice for the forthcoming cohort of VBF with an equitable evaluation lens.

The panel was reflective of affected parties in the pilot cohort, which included collaborative partners, community partners, past facilitators, and alumni of VBF. They consisted of five members: two fellowship alumni, one past facilitator, one external partner, and two collaborative partner members. Each person in the panel was offered an honorarium for their time, feedback, and input, especially during the design sessions.

The design process

The intentionally selected panel members participated in three in-person design sessions:

Intro to Equitable Evaluation Principles and Framework	<ul style="list-style-type: none">• Session focuses on building a collaborative environment• Partners communicate culturally responsive evaluation needs
Co-creation of the Equitable Evaluation Template	<ul style="list-style-type: none">• Partners review template guide and we make adaptations• Facilitators document recommended modifications to the tool• Partners review culturally responsive tools
Application of Template to Programs	<ul style="list-style-type: none">• Partners engage in small groups to brainstorm how to practice applying the template in their program contexts• Partners share out reflections• Facilitators refine the list of adaptations

The design sessions established community agreements on learning as a group along with shared core vocabulary on racial equity. Our consultant from AAW guided the design sessions, which included an introduction to the equitable evaluation principles. This helped create a shared understanding of how evaluation can be used to measure progress and identify strengths and barriers towards advancing equity in programmatic work. Most importantly, these design sessions were an opportunity for the panel to provide critical input and feedback on the evaluation design

for the next cohort of VBF through breakout sessions and group discussions.

In addition to the three sessions above, the panel was also invited to attend an optional sense-making session where our consultant facilitated learnings and takeaways from the design sessions, as well as a debrief of the design process.

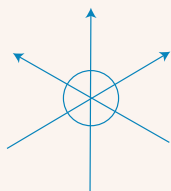
The learnings from the design sessions and overall principles of equitable evaluation will be used in the evaluation plan for the next cohort.



The closing celebration for the Viviane Barnett Fellowship's first cohort included fellows, program staff, and community members. Jason Hill

Our Equitable Evaluation Toolkit

Here are short descriptions of the tools we developed as a result of this process. These tools are meant for use as and when needed; not every tool will be used for every evaluation engagement. Through the use of the Equitable Evaluation Toolkit, we can apply an adaptive process to how we evaluate our projects across Ecotrust.



Equity Lens

The Equitable Evaluation Lens helps us consider our approach to designing, collecting data for, and deriving meaning from our evaluations. It contains equity-centered questions for each stage of the evaluation process, from design, to data collection, to data analysis and interpretation or meaning-making.

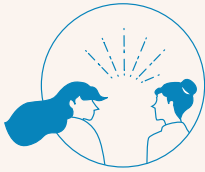


Thumbnail

The Thumbnail provides a snapshot of the entire evaluation process of a given project. This tool directly responds to the needs named by project teams, based on their engagement with our consultants in Phase 1 (see pg. 5), where the M&E team could provide better support. The Thumbnail is a template to be used for evaluating projects across Ecotrust.

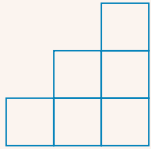
The document is laid out as follows: First, with our principles in mind, we name the *evaluand*, which is defined as the project or program that is the subject of this evaluation. We identify the purpose of the evaluation and what the priority evaluation questions are. We include the evaluation process diagram (as seen on pg. 5) to remind teams of the adaptive and learning process that is evaluation. The team members contributing to the evaluation are named in the next section, as well as their roles and responsibilities. The document also identifies evaluation methods the team might be considering and reasons these methods are appropriate for this study. Questions to consider in this methods section also relate to the inclusion of affected communities in data collection, analysis, and interpretation. Lastly, the Thumbnail includes an implementation plan that names each deliverable and timeline and the cadence that the team wishes to set forth.

Cont. →



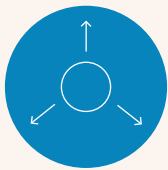
Partner Engagement Questions

The Partner Engagement Questions give us an opportunity to include affected parties in planning an evaluation. Together we reflect on our goals for the entire process, including all of the steps outlined in the Thumbnail. If a previous year of programming exists and is relevant, we reflect on it using this tool.



Activity Budget Template

The Activity Budget Template gives an overview of the costs associated with the evaluation's project team and staff, as well as outside contractors, food and travel expenses, and partners that might be involved in the process.



Evaluation Process Sheet

The Evaluation Process Sheet is a step-by-step guide, with check-in questions for conducting the evaluation throughout the lifecycle of a project or program. It is intended to be a reference for the team to stay on track with milestones in the implementation plan. It can be modified to fit the context and needs of the project. For example, if a survey is needed for data collection, the process sheet asks the relevant questions to clearly state the process of creation and the intended use of said survey.



Meaning-making Questions

The Meaning-making Questions exist to guide the interpretation of findings from the evaluation data analysis, a discussion-based process designed to be inclusive of affected parties. The purpose of this step is to gain insight from affected parties regarding the meaning of evaluation findings, rather than relying on the evaluator's worldview and assumptions. Meaning-making sessions can also help the evaluation team determine the appropriate deliverable to report findings, including the appropriate level of sharing and privacy associated with different pieces of the findings.

Get in touch

For more information about our process or these tools and their applicability, please contact the Ecotrust Measurement and Evaluation team:



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