

EQUITY REFLECTION QUESTIONS

Metris seeks to engage in ethical and culturally responsive research and evaluation. To us, cultural responsiveness means acknowledging and valuing people's diverse experiences and expertise. It means understanding the context in which clients operate and the histories of the communities they aim to support. We also believe our research and evaluation work can act as a tool for building more equitable communities.

We use these equity reflection questions as one way of practicing equitable evaluation and cultural responsiveness. We reflect on these questions during the arc of each project, from project design to reporting and presenting findings. These questions help us check our assumptions and make our work accessible to and reflective of the people at the center of each project. We don't treat this set of questions as a check list or a test. Rather, they help us make intentional decisions during a project.

Overarching

(to reflect on throughout a project)

- What social identities and groups do I belong to?¹ How might they color the lens through which I view the world?
- What privileges and power do I have in this situation? How am I different from the project stakeholders?²
- Am I practicing research/evaluation that's equitable vs. equal?
 - Equity involves trying to understand and give people what they need to enjoy full, healthy lives. Equality aims to ensure that everyone gets the same things in order to enjoy full, healthy lives.³
 - Have I shifted thinking away from a focus on sameness and treating everyone identically to a focus on treating everyone appropriately and accommodating their differences?⁴
- How can we incorporate antidotes to white supremacy culture⁵ throughout the research/evaluation in order to disrupt racial hierarchies?

Project design

(scope, evaluation plan and timeline development, theory of change & logic model development)

To consider about the client

- What are the self-serving purposes of the research/evaluation to our client?⁶
- What prompted our client to initiate this evaluation project? What are the client's goals for this evaluation and what do they want to learn from it?⁷
- What is our client's capacity to engage in the proposed project and act on its findings?⁸
- How is our client and/or project funded? What interests (and potential conflicts of interest) could be suggested by their funding?⁹
- How can we identify opportunities to help increase our client's capacity and build upon existing community strengths and resources?¹⁰
- Historically and currently, what is the client's position in the community it seeks to support? More broadly, what is the client's position vis-à-vis geography (e.g., neighborhood, town/city,

region) and/or their field?

To consider about the community

- What am I assuming about each group of stakeholders in the research/evaluation?¹¹
- Who is most adversely affected by the issue being addressed in the research/evaluation? Who faces racial barriers or bias, or exclusion from power, related to this issue?¹² What quantitative and qualitative evidence of inequality exists? What evidence is missing or needed?¹³
- Are stakeholders with a stake in this work involved in project design?
 - Ideally, what would the racial composition of an advisory group look like?¹⁴
 - In what ways are stakeholders most affected by the issue already involved in addressing it? How can these efforts be supported and expanded?¹⁵ Who is already doing this work and hasn't been acknowledged?
- What is the community's history, specifically its history of racism? How does the project design incorporate an understanding of this history?
 - What factors may be producing and perpetuating racial inequities associated with the issues the research/evaluation seeks to address? How did the inequities arise? Are they expanding or narrowing? Will the research/evaluation address root causes? If so, how?¹⁶
- What past experiences has the community had with researchers and evaluators?¹⁷
- How can we build compensation/incentives into our budget to both 1) show stakeholders that we value their time and contribution and 2) reduce barriers to participation that some community members may experience?¹⁸

General considerations

- Are there enough resources and time for me to build relationships and trust with the client and the community? If not, can I still conduct this research/evaluation without compromising its cultural competency? By cultural competence, we mean possessing the knowledge and skills to work with people from different cultures by having an open mind, not making assumptions, and asking the right questions respectfully.¹⁹
- Have we considered data collection tools and strategies appropriate to the information we need to know? Have we put too much emphasis on empirical studies and tools that produce quantitative evidence?
- Will the selected methods produce information that is respected and trusted by community members and additional stakeholders? (For example, if a community has been over-surveyed in the past, strongly consider other methods that will better tell the story of the community.)²⁰
- How will the findings/recommendations be used? Who will use them, and will they be public?²¹

Instrument development & data collection

- Who is in my sample and what do I need to know about them?²²
 - What is their relationship to our client?²³
 - What is their vested interest in the results of this research/evaluation?²⁴
 - What assumptions do we need to check?²⁵
- Have I vetted the instrument as appropriate to the participants' culture?²⁶
 - Are the language and response options confusing, off-putting?²⁷
 - Do the language and response options resonate?²⁸

- For surveys, are the response options and demographic questions most inclusive of, appropriate, and reflective of the study population?²⁹
- How can I minimize the burden of data collection?³⁰
 - What is the best way to gather data from participants³¹ in terms of
 - Modality (e.g., survey, focus group)
 - Length (e.g., number of survey questions, length of an interview)
- What is the best time for me to collect data from participants?³²
- What language should I use?
 - Vocab/lexicon & literacy level³³
 - Does my introductory language make respondents feel comfortable, informed, respected?³⁴
- Who should collect the data so that participants feel comfortable and safe?³⁵
 - Who has shared experience with the priority population, knowledge about the population, and awareness of biases?³⁶
 - Who will be best able to fully understand the context and nuances of responses?³⁷
 - In focus groups, how will we ensure the everyone is listened to, manage the dominant talkers, and respectfully encourage less vocal participants to share their thoughts?³⁸
- Are we following best practices for collecting demographic data?
- Will we be able to disaggregate our data by race, if appropriate?
- In a literature review, have we sought out information in multiple mediums (e.g., written documents, oral histories) and produced by a diverse range of fields?

Data interpretation and analysis

- What kinds of response bias might be present? What steps did we take to minimize/mitigate this bias?³⁹
- How might my own biases influence how I interpret and analyze the data?
- Does the complexity of my analysis match the complexity of the initiative/issue that I'm researching/evaluating?
- How should I disaggregate the data (e.g., by race/ethnicity, gender, economic class, geography, gender, etc.)?⁴⁰
- Who needs to see and provide feedback on preliminary findings? How should I present and gather feedback on these findings?

Reporting and presenting findings and recommendations

- Can the average person not steeped in evaluation/research terminology understand the findings/recommendations?⁴¹
- Based on what we know about how the findings/recommendations will be used, are we reporting findings/recommendations using the right communication mediums and tools?
- Have we considered ways to incorporate first-person community perspectives into the narrative?⁴²
- Have we considered presenting findings from an “assets” point of view rather than a “deficits” point of view (e.g., graduation rate instead of dropout rate)?⁴³
- How will the findings/recommendations be perceived by each racial and ethnic group affected by the findings/recommendations?⁴⁴

- What are potential unintended effects (both short- and long-term) of the findings/recommendations?⁴⁵
 - Will community members face adverse effects?⁴⁶ How will findings/recommendations affect each racial and ethnic group in the community?⁴⁷
 - Will the findings/recommendations be used to build capacity of a community and not just for monitoring/judging?⁴⁸
 - Will the recommendations promote systemic changes?⁴⁹ How will recommendations help increase racial equity and dismantle white supremacy?
 - How will the recommendation interact with existing policies, programs, etc. to help advance desired outcomes, including racial equity?⁵⁰
 - Are there further ways to maximize equitable opportunities and impacts?⁵¹
- Are there provisions to ensure ongoing data collection, public reporting, stakeholder participation and public accountability?⁵¹
 - How will the client/community monitor how systems and actors react to the recommendations?
 - Is the client/community willing and able to make tweaks to the recommendations as necessary to continue working toward racial equity?

¹ Kien Lee, PhD, “The Importance of Culture in Evaluation: A Practical Guide for Evaluators” (The Colorado Trust, 2012).

² Lee, PhD, “The Importance of Culture in Evaluation: A Practical Guide for Evaluators.”

³ The Annie E. Case Foundation and Terry Keleher, “Race Equity and Inclusion Action Guide: 7 Steps to Advance and Embed Race Equity and Inclusion Within Your Organization” (The Annie E. Case Foundation, 2014).

⁴ Public Policy Associates, Incorporated, “Considerations for Conducting Evaluation Using a Culturally Responsive and Racial Equity Lens,” 2015.

⁵ Kenneth Jones and Tema Okun, “White Supremacy Culture,” in *Dismantling Racism: A Workbook for Social Change Groups*, 2001, http://www.cwsworkshop.org/PARC_site_B/dr-culture.html.

⁶ Lee, PhD.

⁷ Laura Bekes et al., “Practical Tools for Designing and Implementing Culturally Responsive and Inclusive Evaluations,” *Learning for Action* (blog), December 18, 2017, http://learningforaction.com/lfa-blogpost/culturally-responsive-evaluation?utm_medium=email&utm_campaign=2017%20Year%20in%20Review&utm_content=2017%20Year%20in%20Review+CID_c4ee3afb7029c1e40a417bf674702f39&utm_source=newsletter&utm_term=Practical%20Tools%20for%20Designing%20and%20Implementing%20Culturally%20Responsive%20and%20Inclusive%20Evaluations.

⁸ Bekes et al.

⁹ Bekes et al.

¹⁰ Bekes et al.

¹¹ Lee, PhD.

¹² The Annie E. Case Foundation and Keleher, “Race Equity and Inclusion Action Guide: 7 Steps to Advance and Embed Race Equity and Inclusion Within Your Organization.”

¹³ Terry Keleher, “Racial Equity Impact Assessment” (Race Forward, 2009).

¹⁴ The Annie E. Case Foundation and Keleher.

¹⁵ The Annie E. Case Foundation and Keleher.

¹⁶ Keleher.

¹⁷ Lee, PhD, “The Importance of Culture in Evaluation: A Practical Guide for Evaluators.”

¹⁸ Bekes et al., “Practical Tools for Designing and Implementing Culturally Responsive and Inclusive Evaluations.”

¹⁹ Lee, PhD, “The Importance of Culture in Evaluation: A Practical Guide for Evaluators.”

²⁰ Bekes et al.

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- ²¹ Lee, PhD, “The Importance of Culture in Evaluation: A Practical Guide for Evaluators.”
- ²² Lee, PhD, “The Importance of Culture in Evaluation: A Practical Guide for Evaluators.”
- ²³ Bekes et al., “Practical Tools for Designing and Implementing Culturally Responsive and Inclusive Evaluations.”
- ²⁴ Lee, PhD, “The Importance of Culture in Evaluation: A Practical Guide for Evaluators.”
- ²⁵ Bekes et al., “Practical Tools for Designing and Implementing Culturally Responsive and Inclusive Evaluations.”
- ²⁶ Public Policy Associates, Incorporated, “Considerations for Conducting Evaluation Using a Culturally Responsive and Racial Equity Lens.”
- ²⁷ Bekes et al., “Practical Tools for Designing and Implementing Culturally Responsive and Inclusive Evaluations.”
- ²⁸ Bekes et al.
- ²⁹ Bekes et al.
- ³⁰ Courtney Huff and Amy Ramos, “Making Evaluations of Evidence-Based Models Culturally Appropriate,” *Harder+Co* (blog), July 26, 2017, <https://harderco.com/making-evaluations-of-evidence-based-models-culturally-appropriate/>.
- ³¹ Lee, PhD, “The Importance of Culture in Evaluation: A Practical Guide for Evaluators.”
- ³² Lee, PhD.
- ³³ Bekes et al.
- ³⁴ Bekes et al.
- ³⁵ Lee, PhD, “The Importance of Culture in Evaluation: A Practical Guide for Evaluators.”
- ³⁶ Public Policy Associates, Incorporated, “Considerations for Conducting Evaluation Using a Culturally Responsive and Racial Equity Lens.”
- ³⁷ Public Policy Associates, Incorporated.
- ³⁸ Bekes et al., “Practical Tools for Designing and Implementing Culturally Responsive and Inclusive Evaluations.”
- ³⁹ Bekes et al., “Practical Tools for Designing and Implementing Culturally Responsive and Inclusive Evaluations.”
- ⁴⁰ The Annie E. Case Foundation and Keleher, “Race Equity and Inclusion Action Guide: 7 Steps to Advance and Embed Race Equity and Inclusion Within Your Organization.”
- ⁴¹ Lee, PhD, “The Importance of Culture in Evaluation: A Practical Guide for Evaluators.”
- ⁴² Bekes et al., “Practical Tools for Designing and Implementing Culturally Responsive and Inclusive Evaluations.”
- ⁴³ Bekes et al.
- ⁴⁴ The Annie E. Case Foundation and Keleher, “Race Equity and Inclusion Action Guide: 7 Steps to Advance and Embed Race Equity and Inclusion Within Your Organization.”
- ⁴⁵ John Powell, “Systems Thinking, Evaluation and Racial Justice,” *Philanthropic Initiative for Racial Equity* 3 (July 2010), <http://raciaequity.org/docs/CI3/powell.pdf>.
- ⁴⁶ Lee, PhD, “The Importance of Culture in Evaluation: A Practical Guide for Evaluators.”
- ⁴⁷ The Annie E. Case Foundation and Keleher, “Race Equity and Inclusion Action Guide: 7 Steps to Advance and Embed Race Equity and Inclusion Within Your Organization.”
- ⁴⁸ Endo Inouye, Cao Yu, and Adefuin, “Commissioning Multicultural Evaluation: A Foundation Resource Guide.”
- ⁴⁹ Public Policy Associates, Incorporated, “Considerations for Conducting Evaluation Using a Culturally Responsive and Racial Equity Lens.”
- ⁵⁰ Keleher, “Racial Equity Impact Assessment.”
- ⁵¹ Keleher.