

FEAN Call to Action Series:
Evaluators of Color

Evaluation is So White:

Systemic Wrongs Reinforced by Common Practices and How
to Start Righting Them

Evaluators of Color Action Team

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About FEAN

The Funder & Evaluator Affinity Network (FEAN) is a collective effort to transform how funders and evaluators collaborate, with the goal of deepening the impact of evaluation and learning on philanthropic practice, to advance more equitable and sustainable outcomes. FEAN brings together funders and evaluators to review the current state of evaluation in philanthropy, identify key opportunities and challenges facing the field, and work toward solutions that advance shared capacity both individually and collectively. FEAN's field-shifting strategy is [grounded in a set of shared values](#) among funders and evaluators: inclusion, the need to create space for new and different influencers, collaboration over competition, and optimism. Founded in June 2017, FEAN now has more than 330 members.

Our Funders

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About FEAN's Call to Action Series

In the fall of 2019, five Action Teams made up of volunteers from FEAN's membership, assembled to develop actionable recommendations or tools in five practice areas: **Strategy & Practice, Evaluators of Color, Knowledge Sharing, Global Challenges, and Collaboration & Partnership**. The practice areas were collaboratively selected by FEAN members as areas most urgently in need of change. Over the course of 2019 and 2020, the five teams met and collaborated to develop five products that provide actionable guidance for funders, evaluators, and others in the philanthropic ecosystem in order to achieve a stronger and more equitable field of practice. The five products of the Call to Action Series are:

- **Good Intentions Are Not Enough:** Making Evaluations More Useful for Foundation Strategy and Practice
- **Evaluation is So White:** Systemic Wrongs Reinforced by Common Practices and How to Start Righting Them
- **Knowledge Sharing is a Mission Imperative:** Why We Cannot Afford to Keep Evaluation Findings to Ourselves and How We Can Do Better
- **Advancing Evaluation Practice to Meet Global Challenges:** A Call to Action and Reflection
- **Better Together:** How Evaluator Collaborations Can Strengthen Philanthropy and Increase Collective Knowledge

¹The title of this brief builds on Dr. Vidhya Shanker's question "Why is evaluation so white?" in Shanker,V. (2020, March 2). The [Invisible Labor of Women of Color and Indigenous Women in Evaluation](#). AEA365.

Introduction

Evaluators of color play a critical role in informing philanthropy, elevating the effectiveness of investments, and facilitating greater responsiveness to community needs and priorities.² Along with technical expertise in research and evaluation, evaluators of color bring knowledge, skills, and expertise relevant to the process of social change. **While every person is unique and has access to their own distinctive experiences and insights, we believe that evaluators who identify as black, indigenous, and people of color³ (collectively referred to in this brief as “evaluators of color”) are fundamental to evaluation in service of equity.**

Wesley Lowery⁴ articulated this need for representation in [his recent op-ed for The New York Times](#). His assertions on the importance of black journalists rings true for the field of evaluation as well:

We also know that neutral “objective journalism” is constructed atop a pyramid of subjective decision-making: which stories to cover, how intensely to cover those stories, which sources to seek out and include, which pieces of information are highlighted and which are downplayed. No journalistic process is objective. And no individual journalist is objective, because no human being is.

Journalism and evaluation have shared goals in seeking and speaking truth to power, and the identities of the practitioners are critical. Evaluators of color are not just “nice to have” in our field. Rather, they bring essential perspectives to the practice of evaluation that can help accelerate social change.⁵

² Community in this case may refer to groups who share the same location (e.g., East Oakland), identity (e.g., women of color), interests (e.g., supporters of Black Lives Matter), or lifestyles (e.g., faith-based).

³ People who identify with racial and ethnic groups other than White.

⁴ Lowery, W. (2020, June 23). [A Reckoning Over Objectivity, Led by Black Journalists](#). *The New York Times*.

⁵ This is not to say that other groups, especially those traditionally marginalized within white dominant contexts, do not bring valuable knowledge to the table. Indeed, the field would greatly benefit from more diversity of both people and perspective.

This is true in general but even more so at higher levels of organizational and field leadership. Institutional and systemic racism influences who has access to education and experiences valued by the field, who receives opportunities to work in this field, and who is supported to advance professionally.⁶

Evaluators of color are fundamental to evaluation in service of equity and bring:

- Personal stake and lived experience, facilitating deeper insight on root causes of disparities and disparate impact of organizations and systems.
 - Cultural and historical knowledge, engendering greater empathy and awareness of how culture, history, customs, narratives, intergenerational trauma, and values shape our evaluation findings.
 - Community trust and relationships, enabling candid conversations in ways that can be more challenging for white professionals.
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Evaluators of color find that their talent and expertise are under-recognized and under-valued at every access point and stage in the process—a series of systemic wrongs detrimental to both the individuals and the field at large.

⁶Nolan, C. (2020, June 16). [It's Time to Let Go of Tired Narratives about Talent in Evaluation](#). *Engage R+D*.

Our Goals

What will it take for evaluators of color to flourish in the evaluation ecosystem? Our Action Team of the Funder & Evaluator Affinity Network set out to answer this question, reviewing research and exchanging perspectives across our members, which included evaluators of color and white evaluators representing foundations, evaluation firms, and pathway programs.

The recent civil uprisings and the disparate impact of the COVID-19 pandemic on communities of color have thrown into stark relief the need for more equitable systems throughout American society. As philanthropy strives to address that need, it is imperative to make evaluation a tool “for and of equity” as called for by the [Equitable Evaluation Initiative](#). **Funders, evaluation firms, and pathway programs each have an important role to play in cultivating an ecosystem⁷ that is more inclusive of diverse perspectives and lived expertise.**

While our work is situated in a broader landscape and perspective, this document focuses on systemic challenges evaluators of color face in their educational and career pathways. We draw attention to common practices in the field of philanthropy that have negative consequences for evaluators of color and provide early-stage ideas on mitigating strategies and processes. The ideas are organized around three key stakeholders:

- **Funders.** Foundation staff in evaluation and learning roles as well as program staff who work directly with evaluators.
- **Evaluation firms.** Small to mid-size evaluation firms are the focus here, although ideas may also apply to larger academic institutions and research centers.
- **Pathway programs.** Professional development programs which support evaluators of color through mentorship, internship, job placement, contracting, and networking.

We recognize and state plainly that the challenges and barriers evaluators of color face are systemic and deeply rooted in our culture and society. They are products of a longstanding history of discriminatory practices, policies, and narratives. We share ideas and recommendations that may begin to mitigate these challenges, while honoring the fact that creating a truly equitable field goes well beyond the solutions we offer here. We seek to identify immediate and actionable steps that can be taken now while recognizing there is broader work to be done, and conversations to be had, in order to dismantle white-dominant culture and practices within philanthropy and evaluation.

⁷Ecosystem “considers the roles multiple organizations in our field can play in supporting the entry and advancement of diverse individuals and perspectives within our field.” [Moving from An Evaluator Pipeline to an Evaluation Ecosystem - Where We Are Now; What’s Needed Next](#). Luminare Group, May 2020.



Rethinking Common Practices Among Funders

Funders occupy a unique position of power in the evaluation ecosystem. They can support or hinder the success of evaluators of color in terms of who enters the profession, who advances into leadership at evaluation firms, and whether evaluation firms led by evaluators of color are able to survive and thrive. Barriers are erected when funders signal the kinds of evaluation they will fund and who they want conducting evaluations through their Requests for Proposals (RFPs), when funders make determinations about the purpose of evaluation and the types of expertise that matter, and when these evaluation engagements are the building blocks upon which the professional reputations of evaluators are built.

Here we outline four common funder practices which make it difficult for evaluators of color to flourish in the field of philanthropic evaluation and offer ways to reform these practices, framed in the context of the experiences of evaluators of color.

1. RFPs ask for a scope of work and evaluation design upfront

Funders typically request proposed scopes of work and evaluation designs through RFPs. Successful proposals are expected to present evaluation approaches in a clear, concise, and visually appealing way. Funders often want detailed evaluation designs with descriptions of methodologies and activities, as well as workflow and due dates. It is not uncommon for evaluators to find themselves writing a 20-page proposal response based on a three-page RFP with little information on the project's purpose and candidate selection criteria.

Firms led by evaluators of color tend to be smaller, and they experience RFPs as a significant barrier to entry. The upfront costs of proposal development are significant and almost always uncompensated, giving an advantage to larger firms, often white-led and staffed⁸, which have dedicated staff to support proposal-writing and the financial resources to absorb the cost of unsuccessful proposals.

Mitigating Strategies

Consider alternative strategies that reduce burden and build a two-way conversation:

- **Alternative formats such as Requests for Information and Requests for Qualifications** ask about the evaluator's experience and qualifications, but do not require a full evaluation design. The key here is for funders to think deeply about the needed knowledge, awareness, skills, and experiences rather than listing a standard set of desired qualifications.
- **One-on-one conversations in advance of a full proposal** allow both parties to understand whether the partnership has potential. The evaluator leaves with a better understanding of what the funder's needs are, and the funder leaves with a truer sense of the evaluator's qualifications and work style. A conversational, two-way approach engenders greater mutual respect than a transactional RFP.

⁸ While demographic data on the leadership of evaluation firms is not available, we do observe that most large and established evaluation firms are white-led and that most evaluators are white. As a reference, the racial/ethnic composition of the American Evaluation Association's membership is as follows: 52% White, 8% Black/African American, 6% Asian, 5% Hispanic/Spanish origin, 1% American Indian, 4% more than one race, 4% other, 22% missing data. (*American Evaluation Association 2018 Member Survey Report*, October 2018)

- **Offer a contract to support the evaluation design process, particularly for larger-scale evaluations,** thereby compensating evaluation firms for their effort and facilitating greater intentionality and broader engagement on the evaluation design and work plan.

2. RFPs ask for a diverse evaluation team as a proxy for cultural relevancy⁹

RFPs commonly list the preference for a “diverse team” or “team that reflects the communities we serve” as a desired qualification. In asking for this, funders are seeking assurance that a culturally responsive evaluation will be designed and implemented.

Too often, the definition of cultural relevancy is reduced to skin color, leaving out nuanced indicators like lived expertise or inclusionary practices. This tokenizes evaluators of color, sending the wrong signals and establishing the wrong incentives for evaluation firms. Having a racially and ethnically diverse project team is critical, but this is only the beginning of doing cultural relevancy work—keeping equity at the center of the work as an organization and as individuals is essential.

Cultural Relevancy

Cultural relevancy is effectively reaching and engaging communities in a manner that is consistent with the cultural context and values of that community while effectively addressing the disparities of diversity and inclusion within a system or organization.

(adapted from an articulation by Youth Outside)

Mitigating Strategies

Use the proposal and selection process to signal intention by articulating why evaluators of color are relevant and important.

Recent work from the [S.D. Bechtel, Jr. Foundation](#),¹⁰ [Engage R+D and Equal Measure](#),¹¹ and [Public Profit](#)¹² provide good resources to help funders articulate their project-specific needs. Proposals can be an opportunity for funders to signal the value of cultural relevancy and their willingness to invest in the capacity they seek, for example:

- **Articulate the need for cultural relevancy in addition to the racial and ethnic diversity of the team.** Ask evaluators to describe their approach to cultural relevancy and inquire about it during interviews. Potential ways for funders to signal the value of cultural relevancy as an area of expertise to evaluation firms include:

⁹ We prefer the term cultural relevancy over cultural competence because one never fully achieves full competence – it is an ongoing journey.

¹⁰ Halverstadt, A. (2018, October). [Working with Consultants: Hiring an External Evaluator](#). *S.D. Bechtel, Jr. Foundation*

¹¹ Engage R+D and Equal Measure, (October, 2017). [From Contractors to Conduits: An Exploratory Dialogue among Funders and Evaluators](#).

¹² Public Profit. (n.d.). [Your RFP for Evaluation Services Is Terrible—You Can Fix It!](#)

- **Involving grantees in the selection process.** State upfront that grantees will be part of the interview process and engage them through a review of applicants and the interview process. This should inform the evaluation firm’s staffing decisions and signal the level of community expertise desired by the funder.
- **Asking questions about evaluators’ approach to engaging grantees and community members.** How will the evaluation engage grantees in evaluation design, data collection, and sensemaking? How does the evaluation team engage grantees and communities in ways that are culturally relevant?
- **Inquiring about the potential role of advisory groups or community experts.** Engaging advisory groups and community experts are common practices in content areas such as healthcare, education, or criminal justice—acknowledge cultural relevancy as a complex area of expertise.
- **As a funder, investing in capacity-building that benefits evaluators of color.** Philanthropy has long funded capacity building for emerging leaders of color in the nonprofit sector. Funders can engage evaluation partners on how to better support evaluators of color at their firm, such as dedicated development resources added into their grant or contract.¹³ Resources could support professional development for individuals or equity work for the evaluation firm.¹⁴

3. Funders send RFPs to a limited number of firms based on past relationships and peer recommendations

The field of philanthropy is predominately white¹⁵ and funders tend to rely on who they know when fielding RFPs.¹⁶ Funders often send RFPs to a small selection of evaluation firms they have worked with in the past and firms recommended by trusted peers. Listservs for foundation evaluation and learning staff receive a steady flow of requests for evaluator recommendations. There is a desire to keep the candidate pool manageable because proposal review can be time-consuming—at about one hour per proposal with a team of five reviewers, proposals from six different evaluation firms can take up to 30 hours to review.

The practice favors the go-to, usual-suspect evaluation firms and shuts out firms with fewer connections in philanthropy. Firms led by evaluators of color are more likely to be in this latter group,¹⁷ creating a vicious cycle. Project experiences are the building blocks of evaluator reputation and prestige—having philanthropic clients on your resume creates opportunities for more projects in philanthropy. Projects and contracts can build careers—shutting out firms led by evaluators of color, even if unintentional, creates a ceiling on their careers and businesses.

¹³ Operating margins at small to mid-size consulting firms typically cannot accommodate career development opportunities. (Engage R+D and Equal Measure. (2017, October). [From Contractors to Conduits: An Exploratory Dialogue among Funders and Evaluators.](#))

¹⁴ Mendoza, P. (2020, July 13). [Listening for Change: Evaluators of Color Speak Out about Experiences with Foundations and Firm.](#) *Engage R+D.*

¹⁵ In 2015, 76% of full-time foundation staff were white. At the executive level, nearly 90% were white. (Council on Foundations. (2017). [The State of Change: An Analysis of Women and People of Color in the Philanthropic Sector.](#))

¹⁶ Research has shown that white Americans have almost exclusively white networks. (Cox, D., Navarro-Rivera, J., & R.P. Jones. (2016, August 3). [Race, Religion, and Political Affiliation of Americans’ Core Social Networks.](#) *PRRI.*)

¹⁷ Indeed, there is increasing attention on the systemic challenges leaders of color face in philanthropy: connecting to funders, building rapport with them, securing funding, and maintaining longer-term relationships. (Dorsey, C., Bradach, J., & Kim, P. (2020, June 5). [The Problem with “Color-Blind,” Philanthropy.](#) *Harvard Business Review.*)

Mitigating Strategies

- **Expand your candidate pool and maintain a list of potential evaluators.** Invest the time and effort to look for evaluation firms beyond the usual suspects. Seek recommendations from a broader network and consult resources in the field. Potential resources include Expanding the Bench’s [ACE Evaluation Network](#) and [LEEAD Program](#) graduates, as well as the [Center for Culturally Responsive Evaluation and Assessment](#).
- **Be proactive in developing relationships with evaluators of color by becoming part of their network.** Networking at conferences, finding out about and highlighting the work of evaluators of color, regularly inviting evaluators of color to submit proposals, and maintaining relationships over time are all positive strategies. Expanding the Bench recently launched virtual coffee breaks as an opportunity for funders and evaluators of color to connect informally and develop personal relationships.

4. Funders ask the most senior consultants (who are predominantly white) to be the face of the work

Funders often expect to see the most senior consultants as the face of the evaluation. High-level evaluation staff typically present findings and lead discussions, and high-level staff often attend each client meeting, even if project-specific knowledge and expertise is mostly held by other team members. Seniority implies knowledge and experience, which in turn engenders trust, especially in high-stakes situations. Evaluators of color are more often the face of the evaluation with community members than with clients, and many feel pigeon-holed into community-facing data collection.

Client-facing opportunities can be vital to career advancement. They are opportunities to demonstrate knowledge and expertise, as well as develop personal relationships with clients who may offer connections to future projects and career opportunities. Without client-facing opportunities, evaluators of color can easily become siloed off from new opportunities and are often overlooked regarding credit and recognition. Importantly, evaluators of color find it challenging to build a reputation as a thought leader when their work has someone else’s name on it.

Mitigating Strategies

- **Budget your evaluations to allow greater inclusion.** How many and which evaluation staff members are included in meetings—client meetings, grantee convenings, etc.—is often a question of budget. Projects that ask evaluation firms to complete the work at the lowest possible cost may also be reducing the inclusivity of the evaluation team, which can limit the capacity and effectiveness of that team. Early-career evaluators of color cannot take on leadership roles and be the face of the work if sufficient budget is not provided to include them in strategic conversations.

- **Be open to fewer senior members of the team taking a lead.** Project leads have a strong sense of their team members' capacity and skills. If they suggest a team member for the presentation, be open to it and ask curious questions if necessary. Some funders assume a less senior member of the team in a lead role signals that the project lead is deprioritizing their projects. Check these assumptions, especially if they provide an opportunity for evaluators of color to take on client-facing roles.
- **Regularly and intentionally acknowledge individuals and the good work they do.** When projects succeed, we commonly direct credit and appreciation to the project lead. The larger team may experience little to no acknowledgement despite having devoted a substantial amount of time and energy to the project's success. This common practice devalues their contributions immensely, yet it is also easy to change if given intentionality.



Rethinking Common Practices Among Evaluation Firms

As employers and mentors, evaluation firms have a critical role in the development and retention of evaluators of color. They resource professional development for evaluators of color, help them navigate challenging dynamics of a white-dominant professional culture, and determine promotions into senior positions. We present three common practices in evaluation firms that erect barriers for evaluators of color and potential strategies to mitigate barriers.

1. Evaluators of color are often staffed primarily on projects when their race or ethnicity addresses a specific project need

When RFPs ask for an evaluation team that reflects the relevant community diversity, evaluation firms may not have enough evaluators of color to meet this demand given the scarcity of evaluators of color in the field overall.¹⁸ The dynamic can lead to stressful and unfulfilling experiences for evaluators of color as professionals and as people who care about their community. Examples of unhealthy scenarios that emerge from this situation:

- Evaluators of color feel they must carry the weight of communities of color on their shoulders.
- Evaluators of color are spread thin across projects, so much so that they cannot do their best.
- Evaluators of color feel tokenized for their racial and ethnic background and underappreciated for their skills and expertise as evaluators.
- Evaluators of color feel pigeon-holed, with little opportunity to take on projects based on interests or that build expertise beyond community representation.

Many evaluators of color have experienced these challenges at some point during their careers, and many navigate these experiences alone.¹⁹ Some evaluators of color decide to leave the field of evaluation as a result.

Mitigating Strategies

- **Confidentially and regularly solicit staff feedback and input about the firm's opportunity and support for evaluators of color.** Evaluation firms can find ways to obtain honest feedback from all staff, with special attention to the experiences of evaluators of color in your organization. This can be a staff engagement survey (such as [Gallup's Q12 Staff Engagement Survey](#)) or interviews conducted by a third party consultant. Be sure to close the feedback loop—what did you hear from the results and what will you do differently?²⁰

¹⁸The racial/ethnic composition of the American Evaluation Association's membership is as follows: 52% White, 8% Black/African American, 6% Asian, 5% Hispanic/Spanish origin, 1% American Indian, 4% more than one race, 4% other, 22% missing data. (*American Evaluation Association 2018 Member Survey Report*, October 2018)

¹⁹Mendoza, P. (2020, July 13). [Listening for Change: Evaluators of Color Speak Out about Experiences with Foundations and Firm](#). *Engage R+D*.

²⁰For example, see this model on feedback loops by Fund for Shared Insight: <https://www.fundforsharedinsight.org/learn-more/what-is-feedback/>

- **Ensure evaluators of color are connected to the support they need, including peer connections and mentorship.** Firms could be more intentional about building meaningful relationships with evaluators of color on staff and pay attention to their connectedness to others. This intentionality promotes an organizational culture that values and promotes diversity, inclusion, and equity. Do evaluators of color have the opportunity to build strong relationships with peers, especially other evaluators of color?²¹ Do they have strong mentors to help them navigate the challenges of this work either internally or externally?²² Evaluation firms should look for opportunities to connect staff of color to each other through working groups and social activities, and to others in the field through introductions and networking events.
- **Track and assess potential disparities in pay, benefits, access to high-visibility project work, promotions, and access to professional development.** Firms could regularly assess differentials in pay and benefits. Furthermore, it is important to pay close attention to who has opportunities to work high-visibility projects, in-person client meetings, field-building efforts, conferences, and networking opportunities.

2. It is taboo to discuss one's experiences with race and racism in a professional context

The norms and characteristics of white-dominant culture²³ are deeply ingrained in the evaluation and philanthropic sectors. They include an emphasis on perfectionism, sense of urgency, worship of the written word, paternalism, and right to comfort (avoidance of discomfort). White-dominant culture is so normalized and so invisible that many evaluators of color become convinced that following these norms is the only way to be successful.

White-dominant culture can weigh heavily on evaluators of color. Many evaluators of color experience feelings of exclusion and isolation, microaggressions in daily interactions, and disparate professional opportunity. Many find themselves navigating one critical question: "How much am I willing to change – how I present myself, my values and beliefs—in order to succeed in this field?"²⁴

Mitigating Strategies

Build an organizational culture and climate that acknowledges the unique challenges faced by evaluators of color and take responsibility for ensuring an inclusive work environment.

- **Host conversations about white supremacy culture characteristics, race, and racism in the workplace.** Establishing new norms is part of breaking taboos. Organizational leaders have a significant role creating appropriate spaces for these issues to emerge, reducing the perceived risk of coming forward, and ensuring that the burden of this work is borne collectively rather than only by people of color. Racial dynamics are inescapable and they exist in every workplace – acknowledging and addressing them in your own environment is an important place to start.

²¹ Having a best friend at work as an ally and confidante is an important predictor of staff engagement (Mann, A. (2018, January 15). [Why We Need Best Friends at Work](#). *Gallup*.)

²² Mertens, D., Moss, T., & Robinson, S. (2020, April 13). [A Mentor and Protégé Model: Strengthening Transformative Culturally Responsive Evaluation through Forming a Mutually Beneficial Relationship](#). *AEA*365.

²³ Okun, T. (n.d.). [White Supremacy Culture](#). *Dismantling Racism Works*.

²⁴ See also: Safdar, K. & Hagey, K. (2020, June 26). [Black Executives are Sharing Their Experiences of Racism, Many for the First Time](#). *Wall Street Journal*.

- **Create multiple entry points to the conversation including informal settings such as coffee talks, brown bag lunches, and peer-to-peer/one-on-one connections.** There will be varying levels of comfort in engaging—every person will have a complex mixture of feelings such as anger, embarrassment, shame, disappointment, and regret. Some people are surfacing experiences they have pushed deep for many years, and others may be trying to put their feelings and thoughts to words for the first time.²⁵ Be patient and create many ways for staff members to engage when they are ready.
- **Lead from the top—acknowledge white dominant notions of leadership and commit to making shifts.** Having a conversation may be the right starting point for change, but the struggles of evaluators of color will continue unless organizational leaders commit to dismantling white-dominant leadership norms and practices.

3. The most senior, often white, consultants lead client communications, particularly for high-profile projects

Client communications on high-profile projects are typically held by the most senior consultants on the project—other team members often lack the opportunity to participate, let alone take on a leadership role, in client meetings. When client interface is limited to a select few, early-career evaluators will not gain the opportunity to build skills in client management and eventually become the face of the work. Evaluation firms should be thoughtful about ensuring evaluators of color not only have opportunities for internal leadership, but also external leadership with clients and the field.

I'm sometimes asked, "Why are there so few people of color in evaluation?" I flip the question: "Why is evaluation so white?" And answer: "Because our labor is actively erased."

-Vidhya Shanker, PhD

Without client interface and presentation opportunities, evaluators of color often receive little credit for the work they do²⁶ and they find it challenging to leverage their expertise in service of their own development. Externally, evaluators of color, expertise, and the opportunities that come from their work, are tied to someone else.²⁷

²⁵ See also: Safdar, K. & Hagey, K. (2020, June 26). [Black Executives are Sharing Their Experiences of Racism, Many for the First Time](#). *Wall Street Journal*.

²⁶ This includes the work they do to prepare colleagues for client engagements – development of agendas, materials, and talking points – in addition to the evaluation work.

²⁷ Shanker, V. (2020, March 2). [The Invisible Labor of Women of Color and Indigenous Women in Evaluation](#). *AEA365*.

Mitigating Strategies

- **Empower evaluators of color to take on leadership roles and budget appropriately to allow for greater inclusion.** Leadership needs to be intentional about creating opportunities for all early-career staff members, including evaluators of color, in your client meetings (either regularly or for key meetings) and support them in taking on leadership roles in front of the client. If budget pressures are a limiting factor, broach the topic with funders in the budgeting process. These opportunities build the capacity of staff and bolster the quality of the work.
- **Invite team members to present and hear feedback directly from the client.** Two-way conversations are opportunities to build trust with the client. For staff new to client engagement, offer the opportunity to co-present and coach them on how to prepare for the meeting.
- **Acknowledge the contributions of individual staff and other stakeholders as a standard practice.** Acknowledgements can take place in a conversation or email with the client, or in an acknowledgements paragraph in a report. Silence further reinforces power inequities, erecting barriers to building one's professional reputation internally (for promotion purposes) and externally (for building one's reputation as an expert).

Rethinking Common Practices in Pathway Efforts

Pathway efforts have been a valuable support for many evaluators of color. With [Expanding the Bench](#) and the [American Evaluation Association](#) leading the way, there are several initiatives designed to draw more evaluators of color to evaluation and bolster the practice of culturally responsive and equitable evaluation. Pathway efforts help evaluators of color gain access, knowledge, skills, and support to enter and flourish in the field of evaluation. We outline two common practices in pathway programs and suggest ways to refine program approaches to better serve evaluators of color in philanthropic evaluation.

Pathway Efforts in Evaluation

- [Advancing Collaborative and Equitable \(ACE\) Evaluation Network](#) is a community of diverse evaluators whose mission is to drive and support the practice of culturally responsive and equitable evaluation.
- [Leaders in Equitable Evaluation and Diversity \(LEEAD\)](#) is a professional development pathway program for diverse leaders in culturally responsive and equitable evaluation.
- [Graduate Education Diversity Internship \(GEDI\)](#) engages and supports graduate students of color by providing paid internships and training opportunities during the academic year.
- [Minority Serving Institution Fellowship](#) directly outreaches to Minority Serving Institutions to draw more people of color into evaluation and into the American Evaluation Association.

1. Formal academic programs and pathway programs to evaluation do not reach students of color early enough

The field of evaluation has grown dramatically over the past few decades, and yet few people know what a professional evaluator does or what a career in evaluation could look like. Some evaluators enter the field formally through an academic evaluation program while others “fall into” evaluation though it was not their original field of study.²⁸ There are no current pathway efforts focused on raising awareness of evaluation as a viable and important career option prior to a graduate degree or practitioner level. Those who work at the intersection of evaluation and philanthropy can serve as ambassadors and mentors for this little-known field.

²⁸Accidental evaluators “come into evaluation with training in other disciplines and/or an understanding of philanthropy and learn evaluation while on the job.” (Luminare Group. (2020, May). [Moving from An Evaluator Pipeline to an Evaluation Ecosystem - Where We Are Now; What's Needed Next](#).

Mitigating Strategies

- **Start early and reach out to undergraduate programs.** Pathway programs can make connections with undergraduate programs to share information about the profession of evaluation. These are opportunities to share information about what professional evaluators do, what kind of training they have, what kinds of jobs they can get, and in what settings (e.g., organizations, government, philanthropy, independent consulting).
- **Introduce philanthropic evaluation to students in evaluation programs.** Working successfully in and with evaluation philanthropy requires skills and know-how that is seldom apparent. Many evaluation programs do not introduce students to the context of evaluation in philanthropy, the potential pathways to working with or in philanthropy, and the skills and competencies for success in this work. Highlight the different approaches and types of evaluation that can be conducted.
- **Identify venues to introduce philanthropic evaluation to students and programs.** Pathway programs could leverage alumni and mentor networks to connect with students and faculty in evaluation programs (e.g., be a guest speaker, organize a panel). There may also be opportunities to present at higher education conferences and speak with evaluation student groups (e.g., GEDI), or reach out to mentor networks to write a blog or commentary about your experiences in philanthropy (e.g., AEA Blog).

2. Pathway programs focus on traditional evaluation work and firms—in practicum experience and in the networking opportunities offered

Working successfully in and with philanthropy requires skills and know-how that one gains through on-the-job training and mentorship. Pathway programs can have a significant role in positioning evaluators of color to succeed in philanthropic evaluation by expanding practicum experiences and networking opportunities.

Mitigating Strategies

Practicum experiences (i.e., internships and fellowships) offer evaluators of color valuable opportunities to apply learning and build a professional network. In the GEDI and LEEAD programs, opportunities are typically at larger evaluation firms which conduct traditional summative evaluations, often for the public sector. Relatively few opportunities focus on the use of learning and evaluation to inform strategy—a purpose and approach more common in philanthropy.

- **Reduce the cost and burden for evaluation firms to host interns.** The resources (both time and money) required to host an intern can be prohibitive for many evaluation firms. Engage philanthropy to support the cost of program administration and reduce the participation cost of hosting interns of color for evaluation firms or grantee sites.

- **Engage evaluation firms to understand their barriers to participation.** Evaluation firms with expertise in philanthropic evaluation tend to be small and mid-size consulting firms. They may be reluctant to participate for a variety of reasons—resources (financial and human), ability to carve out a meaningful project, finding someone willing to host, etc. What are their challenges and how might pathway programs work with funders and other stakeholders to create richer and more diverse opportunities for evaluators of color?

Professional connections are critical—one gains access to mentorship, to job opportunities, and to the behind-the-scenes know-how that facilitates success. Pathway efforts such as the ACE Evaluation Network are important venues for evaluators of color.

- **Recruit more ambassadors and mentors who work in philanthropic evaluation.** Bring in experienced practitioners of philanthropic evaluation, particularly evaluators of color in philanthropic evaluation, to serve as mentors and host interns.
- **Host networking opportunities for early-career evaluators to connect with experienced evaluators of color working with philanthropy.** Opportunities could be co-hosted with a local evaluation firm or fit into the American Evaluation Association's annual conferences.

In Summary

Common Practices and Mitigating Strategies for Funders, Evaluators, and Pathway Programs

	<i>Common Practices</i>	<i>Mitigating Strategies</i>
Funders	RFPs ask for a scope of work and evaluation design upfront.	<ul style="list-style-type: none"> Alternative formats such as Requests for Information and Requests for Qualifications. One-on-one conversations in advance of a full proposal.
	RFPs ask for a diverse evaluation team as a proxy for cultural relevancy.	<ul style="list-style-type: none"> Articulate the need for cultural relevancy in addition to the racial and ethnic diversity of the team.
	Funders send RFPs to a limited number of firms based on past relationships and peer recommendations.	<ul style="list-style-type: none"> Expand your candidate pool and maintain a list of potential evaluators. Be proactive in developing relationships with evaluators of color by becoming part of their network.
	Funders ask the most senior consultants (who are predominantly white) to be the face of the work.	<ul style="list-style-type: none"> Budget your evaluations to allow greater inclusion. Be open to fewer senior members of the team taking a lead. Regularly and intentionally acknowledge individuals and the good work they do.
Evaluators	Evaluators of color are often staffed primarily on projects when their race or ethnicity addresses a specific project need.	<ul style="list-style-type: none"> Confidentially and regularly solicit staff feedback and input about the firm's opportunity and support for evaluators of color. Ensure evaluators of color are connected to the support they need, including peer connections and mentorship. Track and assess potential disparities in pay, benefits, access to high-visibility project work, promotions, and access to professional development.
	It is taboo to discuss one's experiences with race and racism in a professional context.	<ul style="list-style-type: none"> Host conversations about white supremacy culture characteristics, race, and racism in the workplace. Create multiple entry points to the conversation, including informal settings such as coffee talks, brown bag lunches, and peer-to-peer/one-on-one connections. Lead from the top—acknowledge white dominant notions of leadership and commit to making shifts.
	The most senior, often white, consultants lead client communications, particularly for high-profile projects.	<ul style="list-style-type: none"> Empower evaluators of color to take on leadership roles and budget appropriately to allow for greater inclusion. Invite team members to present and hear feedback directly from the client Acknowledge the contributions of individual staff and other stakeholders as a standard practice.
Pathway Programs	Formal academic programs and pathway programs to evaluation do not reach students of color early enough.	<ul style="list-style-type: none"> Start early and reach out to undergraduate programs. Introduce philanthropic evaluation to students in evaluation programs.
	Pathway programs focus on traditional evaluation work and firms—in practicum experience and in the networking opportunities offered.	<ul style="list-style-type: none"> Reduce the cost and burden for evaluation firms to host interns. Engage evaluation firms to understand their barriers to participation. Recruit more ambassadors and mentors who work in philanthropic evaluation. Host networking opportunities for early-career evaluators to connect with experienced evaluators of color working with philanthropy.

Closing Thoughts

In the wake of COVID-19 and the widespread public uprising against police brutality and anti-black racism, philanthropy is at a critical juncture in its evolution. Many foundation executives are calling for deep reflection and change in the field of philanthropy, and evaluation has a role in this change. Evaluation supports and informs who we listen to, what we believe should be measured, and what success looks like. The empathy and compassion that comes with the lived expertise of evaluators of color is critical—in both the practice of evaluation and the practice of philanthropy.

Our Action Team is grateful for the opportunity to reflect on the valuable role of evaluators of color in our field and what it will take to ensure that they flourish. Our group was small and not fully reflective of the variety of stakeholders and perspectives needed to have this conversation. Nevertheless, we hope this brief serves as a resource for people working to advance equity and justice more broadly within the fields of evaluation and philanthropy.

There is excellent work being done by evaluators of color everywhere to contribute to better results for diverse communities within the United States and across the world. To evaluators of color everywhere—you are not alone and who you are is an asset to our field. We will continue to advocate for your inclusion and success.

Acknowledgements

We acknowledge the dedicated individuals that contributed to this year-long effort. We would also like to thank our core team who stuck through many deep discussions and many rounds of writing and review:

Theresa Esparrago Lieu, Informing Change
Kelly Hannum, Aligned Impact, Luminare Group
Nathan Madden, Ewing Marion Kauffman Foundation
Subarna Mathes, Ford Foundation
Jessica Xiomara García, Learning for Action

The work also reflects the contributions of:

Andrea Cobb, Bill & Melinda Gates Foundation
Nadine Dechausay, Communities Foundation of Texas
Elena Harman, Vantage Evaluation
Jasmine Haywood, Lumina Foundation

Last but not least, we would like to thank the FEAN team members who have supported our Action Team along the way:

Altinay Cortes, PEAK Grantmaking (formerly with Equal Measure)
Pilar Mendoza, Engage R+D
Clare Nolan, Engage R+D