Culturally Responsive Consultancy (CRC) Guidelines

The American Evaluation Association (AEA) has developed a public statement on cultural competence in evaluation (http://www.eval.org/p/cm/ld/fid=92) that we believe should guide our work. **The Culturally Responsive Consultancy (CRC) guidelines in this document pose a set of questions to help Equal Measure individuals and teams take a step back, examine, and safeguard against our own biases as evaluators and consultants**. These guidelines intend to help us reflect on our own cultural positions and foster an awareness of others' cultural positions.

As responsible evaluators and consultants, we have an obligation to consider the impact that culture and specifically race have in the social initiatives that we evaluate. By seeking to implement consultant practices, and particularly evaluation, through a culturally responsive lens, we seek to promote equity, but also minimize harm. Ultimately, by ensuring that issues of power and culture are raised and addressed, we believe that we can help to support greater impact in the investments we evaluate.

These guidelines are organized according to various stages of project development: (1) identifying new work, (2) getting work, (3) doing work, and (4) reporting on work.

We have identified three themes that thread throughout the guidelines. These include:

1. **Identify Population/Community Project Diversity and Dynamics:** Who are the communities, organizations, and/or institutions involved in this work? What is the demographic composition of the community or communities? What are the power dynamics in the community or communities? Who is marginalized in this community? How do these factors have the potential to influence program impact?

2. **Consider Equal Measure Capacity and Biases:** How will we as a consulting team be perceived in this community? What capacities does Equal Measure need and what do team members bring to address project-specific questions of race, culture, and equity? For example, does Equal Measure need to include team members with specific language skills or familiarity with specific communities, e.g., faith-based communities? How can we identify gaps in capacity and existing team biases? What steps can we take to reduce team biases and address gaps?

3. **Set and Revisit Realistic Goals for Incorporating CRC into All Work Phases:** What are realistic goals at each stage of project work – identifying, getting, doing, and reporting on the work – for incorporating an explicit focus on race, culture, and equity? How might opportunities arise for explicitly versus implicitly focusing on issues of race, culture, and equity over the course of a project? How might these issues impact the project's outcome?

Updated July 2015

Identifying New Work: Connect to new clients and projects that value Equal Measure's cultural focus

✓ **Identify clients and projects in synergy with Equal Measure values to elevate race, culture, and equity**
- What conferences, forums, or online spaces offer opportunities for meeting and linking to potential clients who value a culturally responsive lens?
- How can we highlight Equal Measure's culturally responsive lens from past projects to develop CRC-related marketing pieces and/or information to continue developing relationships?
- What other ways can we stay connected to clients that value CRC so that we stay on their radar for when new projects emerge?

✓ **Evaluate the RFP (or other information that Equal Measure has about the potential project)**
- Do the RFP materials explicitly refer to race or equity in any way? Are issues of race or equity implicit? If not, why do we think that is? Would explicit naming and problem definition add value?
- Are data about the communities of investment included in the proposal? If not, how do we ascertain them?
- What do we know about the funder (foundation, intermediary) and their approach to race and equity? Is this a value of the funder? Is it explicit in their work in any way?
- How might this assessment of race/equity inform our approach, e.g., can we steer and/or develop client thinking about race and equity through our proposed scope of work?

✓ **Assess Equal Measure's qualifications to deliver the work**
- Is this work aligned with Equal Measure's values?
- Does this work fit Equal Measure's current CRC and content/field capacity, including skills and staff availability?
- Do we need to partner with consultants or another organization to strengthen capacity, specifically develop our knowledge of a community or enhance our ability to execute specific culturally responsive methods in a more rigorous way?

Getting Work: Design proposals that demonstrate Equal Measure's commitment to CRC

✓ **Utilize questions from the Race Matters Institute to consider, frame, and demonstrate understanding of the cultural context in the proposal**
- Who are the racial/ethnic groups in the communities of investment?
- Do current disparities exist by race/ethnicity around this issue or closely related ones Do we have any hypotheses about why these disparities exist? How does the proposed initiative interact with those dynamics?
- In the proposed initiative, what strategies is the client proposing and how do we think these strategies might be perceived by different groups in the area?
- Are the voices of all groups affected by the action at the table?
- Is the proposed strategy likely to close the gaps in racial disparities in culturally appropriate, inclusive ways? If not, can we utilize our proposal to elevate potential shifts in thinking about the initiative?

✓ **Incorporate CRC into proposed project methodologies and scope of work**

- To what extent does the funder need to be educated about a CRC approach?
- Does the proposed research plan provide space for further "getting to know" the racial dynamics in the communities of investment in which we will be working?
- Do methods include a diverse and representative group of participants and players?
- How will methods, deliverables and presentations support clients in collecting race appropriate data and considering the role of race, culture, and equity?

Doing Work: Implement a culturally responsive approach in our project work

✓ **Reflect again on the scope of work (now that we have the project), using a CRC lens**
- Does the proposed Equal Measure project team incorporate a mix of perspectives and skills that align with the project and minimize team biases?
- Do the proposed evaluation/consultancy questions adequately capture issues of race, culture, and equity? Are there sub-evaluation questions that need to be made more explicit?
- Do the proposed methods allow for the capture of authentic diverse perspectives? For example, individuals that exist at different levels of the community power dynamic, specifically, groups marginalized in the community?

✓ **Take time upfront to listen and learn about the community**
- What characteristics and trends do lead stakeholders highlight about the current community? To what extent do they include or exclude details about the racial environment and dynamics?
- Who else outside of those immediately involved in the project can help round out understanding of the current racial environment and dynamics in the community?
- How does this understanding of the community inform the approach of the evaluation questions and methods moving forward?

✓ **Include community in an ongoing way**
- Is there a role for an advisor from the community to: (1) help us continue to track important contextual changes, and (2) inform our analysis and interpretation results?
- What other strategies can we use to maintain a robust understanding of the changing context in the community, especially as it relates to race and equity?

✓ **Ensure data collection protocols and instruments ask questions about race and equity**
- Do protocols include questions/probes that explicitly mention race and/or equity?
- Are questions phrased in language that is understood and appropriate in the communities we are working?
- Do quantitative data tools capture information about progress according to race, income, and ethnicity?

✓ **Plan to field data collection instruments in ways that consider cultural difference and style**
- What is the best way to deliver protocols/instruments to ensure that responses and response rates are of the same quality across interviewees/participants?
- How might questioning or conversation style impact the quality of responses when conducting interviews?
- How might the makeup of the Equal Measure team influence different responses from different research participants and what strategies can be put in place to minimize these differences?

✓ **Ensure that data analysis and interpretation responsibly consider the impact of culture and race**
- Do analysis plans include specific plans for highlighting findings about race, income and equity?
- Do analysis plans consider the impact that race and culture play across other findings that might not be explicitly about race and equity?
- What cultural context might we be missing in our analysis and interpretation of results?

Reporting on Work: Incorporate culturally responsive lens in the delivery of evaluation results

✓ **Revisit initial analyses about cultural context and consider impact through culturally responsive lens**
- How has the initiative been perceived by different groups in the community?
- Have all the voices affected by the action been at the table?
- How have racial/ethnic trends and/or disparities shifted since the beginning of the initiative? How might the initiative have impacted any shifts?

✓ **Offer findings and recommendations that are explicitly about race and equity**
- How can we use products and deliverables to raise questions and findings about race, culture and equity most effectively?
- How does this progress connect to the specific problem the grant is seeking to address?
- Are findings and recommendations conveyed in language that will be understood by clients and grantees?

✓ **Facilitate conversations with clients and grantees that include race and equity considerations**
- What are realistic goals for a conversation about race and equity?
- Who are the stakeholders that need to be in the room to have productive conversations about race and equity findings?
- How comfortable are clients and grantees with discussing issues of race and equity explicitly?
- How might the client help co-create and support the conversation?