Incorporating equity, diversity, and inclusion (EDI) into our evaluation plans: Facilitation guide

Before the EDI review meeting

From the beginning, EDI principles should be part of evaluation planning including when framing evaluation questions and engaging stakeholders*. Once the logic model and evaluation plan are drafted, an **EDI review meeting** allows dedicated time to focus on EDI with colleagues external to the project team. Steps to plan the EDI review meeting include:

- **Team identifies 1-2 project members** to serve as coordinator and/or facilitator.
- **Coordinator schedules a 1-hour meeting and invites peer reviewers**. If you have more than two peer reviewers, consider 90-120 minutes. For more complex projects, reviewers may require a pre-review meeting to discuss contextual factors or complexities.
- **Facilitator helps project team to identify EDI tension points, questions, and timing** of EDI review.
- **Facilitator adapts the discussion guide** to the current project based on the above discussion. They will focus the review by prioritizing questions and considering project-specific probes.
- **Coordinator provides background information** (including the logic model, evaluation plan, project overview, and the tailored discussion guide) to peer reviewers several days in advance of the review, setting expectation of no more than 2 hours reviewing documents ahead of the meeting. Coordinator should flag specific content (e.g. slide numbers in a large PowerPoint presentation) to help maximize reviewer time.

During the EDI review meeting

- **Facilitator reviews ground rules, meeting norms, agenda, and facilitates the discussion**. Facilitator should stress listening for understanding, maintaining confidentiality, being aware of power dynamics, etc.
- **Coordinator documents reflections and feedback** to be reviewed during post-meeting debrief.

Part 1: Ensure consistent understanding among reviewers

Domain	Key Concepts
Reviewers understand context	• Language used by stakeholders • Which individuals, organizations, and populations are being prioritized • Health or health care disparities within or between prioritized groups and others • EDI-related outcomes this project addresses
Reviewers understand ways EDI is currently being addressed	• logic model/evaluation questions • Measures/indicators and data collection plans • Analysis/synthesis • Reporting

Part 2: EDI review

Background	How might our team's capacity, knowledge, biases, etc. influence the evaluation?
Evaluator knowledge, awareness, experience	• How do we currently assess the effect(s) of our efforts to address health equity? • Which of our cultural frameworks, assumptions, biases might impact this work? • How are we modeling our commitment to advancing progress towards equity?
Evaluator privilege, power, diversity, social identities	• What privileges and power do we have in this situation? • What purposes of the evaluation are self-serving to the sponsor/evaluator? • Does the diversity of our team reflect the needs of the project? • How can we recognize and eliminate bias in our language?
Understanding local context and forces impacting the community	• How should we familiarize ourselves with the community? What do we need to understand about the community to do our work effectively? • What policies, procedures, practices might affect program impact? • How have historical/structural decisions contributed to the issues at hand? • How does cultural context show up in structural conditions and initiative design?

*We acknowledge the controversy around using "stakeholder" given historical colonial context and are considering other wording choices for the future.

For more information, please contact cche@kp.org.
Visit us on the web at cche.org.

Page **1** of 2

Engagement	Who needs to be engaged in the evaluation?
Building relationships	• How are we building relationships with these communities/organizations? • Who should introduce us? How? • What constraints do we have in terms of resources and time that may impact relationship building? How can those be mitigated?
Engaging with communities	• How will we routinely engage community stakeholders in our evaluation? • Whose voice needs to be considered in the evaluation and are they present? • What influence can community stakeholders have? • How do we ensure authentic engagement and avoid tokenism?
Learning about culture	• What support might we need for translation and interpretation? • What support might we need to ensure multicultural validity?

Evaluation	Are our methods sound and reflecting our EDI principles?
Evaluation design	• Does our logic model sufficiently reflect health equity activities and goals? • Do our evaluation questions help us understand the effect on health inequities? • How might the evaluation benefit or harm the program and the community? • Do the evaluation and the program reflect local and organizational culture? • Might strategies have differential impacts on individuals and systemic inequity drivers?
Data collection	• Are plans responsive to cultural context? Is there potential for harm? • What variables help evaluate impact on populations experiencing inequities? • How will we pilot data collection methods to ensure EDI is addressed? • How can we ensure that data is collected in a way that makes participants feel valued? How, where, by whom is data collection conducted?" Will incentives be provided? • What power dynamics exist? How might we address and mitigate their impact?
Analysis	• Does the analysis plan allow us to look at what worked, for whom, and when? • Are we able to determine whether there is differential impact? • How can we engage stakeholders in data interpretation/learning? • How will we monitor and capture unintended consequences?
Reporting/ Dissemination	• How much control does the evaluation have over reporting/dissemination? • How and where do we typically disseminate our evaluation findings? • How will results be shared with different stakeholder groups? What is appropriate to share? How can we more effectively share results (i.e., format, messenger)? • How will results and reports be vetted by relevant stakeholders? Will it tell their stories? • How will we share our findings in plain, clear language that is most accessible and helpful? • Does the plan allow for reporting impact on health equity and EDI? • How can our findings be used to support action in communities of greatest need?
Barriers	• What challenges and barriers might arise when incorporating EDI into the evaluation? • How can we overcome and mitigate issues, and who should be engaged to address them?

After the EDI review meeting

- **Facilitator builds in time in the next project team meeting** to debrief the peer review discussion including:
  o Reflections and reactions? What did we learn?
  o What concrete changes will we make to the logic model and evaluation plan?
  o Should we share the reflections or results with anyone (e.g., funder)? Who else should we engage to answer questions, seek additional feedback, or vet changes?
- **Coordinator documents key insights and reflections** in a central location and thanks reviewers

CCHE used several tools to develop this facilitation guide, including:

- Public Policy Associates, Considerations for Conducting Evaluation Using A Culturally Responsive and Racial Equity Lens.
- Public Policy Associates, Is My Evaluation Practice Culturally Responsive?
- Diversity in Evaluation Projects, Evaluation with a Diversity Lens: Exploring its Functions and Utility to Inform Philanthropic Effectiveness.
- Centers for Disease Control and Prevention, Addressing Health Equity in Evaluation Efforts.