Strategies 2.0

Inclusion through Evaluation:

A Toolkit for Practitioners and Leaders

Organizations that work with vulnerable populations have a responsibility to understand barriers encountered by those groups, create opportunities for their inclusion, and identify internal structural hurdles that perpetuate the inequity cycle. One way to accomplish this goal is to foster an organizational culture centered around diversity, equity, and inclusion (DEI).

The goal of this toolkit is to leverage evaluation to bolster DEI in an organization's day-to-day work and encourage data literacy by demonstrating how we all play a role in creating an equitable evaluation culture. Since so much of evaluation work is centered around data, the DEI Evaluation Toolkit does this by improving data literacy throughout an organization.

Data literacy is the ability to understand, discuss, and verify data. To increase data literacy, practitioners and organizational leadership must develop skills in these areas. The Toolkit is a guide to increase data literacy and awareness of equity for varying experience and capability of staff.

DIVERSITY

Staff with different expertise have opportunity to review and comment on evaluation results

EQUITY

Unbiased evaluation findings that accurately represent the studied population

INCLUSION

Relevant demographics get included in data collection, analysis, and reporting

By following the outlined steps, organizations can achieve higher quality data, understand the importance of data accountability, and actively engage with the data. Without data literacy, there could be no diverse, equitable, and inclusive culture (DEI). (See Figure 1). As a result of increased data literacy, organizations are more likely to produce evaluations with demographically inclusive data and unbiased findings that encourage inclusivity of the needs of the vulnerable populations.

This Toolkit is created for practitioners who collect data and for leaders who work with the evaluator/analyst and/or consume the data reports. The following elements will explore how DEI appears in evaluation, who is responsible for different elements of DEI growth, and the practical steps to expand DEI culture.

No one formula results in a DEI culture. Ideally – via evaluation – the DEI lens is first applied during the brainstorming stage, before any templates are created or collection is begun. Following the brainstorming stage, it is important to apply the DEI lens when analyzing unbiased findings, when reviewing findings through staff input, and when sharing the results. Below is the 'what,' 'why,' and 'how' DEI lens may appear in evaluation (See Figure 2).
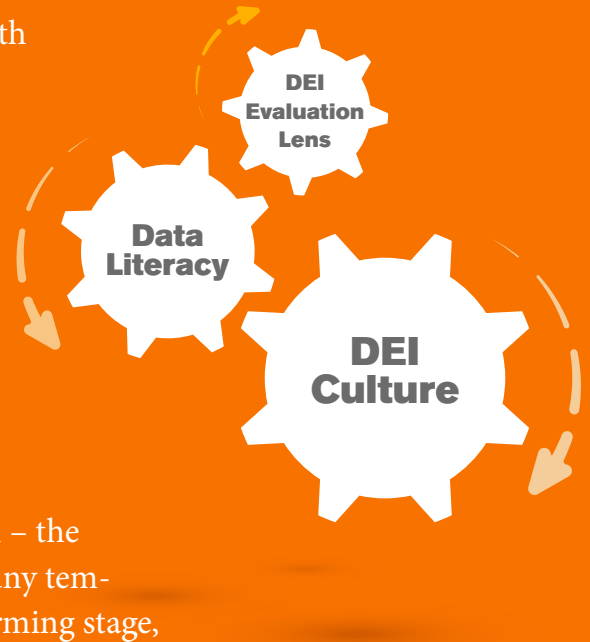

DEI Evaluation Lens

Data Literacy

DEI Culture

Figure 1

Inclusive Data	Unbiased Findings	Diverse Staff Input	Widely Shared Results
What: Relevant demographic data	**What:** Correct groups analyzed and reported	**What:** Staff has opportunity to review the findings	**What:** Results are shared internally and externally
Why: To understand how the program affects different sub-groups	**Why:** To get relevant analysis for program development	**Why:** To catch any oversights and to improve depth of findings through diverse feedback	**Why:** Promote DEI by sharing evaluation findings
How: Think about including sex, gender, race, work experience, education, etc.	**How:** Identify whether the data is collected on the correct groups, and entered accurately	**How:** Share the preliminary findings with staff who work on projects analyzed in the evaluation	**How:** Ask partners and colleagues to share your final work product

Figure 2

The remainder of this toolkit unpacks the data responsibilities and nuances of how to apply the DEI lens. Some of the DEI lens responsibilities are split between organizational roles, while others are shared. To clarify who is responsible this toolkit is divided into two sections:

1 For practitioners who are actively involved in data collection and

2 For leaders who direct the analyst/evaluator and/or consume data reports.

Check the list below to see which category you fall under. You do not have to fully identify with each category to benefit from this guide. Also, the practitioner and leadership roles are not mutually exclusive – the same person may wear both hats. If that is the case, please use both sections of the toolkit.

PRACTITIONER

LEADERSHIP

RESPONSIBILITIES

PRACTITIONER	LEADERSHIP
▶ Collects and/or generates data	▶ Identifies issues that data collection will answer
▶ Enters data into templates	▶ Applies critical thinking to evaluation/analytical reports
▶ Works with analyst/evaluator to transfer the collected data*	▶ Works with analyst/evaluator to understand data results
▶ Reads completed reports	▶ Confirms accuracy and fidelity of final report
▶ Distributes final reports internally and externally	▶ Distributes and presents final reports internally and externally

*Not all organizations have an evaluator or an analyst. If this is the case for your organization, please use this toolkit to strengthen the data collection and reporting portions of your evaluations.

To get the most benefit, this toolkit should be used repeatedly. Any time there is an opportunity to work with data and/or evaluation, the practitioner and leadership should consult the toolkit. Each iteration should improve your data literacy thereby strengthening equitable evaluation culture.

Section One. Practitioner's Guide

Importance of Data

Data is everywhere. Chances are you are already asked to collect and submit data on regular basis as part of your job. It comes in all shapes: submitting your project's progress, collecting participant forms, or filling out a survey. The need for data has required program managers, directors, and social workers to be data collectors. Without your data collection efforts, the programs could not improve and reports could not be submitted. As a data collector, it is important to be aware of how your data collection affects program outcomes.

Data collection efforts have direct impact on the data quality. That in turn affects the quality of information gathered from the analysis and later decisions made to decide programmatic outcomes (See Figure 3).
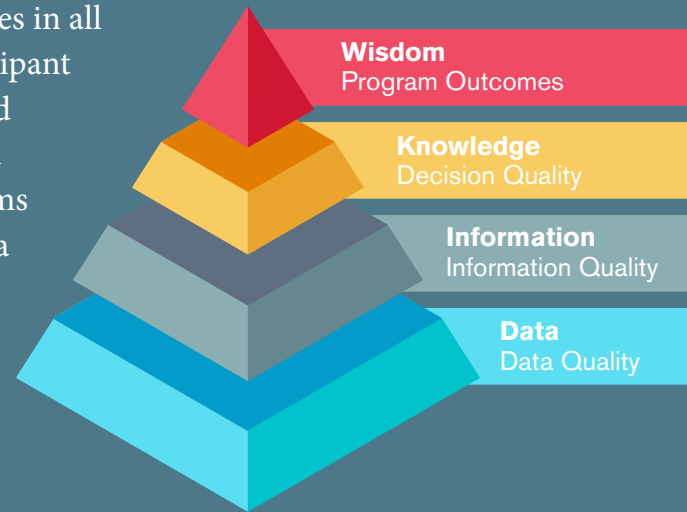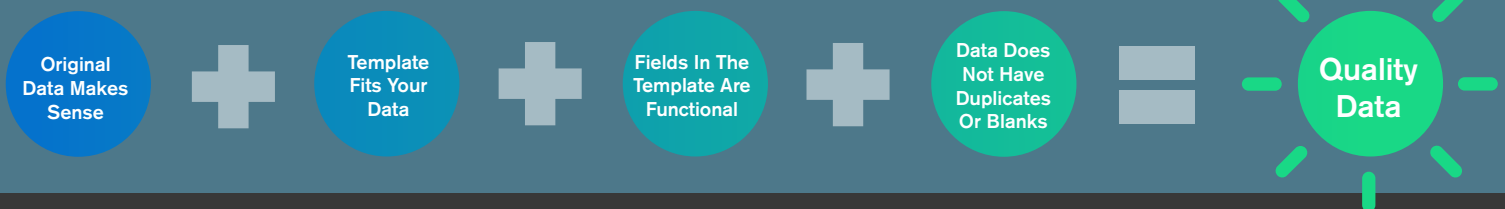
Wisdom
Program Outcomes

Knowledge
Decision Quality

Information
Information Quality

Data
Data Quality

Figure 3

Data Quality

Data quality is the foundation of all evaluation results (See Figure 3). Still, organizations typically ignore weaknesses of data quality, relying on analysts who work with data second-hand to correct mistakes. That is not only inefficient, but risky, as analysts often may not know the data as intimately as the collectors. Each person who interacts with data has the opportunity to improve its quality.

Therefore, data quality must be a shared responsibility that affects the entire organization.

The reports generated from the data you collect are only as good as the data you submit. The most complex analysis and best visualizations are useless if they are based on poor data. So it's of utmost importance to strive for quality data, and promote "quality in and quality out."

Original Data Makes Sense **+** Template Fits Your Data **+** Fields In The Template Are Functional **+** Data Does Not Have Duplicates Or Blanks **=** **Quality Data**

The Practitioner's Tool on the next page will help you improve the quality of your data.
Use the Practitioner's Tool on the next page when:

- Collecting your data (spreadsheets, templates, surveys, etc.)
- Checking collected data
- Submitting checked data
- Reviewing report quality

Collecting New Data

Checking Collected Data

Submitting Proofed Data

Reviewing Report Quality

➧ Data collection form makes sense

If using a form (e.g., pre-post test, survey, questionnaires) to collect information, think about whether it makes sense. Does it make sense from your practitioner point of view?

If not, reach out to the evaluator/analyst that created the form for potential changes.

Example: The training was done on Trauma-Informed Care. But the pre/post test has questions on Father Engagement.

➧ Collected data makes sense

Carefully look over the collected data you are about to enter. Does it make sense? Look for any data that seems like it may not belong – it seems too large or too small. Ask yourself if it seems reasonable.

If it doesn't seem reasonable, try to correct the data. If you can't correct it, leave the bad data out.

Example: You are tracking the number of consulting hours spent on a project. A consultant wrote that they spent 50 hours consulting last month. The average for the rest of the projects is 2 hours. This may be a mistake and needs to be reviewed.

➧ Template fits your data

Before entering the data, look through the template you are using to enter your data. The fields should accurately capture your data.

If it does not accurately represent your data, contact the analyst/evaluator to alert them of the problem.

Example: You are tracking project hours, but the template is tracking weeks.

➧ Fields in the template are functional

Make sure you are able to enter the data into the fields. If you click on the cell or field and are unable to enter the data, or it converts your data into something else, then alert the analyst or evaluator to this problem.

➧ Data does not have duplicates or blanks

Now that you entered your data, look over it again. Make sure you did not double-enter the same information twice, or left certain fields blank.

If you have another colleague able to help, ask them to look over your data. A second pair of eyes is great for catching errors.

➧ Know your deadlines

Data needs to have a timely turnaround to be relevant. Keep track of the deadlines. Put them on your calendar to remind yourself.

If you aren't aware of any deadlines, ask the analyst/evaluator if there are deadlines you are not aware of or work with them to develop deadlines for data submission together.

➧ Review reports based on your data

The reports should reflect what you submitted. High quality data that is not translated to high quality information will not result in useful program decisions.

Potential red flags can be:
• Information you did not collect
• Conclusions not supported by what you see in the field
• Missing information from the report

Example: The report has no discussion of the sex and race data that you included in your template. But it discusses the educational background of the responders - which you did not collect. These findings need to be addressed with the report author.

➧ Contact the Evaluator/Analyst to give feedback

If you have questions about the report, make sure to contact the responsible individual to make corrections.

Section Two. Leadership Guide

Data-driven Leadership

In this day, leaders have access to a broad range of data – reports, test results, focus groups feedback and so forth. Incorporating data into your program planning and decision making gives you an extra edge in the field. To be an effective leader in today's organization, leaders must know how to understand data. It is insufficient to defer to an analytics team. Rather, a leader must be able to discern where data adds value, how it affects different populations, and ensure transparent organizational data sharing. A leader must closely work with the analyst to support their work, strategize data collection, and involve data collector staff in report quality review.

To ensure that the DEI lens is consistently applied in evaluations, the leader must be involved from the initial stages of data brainstorming to the distribution of final reports. The importance of this cannot be overstated because each stage provides for an additional chance to apply the DEI lens (See Figure 4). The DEI aspects of evaluation are sprinkled throughout the planning, data analysis, and reporting stages. The Toolkit gives general guidance on how to spot nuances of DEI in your evaluations. However, each leader will identify additional opportunities within their own work.

Planning

▶ Strategize data collection

▶ Include relevant demographics

▶ Consider diverse needs

Planning your research/evaluation

This occurs before any data is collected. It will guide data collection.

It is a time for embedding inclusivity and needs identification in your research.

Data Analysis

▶ Identify omitted information bias

▶ Identify response bias

Reviewing data

This happens when the data is collected, after the analyst has completed their analysis, but before a report is written.

It is a chance to identify bias and get a better understanding of data generation.

Reporting

▶ Be congnizant of groups affected by results

▶ Encourage diverse staff input

▶ Share your reports

Finalizing reports

This happens after the report is written but before it is finalized.

It is an opportunity to include more staff in institutional learning and pivot programmatic course.

Figure 4

Planning

Data Analysis

Reporting

Planning

Strategize data collection

Before starting the evaluation, be clear why you are collecting this data and how you plan to use it. Data collection needs to be strategic to be useful.

Lead the way

Do not expect the analyst to take the lead. Ultimately it is the leadership that identifies which processes need to be tracked and what problems need to be solved. Therefore, leadership should play a central role in identifying what needs to be measured.

Plan for inclusivity

Think ahead of time which demographics are important to capture in the data collection. Things like sex, gender, and race can make an important difference in your results and understanding your interventions.

Example: Population served is primarily Native American and female, who are disproportionately subject to high rates of violence. An effective evaluation should include those aspects in the analysis.

Diverse needs

Consider the questions and/or processes that may need to be tracked for one group but not another.

Example: Only executive-level personnel receives executive training. Do not ask mid-level staff about executive training needs in the survey.

Make sure the analyst/evaluator is aware of them and creates instruments to track them.

Data Analysis

Understand data generation process

Familiarize yourself with the datasets the analyst uses.

Identify where the data comes from. It is impossible to judge the quality of data analysis if you don't know where it's from. Make sure the analyst is using an appropriate data source to answer program and intervention questions. If it is difficult for you to identify the source, work with the analyst to clarify that for you.

Use your expert knowledge

Look at generated data reports with a skeptical eye. Ask yourself if they make sense from your expert point of view. There is a tendency for leadership to perceive data results as stand-alone truths. But there is a real danger in assuming data collection and analysis was done in a fool-proof way. Make sure the results make sense in a larger context.

Identify bias

On a fundamental level, analysis is all about comparisons. Ensure your analytics team is making correct comparisons based on the inclusivity efforts you made earlier. Identify response bias: Make sure the people that are in your analysis are representative of the population. Find omitted information bias: Confirm there are no critical attributes missing in the analysis.

Example: The training has low attendance rates without a clear reason. The analyst did not compare results between those who have a car and those that don't, and does not know that this is a low-income population. This is omitted information bias.

Reporting

Data-driven decision making

Failures are opportunities for learning. Openly discuss both successes and failures of the program. Steer away from preoccupation with success, because it impedes learning.

Be cognizant of groups affected

Understand what group is going to be affected by your decision based on the results of your data.

Example: As a result of your online survey indicating that people prefer digital training, you decide to move most of your courses online. Now participants with no internet access at home are less likely to benefit.

Use data to change course

Be open to altering your programmatic course of action based on the results.

More eyes on the findings

Previously undetected mistakes may be caught by someone who has particular insight into a small piece of data.

Opportunities for questions

If DEI evaluation culture is to succeed, everyone should have the right to question outcomes.

Share your reports

Make sure the reports are shared across the organization. Widespread sharing of the reports allows everyone to learn and add value across the board.

Strategies 2.0

Strategies 2.0 is a partnership between The Child Abuse Prevention Center, Children's Bureau of Southern California, and the San Diego State University Social Policy Institute.
As a collaborative effort, Strategies 2.0 is committed to: (1) growing the capacity of the family and community strengthening field to deliver high-quality services; and (2) partnering with communities to transform the conditions in which families live.

The Social Policy Institute (SPI) at San Diego State University is responsible for Continuous Quality Improvement (CQI) for Strategies 2.0. SPI has designed, developed and implemented replicable data systems based on diversity, equity and inclusion. Central to CQI and evaluation is the use of data to improve performance as detailed in this toolkit.