EQUITABLE EVALUATION TOOLKIT: INSTRUCTIONS FOR USE

This brief guide provides context and instructions for each tool in Ecotrust's Equitable Evaluation Toolkit, linked below. This toolkit is meant to be adapted to the needs of your project. Successful use of the toolkit doesn't require the use of every tool, and the tools themselves can be modified. We strongly encourage you to use the first tool, Equity Considerations. We also encourage you to consider using the second tool, Thumbnail, in whole or in part based on what your project needs. The rest you may find useful based on the needs of your project.

1. Equity Considerations for your Project

These three sets of questions are for review before your evaluation project begins. The purpose is to ensure that you are centering racial equity, as well as all other forms of social equity, from the outset of your project. These questions are meant to be answered at a high level, in brief summary. The tools that follow will help you answer these questions in more detail.

Though you are encouraged to have a community engagement strategy before your evaluation begins, don't worry if you can't answer all these questions at the outset. Continue to reach out to the communities and partners you're working with to understand their desired level of engagement in the evaluation, as well as their questions and concerns. Revisit these questions as the project progresses; your answers may evolve based on the feedback you hear from partners, program participants, and other affected parties from the communities you're working with.

2. Thumbnail Evaluation Plan

This tool is the cornerstone of your evaluation project. It is an essential tool for identifying the primary purpose or motivation for your evaluation; assigning roles and responsibilities to team members; identifying and justifying evaluation methods; and planning the sequence of activities, from design to data collection, analysis, meaning-making, and reporting. It can also be modified to suit your purposes; or filled out in stages over time as you gain more clarity on your evaluation process.

The Thumbnail begins by reviewing the four phases of an evaluation project: Design, Data Collection, Data Analysis, and Meaning-Making & Reporting. Following that review come our four

Equitable Evaluation Principles. Please read them, ideally aloud, with your entire team before beginning the process. The next section of the Thumbnail asks for an overview of the evaluand, which is a term from the field that just means "whatever you are evaluating": the program, project, initiative, or component thereof that is the subject of the evaluation. The following section asks you to explain the purpose of the evaluation, the questions underlying the evaluation, and the intended uses and audiences for the evaluation. Though these may seem self-evident, please don't skip this section! Different team members and community members may have different views of these topics. The intended uses of the evaluation may be broad, or narrowly defined. The intended audiences of your evaluation may be internal to your organization; external audiences such as partners, adjacent community organizations, funders, or policymakers; or even the public. It's best if your team can anticipate who will be using the findings ahead of time!

The following sections of the Thumbnail ask you to identify:

- Your team members and their respective roles and responsibilities;
- Your evaluation methods, including an explanation of why you chose them, who will implement them, and from whom data will be collected; and
- Your work plan, including start/end dates, tasks, leads and contributors to each task, product/deliverable, and timelines or due dates; and an explanation of your work plan, including your process of sharing findings, and generating and implementing recommendations.

Once you finish the Thumbnail, you will have a detailed overview of your evaluation: who will be responsible for completing what pieces of work, by when, and why! Now the real work begins: engaging partners, participants, and affected community members at their desired level of engagement to co-design the nuts and bolts of the evaluation itself, with special attention paid to the data collection, meaning-making, and reporting processes. You'll also want to develop a budget. The next three tools will help you achieve all those aims.

3. Participation Questions for Evaluation Design and Data Collection

These questions are meant to guide a participatory design and data collection process that engages a range of affected parties to your program, such as current and former participants, partner organizations, community leaders, and at-large community members. One or more of your M&E Team members will facilitate or co-facilitate the design sessions, ideally in collaboration with a program leader. There are separate sets of questions to follow the first two phases of the evaluation process, Design and Data Collection. Answering these questions will set your evaluation process up for success.

Please use this tool to match your partners' and affected parties' desired level of engagement in the evaluation. You are not obligated to use both tools; you might find that a Design session is a high priority for your partners/affected parties, but not a Data Collection session. Also, you are free to modify the questions for each phase, including adding or dropping questions based on the desired level of community engagement or the priorities of the communities and partners you're working with.

- The first set of questions, Design, is meant to be presented before the program begins. It asks affected parties to reflect on the desired experience of the program itself, the desired level of knowledge about incoming participants, and the types of data collection needed at the outset of the program, such as intake interviews or surveys.
- The second set of questions, Data Collection, is meant to be answered very early in the program. It asks participants for the details of what they believe each data collection instrument should look like, how each instrument is intended to support program evaluation and development, who benefits from the collection of data, and who should provide input or guidance. Data collection instruments could be surveys, interviews, focus groups, polls/pulse checks, brief check-ins, listening sessions, or any combination thereof. The results of this discussion should inform the Evaluation Process Template (tool #5 on the following page).

4. Data Collection Process Template

This tool is a template for designing data collection processes for two types of instruments: surveys and interviews. The template asks for very precise information about who will design and test the survey or interview protocol; who will collect the data, from whom, and over what period; and how results will be analyzed, interpreted, and shared. If you answer all the questions on this template, you will be in command of the logistics of designing a survey or interview process that will center equity and reflect the questions your evaluation is seeking to answer.

This template should be filled out by M&E staff with input from program leaders and managers. It is not meant to be a participatory tool, rather, a series of checkpoints to ensure that the data collection process incorporates equity-centered considerations. If you conducted participatory design sessions for the data collection phase (see tool #3 above), please refer to the results of those sessions to inform your answers to the questions on this template.

5. Activity Budget Template

This is an example budget, in Google Sheets workbook form, for an equitable evaluation process that includes participatory design and meaning-making sessions. The budget estimates hours by phase of the project, including Design, Data Collection, Analysis, Meaning-Making, and Reporting; as well as Orientation and Close-Out, and hours set aside for Project Management including regular team and partner check-ins, file organization, and task management. Complete instructions for use are contained on the first tab of the workbook. To use the template, please make a copy and label it according to the project you are evaluating.

6. Guidance on Meaning-Making and Reporting

This tool walks you through the process of making meaning from evaluation data, and sharing the findings with a range of impacted parties, including program staff, leaders, partners, and funders. It consists of the following components:

- The **Guidance on Meaning-Making and Reporting** asks questions and provides guidance about the specifics of each of these phases.
- The **Meaning-Making Session Format** is meant to structure a post-program feedback session, facilitated by the evaluation team that may include program leaders and staff, partners, and other contributors to the program. It asks participants to reflect on program results, and provide feedback on both the program itself and the methods of evaluation used to measure its success.
- The **Meaning-Making Question Bank** is an unordered list of questions that can spur meaning-making discussions. Any of these questions can be substituted for the examples given in the Meaning-Making Session Format.
- The **Learning, Sharing, and Reporting Questions** should be answered by program leaders in collaboration with the evaluation team. These questions are meant to generate takeaways/learnings and recommendations from the evaluation and the experience of the program. Program leaders are also asked to highlight privacy concerns, and identify which takeaways should be shared with which affected parties (partners, funders, the public, etc.)