

Equity-centered evaluation of international cooperation efforts: the urgent need to shift unfair power dynamics

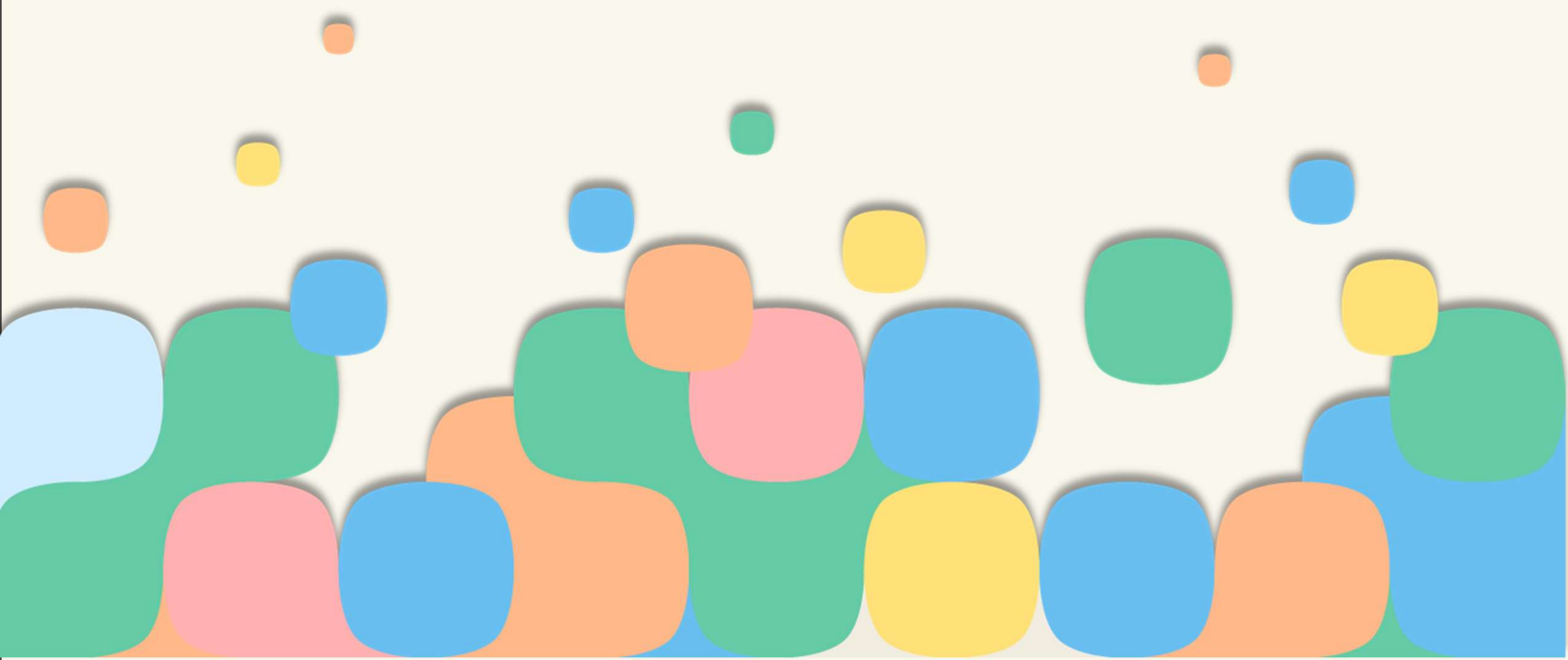
A report summarizing the findings from the study “Landscape analysis to inform international evaluation in the service of equity,” commissioned by the Ford Foundation

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EXECUTIVE SUMMARY

There is one main conclusion from the South-led research process: the way that international cooperation initiatives are evaluated perpetuates structural and historical inequities at the global, regional, national, and local level. These injustices are –proactively or subtly– reinforced by institutional day-to-day decisions regarding how evaluations are designed, funded, commissioned, implemented, and disseminated worldwide.

In this research, we applied a **power-aware analytical lens**, approaching the exchange process using 21 **reflective questions during interviews to more than 88 individuals from 81 organizations**. The interviewees have varied decision-making power and evaluation experience in the evaluation ecosystem: some fund and commission evaluations, others are subject to evaluations or carry out evaluations following standardized templates. By listening to these diverse voices in the Global South and North, one key objective was to deconstruct the multiple understandings of “equity in evaluation” while capturing how some actors in the evaluation ecosystem overcome concrete barriers to achieving equity.

In this process, key donors –from governments and multilateral organizations, to philanthropic organizations and other funding mechanisms– confirmed that evaluations are systematically excluding, invisibilizing, and discriminating against specific groups of people. However, not all donors seem to be fully aware of how certain decisions –from the recruitment of the evaluators, the choice of a methodology, to a funding timeframe, among others shift – in fact favor or are a detriment to equity and justice. Inequity is the result of concrete decisions. Still, for multiple reasons, donors seem to be repeating certain behaviors and replicating organizational ways of working, thus not opening the way for voice and power.

At the same time, the Global South civil society, the representatives from social movements, the evaluators, and the governments interviewed confirmed and explored in more depth what “equity/ inequitable evaluation” is in their view. They openly explained how exclusion happens and their “suffering,” in part because of the way the evaluation industry operates. Both Global North and Global South actors recognize that change is happening on a case-by-case basis rather than with the systemic, decisive, and inclusive approach required.

Overall, in this summary report, we describe the evaluation ecosystem, specifically highlighting **who are those systematically excluded in the evaluation process, and how this exclusion happens at different levels**. This way, we distinguish specific levels of responsibility that need to be taken into consideration to radically transform the evaluation industry. Each one of us can choose to seize concrete opportunities to encourage critical learning that leads to the creation of emancipatory knowledge and the promotion of mutual accountability. This is extremely important in an increasingly multipolar world, as the international cooperation scenario is finally becoming more aware of the need to overcome neo-colonial approaches to international cooperation.

As we describe how exclusion happens within the evaluation ecosystem, and in order to encourage a change toward equity, we also present some **preliminary guiding questions that donors interested in promoting equity could answer on a day-to-day basis as they make decisions when commissioning an evaluation**. We hope that the examples provided, coupled with the questions included in this report, will help bring about opportunities to inspire a power shift.

Furthermore, this report briefly introduces some efforts to transform the inequitable status quo. They are presented as “journeys of change,” and they are gaining momentum. However, these efforts are still limited and face multiple and complex barriers including dispersion, lack of funding, the North capturing the narrative and spaces and

platforms that could lead to change, and the slow pace to modify institutional arrangements that perpetuate the concentration of power in a few, among many other barriers. At the risk of giving rise to discouragement, we need to highlight a significant number of barriers identified during the data collection process. They are surely well known to most potential readers of this report –in particular, to those “victims” of evaluation practices that are characterized as extractive, imposed, and disempowering. However, as mentioned above, we would like this report to inspire action for equity-oriented change. We acknowledge this is only an initial mapping –the beginning of a process to recognize that we all share the same vision to hopefully, then, strive to unite forces for the inclusive transformation of the evaluation ecosystem. We understand that in the potential subsequent iteration of this action-research, it will be necessary to showcase a few case studies of organizations and networks working passionately to redefine how investments are made and their evaluations conducted. After all, and against all odds, the vision and call for equity, localization, shifting power and decolonization –especially among Global South actors that are exhausted of being instrumentalized to generate information and knowledge for the benefit of a few and mainly according to the parameters of Global North actors– is strong and inspiring. This is only the beginning of an ongoing process.

Looking at the emerging findings, we can confirm that an **ecosystem approach to transforming this status quo is urgently needed**: Global South and Global North actors must commit to long-term work to enter the ecosystem from diverse angles, mobilizing and catalyzing both small and big opportunities for change. Furthermore, it seems especially relevant that donors –those bearing more responsibility regarding day-to-day decisions on funding and evaluating programs– embark on an ongoing soul-searching path aimed to substantially modify concrete ways of working: including revising evaluation standards and approaches to methods, recruiting decisions, and priorities that keep many groups discriminated against, silenced, and at the periphery of learning processes that should bolster justice and democratization.

Arguably, and if we consider voice, participation, and power-sharing as key pillars of democracy and social justice, we could infer that exclusionary evaluation practices are jeopardizing the exact same objectives that funded programs are striving to promote. We started this process convinced that more equitable evaluation promotes justice and democracy. This report aims to be instrumental in raising awareness about the magnitude of the problem and the massive effort that must be done if equity is to become a fundamental guiding principle for evaluations.

The Southern action-research organizations co-leading this process are eager to facilitate the move toward equity. We trust that this report encourages real action and creates the conditions for enhanced inclusion, voice, shared power, and transformation.

We hope this will be a useful tool for all those that are ready to strive for equity, justice, and democratization in our world.

INTRODUCTION AND PURPOSE OF THE LANDSCAPE STUDY

In July 2022, Global Change Center and Praxis were selected as the leading organizations to develop and implement a South-led participatory study called “Landscape Analysis to inform international evaluation in the service of equity,” commissioned by the Ford Foundation.¹

Praxis and Global Change Center presented a proposal to undertake this research because of the Ford Foundation’s commitment to be part of a paradigm shift, particularly within evaluation policies and practices. This shift would allow the most excluded and historically oppressed peoples, specifically those in the Global South, to play a central role in determining the impact and value of any program, policy, or initiative developed in “their name” and for “their development.” We appreciate the Ford Foundation’s efforts to recognize and value multiple voices, knowledge, and perspectives by promoting localized and emancipatory evaluation methodologies at all stages of the grantmaking and programming cycle.

Global Change Center and Praxis work was based on the premise that there are power imbalances deeply embedded in the international cooperation evaluation ecosystem which stand in the way of achieving the commonly accepted goals of equity and social justice. It is essential to understand how power hegemony is sustained in order to smartly promote its dismantlement. Considering our principled approach of locating this study within the Global South leadership, we proposed conducting a South-led action-oriented assessment in collaboration with outstanding Global South partners in Latin America, Africa, and Asia. Thus, we worked in collaboration with six other Global South partners, namely: the Latin American Faculty of Social Sciences (FLACSO) and Fundación SES (Sustainability, Education and Solidarity) in Latin America; Gender and Equity Network South Asia (GENSA) and North South Initiative (NSI) in Asia; and Women for a Change and Institute for Global Dialogue in Africa. This approach helped us hear diverse voices across the regions.

We developed this landscape by centering the perspectives, ideas, and information provided by a diverse group of stakeholders working in the international cooperation field all around the world. This includes donors and commissioners of evaluations on the “demand side,” and researchers, evaluators, and civil society organizations (CSOs) on the “supply side.”

The main objectives of the landscape analysis are as follows:

1. Map the current state of demand for equity-oriented evaluation by commissioners of evaluations in international development and social justice initiatives
2. Identify gaps and opportunities to increase the demand and supply of equity-oriented evaluations undertaken as part of international cooperation initiatives
3. Harvest ideas to increase the demand among international development funders that commission equity-oriented evaluations

¹ This evaluation was commissioned by the Ford Foundation. However, its contents do not necessarily represent the views of the Foundation. Consistent with its tax-exempt status under Section 501(c)(3), the Foundation does not engage in political activity or lobbying as defined by the Internal Revenue Code. The Foundation may award grants to organizations that engage in policy advocacy work, including general support (unrestricted) grants that are not earmarked for lobbying but which grantees may use for lobbying or other advocacy work as permitted by law.

We harvested data, insights, and perspectives on the “demand side” (donors) of evaluations and the “supply side” (evaluators, CSOs, and Global South governments). Altogether, we interviewed 57 individuals from 50 organizations and held focus group discussions with 31 individuals from 31 organizations/networks. We then contrasted, compared, and aggregated information and emerging findings during horizontal online and offline learning sessions bringing together our partners, their diverse teams, and, in some instances, the Ford Foundation Office of Strategy and Learning. During a few iterations, we revised global as well as regional report drafts. This final report summarizes the most salient findings of this process, including a few opinions that we consider sufficiently relevant to be openly shared.

The study was not intended to be exhaustive, but rather a ‘provocation’² for dominant players in the evaluation ecosystem to reflect on power imbalances and tread a path forward according to various contexts.

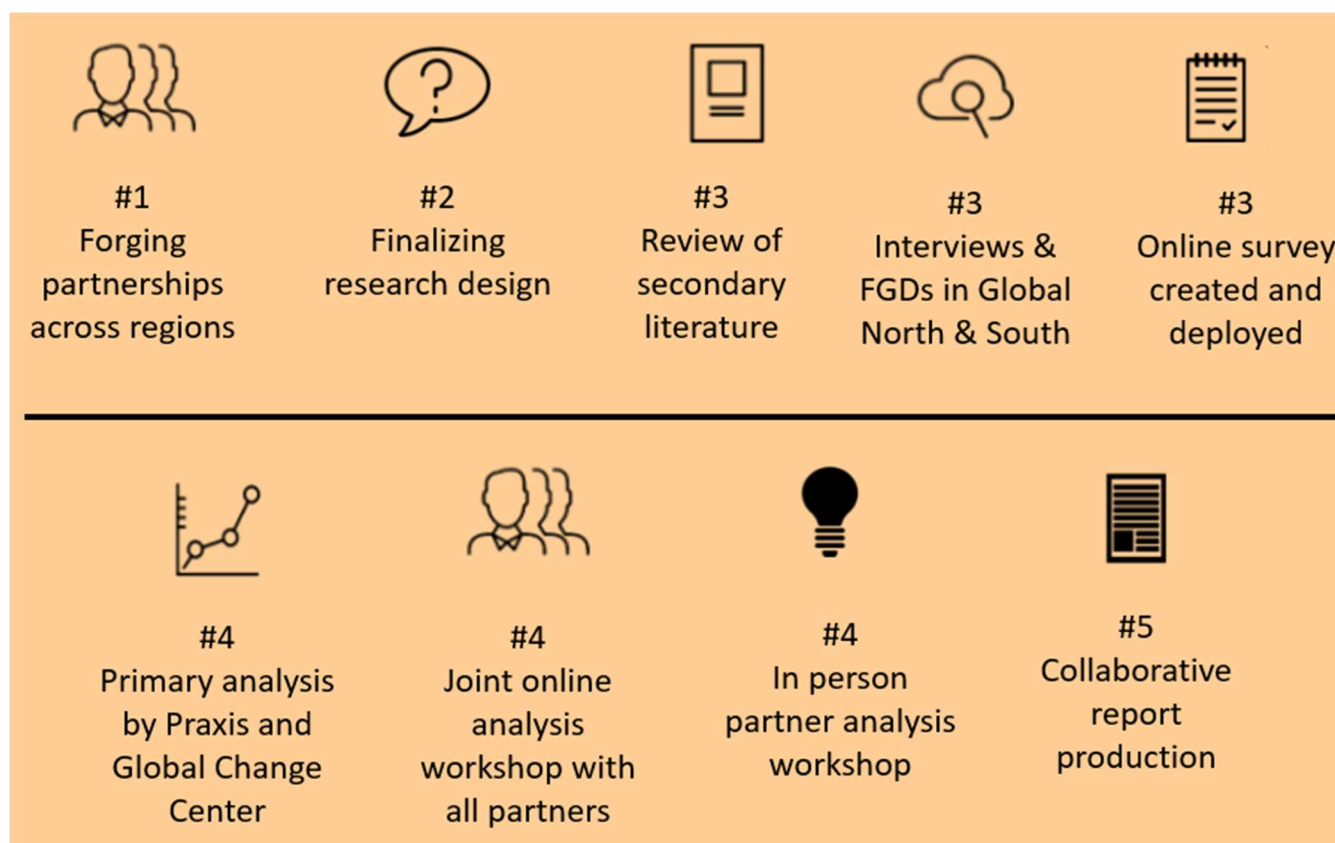
We hope that the key initial findings will help build on the global momentum around equity-oriented evaluation by advancing the understanding of the current situation relating to evaluation in international development and social justice initiatives.

STUDY PROCESS

The chart below details the study process so far:



² *Provocations for Development* is a collection of writings that question concepts, conventions and practices in development produced by Robert Chambers and published in 2012.



LIMITATIONS AND OPPORTUNITIES

While the study was never intended to be exhaustive, the evaluation ecosystem is quite vast, not only in terms of different understandings of equity but also in terms of rapid changes that have taken place in this ecosystem over the last two decades. Many of these issues reflect the fact that evaluation is quite political and dynamic and requires several in-depth conversations with diverse respondents. Our approach and methodological decision to create a diverse South-to-South partnership of researchers and organizations entering the evaluation ecosystem from different angles while incorporating active listening was innovative and interesting. This methodological choice provided opportunities not just for data collection and analysis but also for debate and mutual learning. Had there been more time and funding to implement this approach it would have been possible to undertake a deeper analysis of emerging results, especially as we get closer to planning concrete actions to transform the evaluation ecosystem.

Furthermore, we experienced first-hand the challenges of being surrounded by and speaking in different languages. We tried to fund opportunities for interaction and joint analysis with the support of simultaneous interpreters. Nevertheless, English was the language most frequently used, even in email communication. Thus, this imbalance created problems regarding in-depth mutual understanding, the access of information, and group revision of the draft reports.

Another key limitation, which in a way was also an opportunity to bring people from diverse locations and contexts, was the fact that most of this discussion took place in online platforms. We met online despite power cuts, limitations due to our different time zones, and online work fatigue. Bringing different people across continents at the same time is quite challenging, and the process required an incredible amount of facilitation and

coordination that took away time from concrete research activities. Also, the fact that the research team itself was in different locations made even collective analysis and report writing challenging.

We noted that there is an emerging group of Global South Donors. They are becoming active players in Asia, Africa, and, to some extent, Latin America. This study did not encompass obtaining information about their views and practices on evaluation within its scope. The focus was to initially understand the Global North perspective and the North-South power dynamics. In this sense, the picture of the ecosystem is not complete.

REPORT STRUCTURE

The report has four sections:

1. Setting the context
2. Picturing the evaluation ecosystem
 - a. Understanding of equity
 - b. Who is excluded?
 - c. How exclusion happens
3. Journeys of Change
4. Recommendations

Section 1 provides a very brief power-analysis of the current global scenario, where findings indicate a long-standing dominance of high-income countries in decision-making processes and the setting of standards, which percolates into the evaluation ecosystem.

Section 2 shows the current snapshot of the evaluation ecosystem. To begin with, we delve into the different understandings of equity that the varied actors in the ecosystem have. We do this in two ways: (a) through an analysis of the online survey, and (b) through an analysis of the interviews and Focus Group Discussions. From these understandings of equity, we can infer which groups and people that remain at the periphery of the evaluation ecosystem and the ways in which silencing happens.

Section 3 details various journeys of change disaggregated depending on their location in the Global North and Global South and agencies of different actors across power locations.

Finally, Section 4 provides the key inferences and recommendations to inspire reflections for a future strategy to influence a power shift in the evaluation ecosystem.

SETTING THE CONTEXT

Our premise for the study, as stated in the proposal and the Request for Proposal, is as follows. The evaluation ecosystem borrows heavily from the values and methods of *clinical scientific research*, thereby privileging notions like objective truth and replicability, and such methods as experimental designs and randomized control trials. These diminish the role of power and context. While evaluation identifies itself as technical, value-neutral, and objective, it is *steeped in norms, implicit bias, and judgments*. Furthermore, there is a clear domination of the Global North. The Global North –its nationals/personnel, methods, and its values and culture-- deeply influence the evaluation ecosystem. Nevertheless, the ecosystem is dynamic and there are efforts to address these inequalities in evaluations. This study aimed at getting deeper into these (and other) inequitable power dynamics within the evaluation ecosystem and initially map efforts -as journeys of change- with the potential to shape the evaluation ecosystem towards centering equity in its work.³

The Center, or Global North, comprises dominant high-income nations that also have a monopoly of power in institutions of global economic, political, and security governance. For example, high-income nations, with the US having veto power, hold a majority of votes in the World Bank and the IMF, which grants them control over crucial economic, trade, and governance policy decisions.⁴ The Organization for Economic Co-operation and Development (OECD)⁵ has 38 member countries, including many of the world's most advanced economies, such as the United States, Canada, Japan, and much of Europe. Invariably, these countries also define what is seen as the 'gold standard' in international cooperation and investments, "philanthropy" and official development assistance (ODA) and thereby in the research and evaluation of their funded initiatives. In terms of funding programs and evaluations, bilateral and multilateral agencies are still the dominant mode through which funds are managed.⁶ Backed by the wealthiest nations, these multilateral and bilateral agencies play a key role in defining how research and evaluations are carried out.

Global North countries have also seen an abundance of philanthropies. Some have been conducting evaluations for a long time, while others are more nascent, having been organizing programs without evaluation being part of the system of accountability or learning. However, many of these philanthropies are demanding more in-depth and comprehensive evaluations. China, India, South Africa, and Brazil are also emerging as countries which have started public and private development aid and assistance processes, as well as organizing evaluations.⁷ These philanthropies and new Global South bilateral agencies often seem to be following OECD-DAC evaluation principles, standards and guidelines, or the like, and do not pose any real challenge in terms of how research or evaluations are conducted or commissioned within their contexts.

While there are inequalities between the Global North and the Global South, in many recipient countries there are several campaigns and movements that are engaging with and seeking accountability on various issues from the local elites, including Governments. The international cooperation program becomes part of this local development ecosystem and therefore also part of the local power struggles. The evaluations are expected to

³ See the Proposal and Request for Proposal in the Annex

⁴ <https://www.imf.org/en/About/executive-board/members-quotas>

⁵ OECD is an international organization that works to promote policies that will improve the economic and social well-being of people around the world.

⁶ As the largest donors of 2021, in bilateral development projects, the United States of America has spent 21.219 billion US Dollars, followed by 18.340 billion US Dollars spent by Germany and 10.588 billion US Dollars spent by Japan. In multilateral official development assistance in 2021, the United States of America spent 9,298 billion US Dollars, followed by 8.496 billion US Dollars spent by Germany: <https://public.flourish.studio/story/1759356/>

⁷ <https://www.theguardian.com/global-development/2014/apr/19/homegrown-philanthropy-local-giving-global-south>

evaluate whether the programs have been successful in addressing deprivation, discrimination and inequalities within the recipient countries. In other words, the evaluation ecosystem is found in layers of inequities which overlap and intersect. In this sense, evaluation studies amplify the success of international aid, even if it is of merely 0.2% of Global GDP, and have the capacity to engage and, in fact, create, a dominant narrative on different models of development programs, which even if intrinsically not equity-centered, could have an adverse impact on the struggle for equity in development.

Overall, it is important to consider the enormous challenge of promoting equitable evaluation in a context in which the concentration of resources, decision-making power and opportunities are in a few hands; especially when this status quo is almost enhanced and promoted by the media, business decision-makers and even the academia and NGOs benefiting from disparities in the access to power. The deliberate work to open spaces for different voices, emancipation, empowerment and dignity in evaluation is only a tiny drop in the ocean. It should not be dismissed if we consider the number of studies commissioned every year to “learn” how international funding is promoting inclusive development and justice, and the role that marginalized communities, professionals and activists should play in them in order to help co-create another possible world.

PICTURING THE EVALUATION ECOSYSTEM: PERSISTENT INEQUITIES IN THE EVALUATION OF INTERNATIONAL COOPERATION INITIATIVES

As part of this research, we asked diverse Global North donors,⁸ multilateral agencies, Global North and Global South consultants, evaluation platforms, civil society organizations, social movements, and government representatives to describe their own experiences and perspectives on equity/ non-equity-oriented evaluation. In the discussions, interviewees gave diverse interpretations of ‘equity,’ thereby also providing insights into which actors are being excluded through persistent inequitable practices. Using concrete examples and describing patterns, they confirmed that:

- Certain groups are systematically excluded, discriminated against, silenced, or just “taken advantage of” during the evaluation of international cooperation initiatives.
- Exclusion happens through the use of specific policies and regulations and the re-edition of approaches, methodologies, practices, and behaviors maintaining an unfair status quo.
- There are some attempts to change this status quo but the limitations of these efforts are evident (see more in the “Journey of Change” section below.)

Considering this, in this section, we aggregated and summarized information regarding:

- Understanding of equity in the evaluation ecosystem
- **How exclusion happens:** the power holders’ decisions that are silencing the many, by action or omission
- **Who is excluded:** the groups and peoples that remain at the periphery of the evaluation ecosystem

UNDERSTANDING OF EQUITY IN THE EVALUATION ECOSYSTEM

To analyze more in-depth the concept of equity-oriented evaluation, we would first like to present the broad-ranging understanding of equity in evaluation as it emerged during this research process. While we recognize that this is an over-simplification, we decided to include it as a means to promote reflection: equity-oriented evaluation is not a concept embraced by everyone, everywhere. However, facilitating critical reflection on equity in evaluation –as is the case during this research process– might help the ecosystem to move forward in thinking of potential, equitable futures. The summary below aims to further this critical thinking.

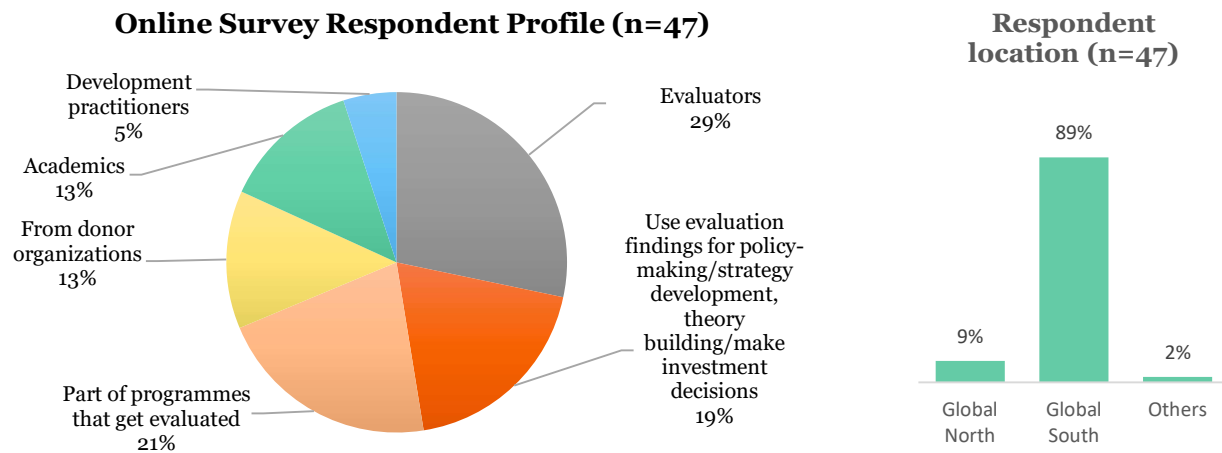
To start, we explore a few examples shared by the respondents of our online survey: they described what equitable evaluation meant for them. We then provide a categorization and analysis of the different understandings of

⁸ It is important to consider that at this stage of the action-research -and as stated in the “limitations” section above- we did not have the resources and capacity to engage with emerging Global South donors. During our joint reflections, however, we noted that there is a growing and stronger Global South group of philanthropic, international cooperation agencies and development banks. They are also shaping the evaluation ecosystem and are influenced and impacted by some of the dynamics described in this report. Another study would be necessary in order to delve deeper into Global South donors’ evaluation approaches and options.

equity, aggregating insights as shared during the interviews, focused group discussions, and South-South joint analysis sessions over the past few months.

UNDERSTANDING EQUITY CONSIDERING THE FINDINGS FROM THE ONLINE SURVEY

The online survey was responded by 47 people from 27 countries that play varied roles in the evaluation ecosystem (as seen in the chart below) with the highest percentage responding that they were evaluators themselves, followed by those who were part of programs that get evaluated and those who use evaluation findings for policymaking/strategy development.



As part of the online survey, respondents were asked to describe in their own words:

→ What does ‘equity-oriented evaluation’ mean for you?

A variety of responses regarding the understanding of equity, as shared by a few respondents, is quoted verbatim below, noting that there is alignment with other responses shared:⁹

“Evaluation that is carried out for the people, using the methods that are responsive to people and respecting their way of life, conducted by people who understand the context well and with total involvement of the people themselves.”

“Evaluation that not only addresses the six OECD-DAC (Development Assistance Committee) criteria but looks beyond on how behavioral changes happen, transformation takes place and how data gets collected, intersectionality is addressed, and equitable development is achieved.”

⁹ They are not all included here because of lack of space. All the responses can be accessed in the online survey report annexed.

“Evaluation that recognizes existing power imbalances and seeks to shift power and decision making toward local actors; that recognizes and elevates local knowledge and works at the service of mutual learning and accountability.”

“An evaluation that is co-designed and co-conducted with the communities, especially the marginalized groups.”

“Evaluation that empowers individuals, communities or organizations that benefit from a program, project, or policy (in relation to others and at the service of justice) as articulated by themselves depending on the intervention. e.g., healthier, safer, better business, more loans, etc.”

“Evaluations that take an intersectional approach, meaning that they try to ensure that participants from a wide range of backgrounds can participate. This requires evaluation teams who speak multiple languages, live in different regions of the world, and are committed to feminist evaluation principles.”

Considering this, we could conclude that equity in evaluations has been understood primarily from the lens of **decisive participation of communities, organizations, and individuals today at the margins of evaluation processes**. Power shift is key to equity. **Recognition of local knowledge, local stakeholders, and context** is stated as a significant part of equity-oriented evaluation.

Furthermore, during the research process, we aimed to gain a sense of the shifts and trends toward equity observed in the current ecosystem. Several questions in the survey requested input on this. We considered that the description of these shifts was going to be essential to assess in depth the current understanding of equity¹⁰. Specifically, respondents were asked to rate the trend of change on a scale of 1 to 5 on various equity-related parameters. The most prominent shifts happening according to the respondents are as follows:

1. **Gender diversity in evaluation teams:** The most prominent change was seen in a shift from male-dominant leadership to gender-diverse leadership evaluation teams. Fifty-three (53) percent of the respondents (out of 45 respondents) chose ‘4’ or ‘5’ on a scale from 1 to 5 for this shift.
2. **Non-white professionals in evaluation teams:** The second highest trend was a shift from the predominance of largely white teams to non-white teams. Twenty-nine (29) percent of the respondents (out of 45 respondents) chose ‘4’ on a scale from 1 to 5 for this shift, with 5 respondents selecting ‘5’. It is important to note that, as we will present below, a distribution of power towards non-white professionals and activists does not necessarily mean sharing power with Global South counterparts: in fact, it seems that non-white professionals born, raised, educated, and trained in the Global North, and who are, therefore, proficient in English, are those being proactively recruited in evaluation exercises. Hence, this shift does not mean that non-white, non-English speakers born, raised, educated, and trained in the Global South are included in order to expand opportunities and approaches in the design and implementation of evaluations. This is a distinction that should be taken into consideration when creating truly equitable endeavors to shift power in evaluation.

¹⁰ The complete survey can be found in Annex 1

The least dominant trends were related to shifts from those based in metropolitan cities to those from diverse regions/rural areas, from native English speakers to speakers of other languages, and towards the recognition of differently abled people.

Taking into consideration that building horizontal and dialogical partnerships between Global North and Global South actors could be considered a key feature of equity-oriented evaluation, in the online survey we also explore evaluation partnerships and how they are operationalized. The table below summarizes the results for shifts explored in this regard.

Table 1: Control and operationalization of evaluation partnerships

<i>Which of the scenarios are prominent, beginning to change and least prominent, in terms of Control of Evaluation Partnerships and how they are operationalized?</i>	Global North funding Global North evaluators (n=43)	Global North funding Global North evaluators but engaging Global South entities / consultants (n=45)	Global North funding Global South as implementers (n=45)	Global North funding Global South communities and local organizations to set evaluation agenda, processes and standards and implement the evaluation (n=45)
<i>Less prominent change</i>	47%	13%	20%	33%
<i>Beginning to change</i>	42%	47%	29%	47%
<i>Actively changing</i>	7%	36%	33%	18%
<i>Prominent change visible</i>	5%	4%	18%	2%

As we can see in the table above, the most prominent trend in the direction toward equity was reported as the Global North funding Global South as implementers. This trend provides evidence to support one of our conclusions: the Global South plays the role of mere implementers; data collectors rather than decision-makers or co-designers and co-leaders of evaluation processes (this is further explored in detail below). In contrast, in our online survey, the category presenting a more profound power shift from Global North funding Global South communities and local organizations for the latter to set the evaluation agenda and process had only had 2 percent of respondents indicating this as a prominent change, and just 18 percent reporting it as an active change. Forty-seven (47) percent noted that they had noticed the beginnings of a shift towards empowering Global South communities and local organizations. Overall, this confirms that Global South local organizations are still in the back seat when it comes to evaluating initiatives that are meant to impact their own communities. This should be a concern if the aim is to ensure that evaluations are a path toward democratization, mutual accountability, and culturally and politically relevant learning for change.

Finally, the least prominent changes were Global North funding Global North evaluators, implying that Global North evaluators were still the preferred choice when selecting evaluators. Another change that scored low on change was ‘Global North funding Global South communities and local organizations to set the evaluation agenda, processes and standards and implement the evaluation’ (33 percent indicated this as less prominent change), implying that while Global South evaluators may be selected, their participation and power in the partnership are still low.

In this context, there is a need to reflect if and how equity could be promoted in a context where Global South professionals are given only implementation roles, English is the main working language, or where key cities still concentrate resources and decision-making. **In our view, equity should be multilingual, multicultural, and multipolar.**

An analysis of the responses to the online survey, coupled with the perspectives shared during the interviews and focused group discussions, revealed that equity was also broadly being understood in additional, complementary ways. In the points below, we present these complementary understandings to help enhance our comprehension of equity-oriented evaluation.

EQUITY IN THE CONTEXT OF SHIFTING POWER TOWARD THE LOCAL AND THE GLOBAL SOUTH

Equity was also understood by way of a shift in power relationships between the Global North and the Global South: this understanding pivots from a geographical understanding to a geo-political understanding of power. Within this understanding of equity, there are several sub-categories that focus on different ways of understanding power dynamics.

- Geographical understanding of equity:
 - a. **Equity is seen as a shift in power towards the “local” –evaluation being closer to the primary stakeholders**, with more power in the hands of grantees and local evaluators. This does not necessarily mean the inclusion of directed impacted communities in evaluation processes.
 - b. Equity is seen as a shift in power toward “communities,” ensuring that evaluation as a process includes the communities’ voices. In this case, equity is understood from a community-participation lens.

The method of incorporating the views of these groups and taking concrete steps to shift power remain a challenge for many. It is important to effectively de-construct who constitutes the ‘local’ or the ‘community,’ without reinforcing existing unfair power dynamics within groups on the basis of caste, class, race, religion, age, gender, and/or language. We have provided more information on challenges, barriers, and options to “include the local” in the sections below.

- Geopolitical understanding of equity:

The key challenge in this shift of power towards the locals is whether this is leading to the decolonization of evaluation (more on decolonization in the “Journeys of Change” section.)

In short, we would summarize at least two emerging understandings of decolonization of the evaluation ecosystem:

- a. **Decolonization of evaluation is understood as Global South countries shaping the overall ecosystem**, its standards, criteria, and integral narrative. This means Global South actors challenging OECD-DAC standards and donors- imposed methodologies, with the opportunity to offer and showcase options.

- b. Decolonization of evaluation is understood as Global South organizations, evaluators, and consultancy firms taking on more roles in evaluations; this would be important not only for the development of contextually and culturally relevant evaluations but also for the integration of indigenous ways of creating knowledge and the multiple ways of understanding what constitutes development.

In this regard, we noted donors' stronger focus on “developing evaluation capacities” of governments in the Global South -the supposedly and so-called “poor, underdeveloped or developing countries”-, with this seen by a few as a path to empower the Global South. In these cases, for example, the “portfolio” grants are assessed at the Global North level while sub-grants are evaluated by the Global South governments and NGOs that were able to “develop” and “build capacities” following the Northern template. Considering this power dynamics, we noted some resistance by several Global South actors interviewed: what they see in these “efforts to promote inclusion and ownership” initiated by the Global North is yet another attempt to impose “capacities” often built on what the Global North considers ‘evaluation,’ including methods, approaches, and values. The request to Global South countries to emulate the North in some of the ongoing localization efforts would be, therefore, jeopardizing a more comprehensive process of Global South decolonization and liberation.

Similarly, respondents stated that in this attempt to empower the Global South, Global North-led agencies are selecting and engaging proactively with “like-minded” Global South organizations and academics. This means that there is a power shift in terms of geography but not in terms of values, ideologies, and approaches. A stronger elite of Global South evaluators is succeeding in emulating the North and taking the space without offering options to promote equity and social justice in evaluation.

In the “Journeys of Change” section below, we expand on these tensions and make observations on how diverse donors and organizations are opening the path toward equity.

EQUITY FROM THE LENS OF EXCLUSION AND DIVERSITY

Equity is also understood as a shift away from the dominant identity in the different spheres of evaluation within the evaluation process. This includes reviewing identities that are included or excluded in respondent categories as well as in decision-making spaces. In this sense, during the interviews and focus groups, participants reflected on some key questions that helped them to describe what is and what is not equity-oriented evaluation. For example, some research participants considered that, in order to assess the level of equity in evaluations, it is necessary to respond the following guiding questions:¹¹

- Who commissions evaluations?
- Who organizes evaluations?
- Who ‘mans’ evaluation teams, evaluation departments, and committees that develop evaluation strategies?
- Is there enough diversity in these groups, teams, and committees?

From this perspective, we may categorize stakeholders into the following three types:

¹¹ These questions are in line with the variables and sub-variables included in our “Equity Spectrum” used as the guiding framework to organize this South-led inquiry (see more under “Methodology”).

- I. **Leaving no one behind:** in some cases, equity in **evaluation is approached through a broader term, such as ‘Leave No One Behind’¹² (LNOB)**, to include all marginalized people in one category. Nobody should be left behind: this includes proactive power-aware and inclusive decisions in all evaluation decisions and practices.
- II. **Diversity in the evaluation team:** as appropriate to the objectives of the evaluation. For instance, for the evaluation of a program implemented in Africa or focusing on gender empowerment, a requirement should be that the evaluation team should include members that have expertise on Africa and gender, respectively. In other words, the commissioner of the evaluation wants to address a situation where the evaluation team is not entirely alien to the local contexts and themes. **Addressing diversity in this case is built into the selection criterion.**
- III. **Methodological and epistemological diversity:** several respondents identified the challenge of equity in the barrier that creates the universal application of a “clinical,” “military” or “corporate” approach to evaluations. They highlighted the idea of ‘rigor’ and ‘objectivity,’ as well as words such as ‘strategy,’ which were incorporated from sectors like the military and the medical sciences and have nothing to do with social change and human behavior. This type of language and approach have percolated into evaluation, which is then seen as passing ‘judgment’ on a program. As per this understanding, the current focus within the evaluation of linear, quantitative, objective, standardized, and economic-centric statistical approaches needs to change for evaluation to be more equitable. For them, the shift towards equity in evaluations is understood as a shift towards different kinds of bottom-up designed indicators and different ways of developing them and using approaches that can measure social and systemic change. In this sense, equity is much more than including diverse voices and social groups: it is about ensuring that people embracing multiple theoretical, political, and cultural frameworks have a voice and play a role in evaluating international cooperation programs.
- IV. **Representation of alternative ideological frameworks such as feminism, anti-black racism, decolonization, or anti-capitalism.** In most cases, the commissioner understands that the mainstream ideology of the development ecosystem is not aligned with alternative ideologies. Therefore, it brings on board evaluators who subscribe to ideologies that openly challenge the mainstream.

It is important to note that these categories of the understanding of equity are all interrelated and get interpreted differently by actors in the ecosystem at different levels. As efforts are being made to include certain identities and shift practices to balance power, the definitions of equity as shared by the interviewees and those part of focused group discussions have helped us conclude what inclusion means to them and therefore also who is currently not included in the evaluation ecosystem. This forced us to think about possible patterns through which certain sectors of society are consistently excluded and which decisions and practices perpetuate this exclusion.

In the following section of the report, we delve into these two key aspects of this landscape analysis:

- Who is excluded?
- How are they excluded?

¹² More on the Sustainable Development Goals (SDGs Agenda) principle of “Leave no one behind” here: <https://unsdg.un.org/2030-agenda/universal-values/leave-no-one-behind>. More details about this in the section “Journeys of Change” below.

WHO IS EXCLUDED?

Through the research, respondents reflected on who has/ has not had a proactive role, decision-making power, and a voice in evaluation processes. The inequities described were expressed in the form of diverse geographies - from local to geo-political- and multiple socio, economic, organizational, and cultural identities.

When mapping excludes geographical, social, cultural, linguistic, and other multiple characteristics as varying ways of “being” and “acting” in this world, it is easy to note that those silenced are the same groups who have been historically colonized, as well as those oppressed by unfair hierarchies now perpetuated by mainstream international cooperation practices. To sum up, those that are “left behind” and maintained at the periphery of knowledge creation and accountability processes associated with evaluation are the same groups that the initiatives proclaim to be empowering and including.

In each evaluation process, exclusion manifests itself in different and interrelated layers. For analytical simplification, we present below a few categories that include summary information as to who is generally and has been systematically ostracized, excluded, and silenced, recognizing that these categories often intersect. The categories are:

- (a) The Global South
- (b) Global South evaluators
- (c) The locals
- (d) Communities
- (e) Evaluators representing diverse ideologies, guided by “nonmainstream” action-oriented principles.
- (f) Implementing agencies: grantees and local partners

(A) EXCLUSION OF THE GLOBAL SOUTH



The Global South

Established in the 1960s as a “forum and knowledge hub for data and analysis, exchange of experiences, best-practice sharing, and advice on public policies and international standard-setting,”¹³ the OECD DAC countries and committees are also the largest funders of global research and evaluations. Growing from an establishment used to coordinate the efforts of ‘developed’ countries to provide aid to ‘developing’ countries, over the years, the DAC has

played a key role in shaping global development policy. For example, it developed the Official Development Assistance (ODA) concept, which is now considered the internationally agreed standard for measuring aid flows. The DAC also created the Development Assistance Committee Peer Review process, which assesses the quality and effectiveness of member countries' aid programs.

On the other hand, representing “*the receiving end*,” both in terms of international cooperation funding flows as well as the sites for development programs, we can mainly find Asia, Africa, Latin America and the Caribbean - most of them non-OECD-DAC countries.¹⁴ Perhaps the most remarkable example of the South exclusion, described by both the Global North and South interviewees, is the perceived “imposition” of the six OECD-DAC

¹³ <https://www.oecd.org/about/>

¹⁴ <https://www.oecd.org/dac/financing-sustainable-development/development-finance-standards/DAC-List-of-ODA-Recipients-for-reporting-2022-23-flows.pdf>

evaluation principles of “relevance, effectiveness, impact, coherence, efficiency and sustainability,”¹⁵ which are deemed as good practice in evaluation and often determine the approach and methodologies used in evaluation. These standards are systematically included in mainstream evaluation endeavors with non-to-limited consultation with Asian, African, or most Latin American countries, organizations, and grantees. For example, respondents openly shared their judgment that:

“OECD-DAC principles are still aligned with the old growth paradigm. They just focus on efficiencies and effectiveness as expressed in expected targets and outputs that should always show scalability and/or increases as value for money.” (Commissioning organization from The Netherlands)

In this sense, it is important to note that the drive for measurement has snowballed since the adoption of the OECD DAC Aid-Effectiveness Agenda in 1992 generating questionable practices to prove impact and value for money. *“For years, academics and practitioners and key actors of South-South Cooperation called for changes to these dynamics. Finally, the OCDE DAC published a review in 2019 integrating two principles that should underpin all impact evaluations: as such, evaluation criteria:*

1. [...] **should be contextualized** – understood in the context of the individual evaluation, the intervention being evaluated, and the stakeholders involved.
2. [...] **should not be applied mechanistically**. Instead, they should be covered according to the needs of the relevant stakeholders and the context of the evaluation.”¹⁶

If we explore, for example, the recently released new Spanish “Global Solidarity Policy”¹⁷ we can confirm how OECD-DAC standards and principles are integrated. This policy includes the purpose and guiding principles regarding the evaluation of funded programs:

“The evaluation will be conducted in accordance with the principles of independence, impartiality, credibility and usefulness and other current international principles and standards, such as relevance, effectiveness, efficiency, sustainability and impact with a participatory character and a comprehensive approach, to independently assess the impact of Spanish cooperation as a whole in terms of development results. It will help generate knowledge for its improvement in all areas as well as enhance transparency and accountability at the national, European, and international level, addressing all the stages that are part of the development cooperation policy cycle, from the design of results to its results and impacts.

The planning, execution, and use of the results of the evaluation will be conducted according to the principles and tools contained in the regulations that are applicable to the evaluation of public policies in the Public Administration.”¹⁸

¹⁵ <https://www.oecd.org/dac/evaluation/daccriteriaforevaluatingdevelopmentassistance.htm#impact-block>

¹⁶ See more details in Cecilia Milesi and Erika Lopez Franco’s paper: <https://globalchange.center/en/2020/10/29/volunteers-and-activists-promoting-inclusion-accountability-justice-and-inclusion/>

¹⁷ We use here the Spanish International Cooperation guiding policy for exemplification purposes only. At another stage of this research, it would be possible to assess all international cooperation policies of Global North donors in order to confirm how the direction and strategy aligns with Global North internal national priorities -especially relating to security - which are not necessarily aligned with Global South national priorities. There is overwhelming academic evidence that it is not possible to cite here but could be explored in the future.

¹⁸ The “Global Solidarity Policy” is the official Spanish document providing national guiding principles, priorities, and guidance on how Spain should engage in funding international cooperation programs through their national, regional, and local international cooperation agencies. See the complete policy and specifically Article 8 focusing on Evaluation: <https://www.boe.es/boe/dias/2023/02/21/pdfs/BOE-A-2023-4512.pdf>

As we can see from the extract above, the focus is on respecting the OECD-DAC established standards as well as the principles of impartiality and credibility. Hence, the process focuses more on the supposedly “neutral” extraction of information than on subjective opinions and experiences of the impacted citizens and communities.

Besides the imposition of standards and templates, Global South research participants provided examples of how evaluations typically respond to self-servicing internal interests including risk management, and upward/ internal accountability requirements. They confirmed that funding decisions are about the **implementation of foreign policy agendas and/or externally defined strategic plans that are not necessarily aligned with citizens’ and Global South actors’ demands, priorities, and rights.**

In the “Journeys of Change” section below, we will provide information of how Global South countries and diverse actors are trying to open spaces for more dialogue and coordination to promote alternative principles. Some of these principles are enshrined in the South-South Cooperation agenda, more attentive to the dynamics in a multipolar world. However, at this point, it is important to note that progress seems to be slow and very limited.

(B) EXCLUSION OF GLOBAL SOUTH EVALUATORS



Global South Evaluators

There is a staggering recognition that donors systematically prefer and hire evaluators, consultancy firms and academic institutions from the North. There are multiple reasons for this, including:

“They speak the “right” language (evaluation jargon and English)

“It takes less time to get to known evaluators as we need to deliver fast; most of them are close to us.”

“We don’t know where to recruit Global South evaluators or how best to reach out to get their applications. It’s an extra effort.”

Moreover, we heard accounts confirming that, because Global North (mainly Caucasian) evaluators are proficient in the dominant language (English) and trained in Western approaches and methodologies, they have higher chances of being selected in any international bidding process. Thus, open competition is not necessarily a path for the inclusion of evaluators from the South, especially those who speak other languages or for whom English is not a first language and present methodological proposals that are not aligned with the mainstream.

In this context, there is a recognition that financial resources stay in the North, while knowledge circles back to consolidate institutions from the North and mainstream spaces to debate monitoring, evaluation, and learning policies and practices. In this vicious circle, privileges are reinforced, local knowledge is not shared and disseminated while opportunities and access to professional development are retained by the so-called “usual suspects”.

As we will argue below, this means that evaluations are not grounded on a sound local understanding of contextual, historical, cultural, and conflict factors that need be factored in if the aim is to really learn about impact, how social change happens, and have a deep understanding of failure as an element that can inform program adaptation. Even worse, several respondents commented:

“Global South evaluators are included only for data-collection purposes. They are not part of evaluation leadership teams, and they are not usually invited to the analysis or dissemination of findings. Many times, their authorship is not even mentioned in publications.”

Our analysis of five samples of donors' evaluation reports confirmed this. Only a few studies reviewed are led by Global South evaluators or, at least, diverse teams of professionals and organizations representing multiple realities and identities. Most of the time, the evaluators and/or consultancy firms are from the Global North, while the research leadership is in hands of professionals from the North -even when they are based in the Global South. Hybrid options advocating for South-led or South-to-South leadership in evaluation processes are on the rise, but they are still an exception. As mentioned above, we observed that there is still an understanding that a "global" or "portfolio" evaluation is best conducted by a group of professionals residing in capitals in the North. This study aims to demonstrate that a global analysis can also stem from the peripheries of the system.

In this process, several Global South actors and evaluators admit to behaving submissively and obediently owing to high competition among agencies in the Global South. For example:

"As a recipient organization or CBO, we are not as well prepared, so the lack of preparation from our end also makes us think that what they [GN experts] are doing is good and helps sustain their models. So, whatever we get from GN experts, as they are from Harvard University and Stanford University and all these biggies, we agree." (Expert consultant, Bhutan)

Others described the difficult situations they have to face at the personal and professional level –including censorship and harassment– when trying to challenge imposed standards and methodologies. Many put themselves and indirectly, their families– at risk as professional fees and consultancy payments are halted if and when deliverables are not deemed "fit for purpose" according to the donors' criteria and Global North professionals "peer-reviewing" and "quality assurance" processes.

To add complexity, Global South evaluators took responsibility for not always creating or opening spaces for professionalization and the participation of young researchers and evaluators. They describe a conservative culture shaped by "the feudal elder evaluator." In this dynamic, new ideas, voices, and approaches to expand and enrich the evaluation ecosystem might be missing.

(C) EXCLUSION OF THE ‘LOCALS’



The 'Locals'

A contested category is what we define here as “the locals.” Within the complex ideas of the “Global South” there are multiple actors and processes that are closer to the issues and problems that international cooperation programs seek to overcome. From local citizens to grassroots organizations, indigenous groups, or even local municipalities or governments, a multitude of actors proximate to the day-to-day socio-political challenges seem to be utterly dismissed by evaluation policies and practices.

The reasons for silencing “the locals” are very complex and interlinked, but we can summarize the following key points that were uncovered through our research:

1. Evaluators selected by donors lack proficiency in the local languages.
2. External evaluators lack an understanding of local power dynamics.
3. The methodologies used are not participatory, inclusive, and culturally responsive.
4. The standardized tools (mainly surveys) applied fail to capture the complexity of social change processes.
5. The evaluation indicators and/or “learning” questions defined are not locally relevant and are centrally pre-determined.
6. The evaluation exercises are short-term and do not imply commitment to long-term support or investment in process-oriented learning for action processes.
7. The rigidity of evaluation approaches does not adapt to multiple realities.
8. Underfunding organizations that cannot invest in organizational development, including enhancing planning, evaluation, and learning capabilities.
9. The request for “locals” to simulate and replicate methodologies that are not grounded/ relevant in context.

In reminiscing of colonial and positivist ways of working, one respondent stated:

“At most, local citizens are used as “key informants” or “enablers for access.” External evaluators take advantage of them, extracting information that very rarely is fed back to communities in order to enhance whatever is deemed necessary by them. Most of the time, there is no financial or symbolic retribution for the time they dedicate to supporting external evaluators’ work.”

The ethics behind this professional and organizational behavior seems to be actively endorsed by mainstream donors, consultants, and academics: “harm” prevention is not clearly integrated in order to prevent local grievances.¹⁹ A recent publication’s outcry, wondering angrily “*why am I always being researched?*”²⁰ is being circulated in international cooperation spaces as a way to mobilize change.

As we will explore in the “Journeys of Change” section below, to some extent, the current momentum regarding the so-called “localization” and “participatory grantmaking” agendas seems to be responding to some of the challenges above, with only limited success thus far.

¹⁹ See CDA Collaborative Learning Guidance Note on Evaluation on Do Not Harm (DNH): <https://www.cdacollaborative.org/publication/guidance-note-on-evaluation-and-do-no-harm/>

²⁰ See publication here: <https://chicagobeyond.org/researchequity/>

(D) EXCLUSION OF COMMUNITIES



Communities

Within “the locals”, Global North and South actors recognize that typically diverse actors within local communities are systematically excluded in evaluation processes. Who is excluded and how varies depending on the context and the top-down methodological approach that might complicate the articulation by marginalized groups. Some of the excluded groups are:

- **Women and diverse gender groups.** The increased attention to gender mainstreaming is strongly focused on gender disaggregation but not necessarily on the active participation of diverse gender groups from design to analysis within the evaluation project cycle.
- **Indigenous groups.** In particular those that are the “hardest to reach” because of geographical, linguistic, or contextual challenges.
- **Rural populations.** The evaluation teams are led and composed of professionals trained in cities and methodologies that are not expansive enough.
- **Structurally marginalized groups depend on context.** The views and stories of, for example, people belonging to specific tribes, describing some religions and/or “belonging”/ “categorized” as part of certain castes, races, socio-economic groups, regional groups, etc.

There is a recognition that, over decades, and in particular Latin America²¹ and some Asian countries developed extensive expertise in participatory approaches to programming and evaluation; and that a few donors invested resources in producing guidelines for participatory evaluation²² or the embedding of participatory rural appraisals (PRA).²³ However, there seems there is a long way to go to ensure that participation is soundly embedded in evaluation and mainstream processes across national, regional, and global evaluation policies and practices (see more in the section “Journeys of Change” below). What is worse, during our joint analysis research sessions, we concluded that *academics and organizations from the North have packaged Global South knowledge and tools for participation. They now charge large amounts of money to do what we created, offering it to the evaluation industry at the locals’ expense.*²⁴

We observed increasing awareness of the need for “**intersectional**” and **power-aware context analysis**. In particular, a few donors we spoke to clearly expressed that without intersectional and power-aware context analysis there is no possibility of producing sound learning and evaluation processes oriented to transforming the root causes of inequality and injustice. However, if the intersectional and power-aware analysis is done by those “parachuting” to local spaces, their validity and transformational power are likely to be very restricted. In any case, we consider that this is a positive development in the direction of the inclusion of the “locals” and “the locals within the locals” and something to be further visibilized and promoted.

²¹ Please see [https://participatoryactionresearch.sites.carleton.edu/about-par/ to learn](https://participatoryactionresearch.sites.carleton.edu/about-par/to_learn) about the origins and approaches related to participatory action-research

²² https://usaidlearninglab.org/sites/default/files/2022-05/participatory_evaluation_for_ild_1.pdf

²³ <https://www.tandfonline.com/doi/pdf/10.1080/03768359508439858> and the World Bank Participation Source Book

²⁴ A growing trend of Global North academics and organizations packaging and monetizing Global South knowledge is a concerning trend. For instance, participatory rural appraisal (PRA) and several participatory methodologies and tools are a widely utilized method for community-based and community-led research originated in the Global South as a grassroots practice. In recent years, however, organizations and universities from the Global North have taken PRA, rebranded it as proprietary, published it in renowned journals, and sold it as a consulting service, often at a significant cost. This limits access to knowledge of the local practitioners who were instrumental in its development, while disproportionately benefiting institutions from the North.

As mentioned before, something to be considered when commissioning and developing evaluations is what Global South interviewees and partners shared regarding the behavior of “Global South elites”: they concentrate power and act in discriminatory, exclusionary, and racist ways.

Also, local elites may limit donors’ access to a vast network of grassroots organizations and leaders that are compelled to operate under the “guidance” of the so-called “Mother” or “Umbrella NGOs” operating in a similar fashion to North-led INGOs: this is, as intermediaries, channeling funds in a way that is functional to them. As Global North donors do not seem to be taking a step further in truly expanding their outreach at the local level and enhancing their strong cooperation with diverse local actors, the “field” is somehow “co-opted” by a few becoming a new group benefiting from privileges and rewards of an inequitable system. In a similar way, Global South consultancy firms not challenging inequitable evaluation practices are gaining recognition and slowly winning bids, not necessarily because of their commitment to “speak the truth to power” through evaluation.

“If you want to talk in Peru about the situation of the indigenous population to a Peruvian diplomat educated in England, wearing a tie, who has never been to the field, for him that reality is more distant than for me, and I know it because I work in that field, not because I am from an indigenous population. And you have to explain things to him about his indigenous reality that he doesn't know, but he is the person who makes the decisions in the country (...)”


“The few Global South evaluators that have been able to penetrate the ecosystem are largely those who have studied in the Global North, are able to adapt their language and way of reporting to cater to Global North donors and are part of large networks or organizations that can deal with the paperwork and reporting requirements.”

This becomes more complex in contexts of “closing civic space.” Social and cultural exclusions are locally reinforced by authoritarian or regressive regimes in several Global South countries. In this sense, we noted a kind of “complicity” between Global North donors and Global South actors. In the words of one donor:

“We are doing as much as possible to train Global South actors, but I cannot control or change the fact that in many of these countries, there are authoritarian governments with no interest whatsoever in consulting or engaging with their own citizens.”

In this problematic scenario, in our view, it is important to reflect on programming and evaluation decisions and practices as enablers of a power shift, of emancipation and liberation (or otherwise). Power could be used to promote the status quo or, even minimally, to try to turn the tide.

(E) EXCLUSION OF EVALUATORS REPRESENTING DIVERSE IDEOLOGIES AND GUIDED BY ACTION-ORIENTED PRINCIPLES



Evaluators representing diverse ideologies and guided by action-oriented principles.

If we consider mainstream donors’ preference for what was described as “rigorous” evaluation methodologies that may “objectively” assess the impact of a program, we could then conclude that evaluators identifying themselves as “feminist” or “transformative” –offering subjective and cultural interpretations of reality– are not going to be invited to bid and win tenders.

In this process, we identified a growing number of “feminist” and “transformative” evaluators that are establishing long-standing partnerships with feminist and more progressive and innovative philanthropic donors.

As groups of “like-minded” people start forming, there seem to be growing silos cutting across the evaluation ecosystem: divergent perspectives create “walls” of division. For example, it seems that civil servants working for decades within a development bank might seldom exchange views and knowledge with activist evaluators supporting women’s funds. For one agency official:

“We struggled to introduce the concept of intersectionality within our institutional documents promoting more inclusive evaluation. And we got a strong push-back from member states. This was very disappointing for our team.”

The chances to cross-fertilize knowledge and perspectives might be restricted to opportunities created by global evaluation platforms and “global” capacity-building programs funded by Global North donors. In this sense, during the focus group discussion bringing together the most important global evaluation platform we confirmed that:

“If evaluation is to become more equitable and promote global equality and justice, then it will be necessary to advocate and work with civil society organizations and social movements rather than with only consultants or consultancy firms. We might need to burn our own house down.”

Similarly, we heard that the mainstream donors’ tendency to favor the so-called “professionally certified” evaluators and consultancy firms means that social organizations with a strong capacity to document and systematize action-learning using creative, indigenous²⁵, and locally relevant ways of effecting social change often find it difficult to obtain donors. A related challenge was shared by donors who identified that the lack of time and the lack of knowledge about the options of such action-oriented actors is often one reason for them to stick to the “usual suspects”. We heard several statements such as the following:

“Donors are not open to leaving their comfort zone and do not make the effort to partner with social organizations and movements directly engaged in facilitating reflective action, empowering learning and evaluation aimed at sustaining transformative change.”

(F) EXCLUSION OF IMPLEMENTING AGENCIES: GRANTEES AND LOCAL PARTNERS



Grantees and local partners

Finally, we also accounted for how diverse grantees or implementing agencies from all Global South regions do not feel provided for with the funds, space, and recognition to undertake inclusive evaluation processes oriented to enhance impact.

They expressed how they need to navigate complicated conversations because of donors’ imposed methodologies, timeframes, questions, hypotheses (in the form of pre-defined Theories of Change), working language, etc. Even though there is a growing movement towards increasing the disbursement of general operating support to grantees as a means for them to make their own decisions on how to evaluate and learn from their own work, it seems that grantees operate in a very constrained way at financial and staffing

²⁵ <https://journalhosting.ucalgary.ca/index.php/cjpe/article/view/68914>

levels. Therefore, not enough attention is paid to or there is very little interest in using core funds for evaluation and learning. This is because other urgent organizational and contextual priorities must be addressed.

Moreover, grantees seem to have “naturalized” that evaluations are to donors a “tick box” exercise that might allow for further negotiation on funding. Evaluations are not seen as part of a coherent and integral process to enhance impact, management adaptation and social change.

On another level, grantees stated that they do not perceive donors as trusting them and that, by imposing certain reporting and evaluation conditions, they have to divert attention away from real people’s problems. One of the leading human rights community funds told us:

“Our monitoring, evaluation and learning processes are designed in such a way that everyone “wins.” Evaluations are not made to see if something holds true or not; on the contrary, they are processes to identify progress, define strategies and create opportunities for common listening and learning. In this process, it is vital to develop a relationship of mutual trust with donors. They can also listen and share their views. Donors are often included in the listening processes, to also promote the gradual construction of trust and do “bottom-up” training of donors.”

Private philanthropic donors are working hard to experiment with ways to be more flexible and innovate to promote the inclusion of “grantees’ views and needs.”

Having considered the diversity of actors systematically excluded in the evaluation of international cooperation programs, we believe it is relevant to present case studies of Global North countries’ admission of structural racism permeating international cooperation policies.

In recent years, there has been a growing recognition of “structural racism” and “racial injustice” within Global North donor countries. This acknowledgement has led to a wave of investigations into how racism is ingrained in their international cooperation policies and practices. Previously overlooked efforts to promote localization and empower local actors have now taken center stage, prompting open discussions and debates on aid and racism among various Global North organizations, private consultancies, and actors.

It is crucial to note that Global South countries have long advocated for a “reckoning” and a “power shift” in the international cooperation sector through movements against conditionalities and South-South Cooperation initiatives. While the international cooperation sector has been motivated to change by recent events, such as the COVID-19 pandemic and the Black Lives Matter movement, it is important to approach these transformations with humility, recognizing that civil society in formerly colonized countries has been on a decolonizing journey since their independence. In the International Civil Society Centre (ICS) blog summarizing the key messages from the “Global Perspectives 2022” sessions, Miriam Neihaus highlighted that “In the [panel on South-South cooperation](#), Cecilia Milesi reminded the audience that the decolonizing journey has been travelled by civil society in (formerly) colonized countries since independence and not since the Grand Bargain, realizing southern chapters fair well independently during Covid, or Black Lives Matter. While all of this rightfully motivated many northern organizations to change, humility is still called for.”²⁶

Several examples demonstrate that Global North countries are investigating and addressing racism in their international cooperation initiatives. In 2022, the UK House of Commons International Development Committee

²⁶ Access to the blog and panel’s video recordings: <https://icscentre.org/tag/powershift/>

released a report acknowledging that racism is deeply embedded in the structure of international aid and reflects the power relationships of colonialism. The report highlights the need to address the terminology used by aid actors and the perpetuation of stereotypes in fundraising campaigns.^{27 28} Following the report, UK-based aid and international actors have taken swift action to demonstrate their commitment to inclusive change, though the long-term impact of these efforts remains to be seen. Similarly, the Dutch Ministry of Foreign Affairs commissioned an independent research agency to conduct an exploratory study on racism within the ministry. The study revealed entrenched and systemic racism experienced and perpetuated by the Netherlands both domestically and internationally.²⁹ Dutch organizations, such as Mama Cash,³⁰ responded swiftly, calling for significant action to transform this status quo.

These examples serve as a glimpse into the ongoing internal reviews on colonialism and racism being conducted by various donors and international NGOs. We hope that this study will provide valuable insights to inform and contribute to these diverse processes.

HOW EXCLUSION HAPPENS

As we listened to accounts on who is excluded today within the evaluation ecosystem, interviews also clearly described **the concrete approaches, methods, and ways of working that sustain the status quo.**

In the section below, we focus on the structural elements of *how exclusion happens*. We do this by delving deeper into the sets of decisions at the:

1. Policy level
2. Organizational level
3. Methodological level
4. Dissemination level

These four pillars are important because we confirmed that inequitable practices in evaluation are reified on an ongoing basis because there are people forming teams, selection panels, boards, and/or drafting and subscribing to organizational policies and practices that are perpetuating the described exclusionary state-of-affairs. Similarly, at the national, regional, and global levels, there are policy-makers, civil servants, and advocates behind national and global legislation, regulations, and funding decisions that are generating the conditions for deepening unfair and unjust power dynamics within the evaluation ecosystem. We explain this in more detail below.

In order to support the change process towards equity-oriented evaluation, in this section we have also included key reflective questions that donors could ask themselves when looking at changing the way they commission an

²⁷Summary Report: <https://publications.parliament.uk/pa/cm5803/cmselect/cmintdev/150/summary.html> and the full report can be accessed here: <https://committees.parliament.uk/publications/22698/documents/166821/default/>

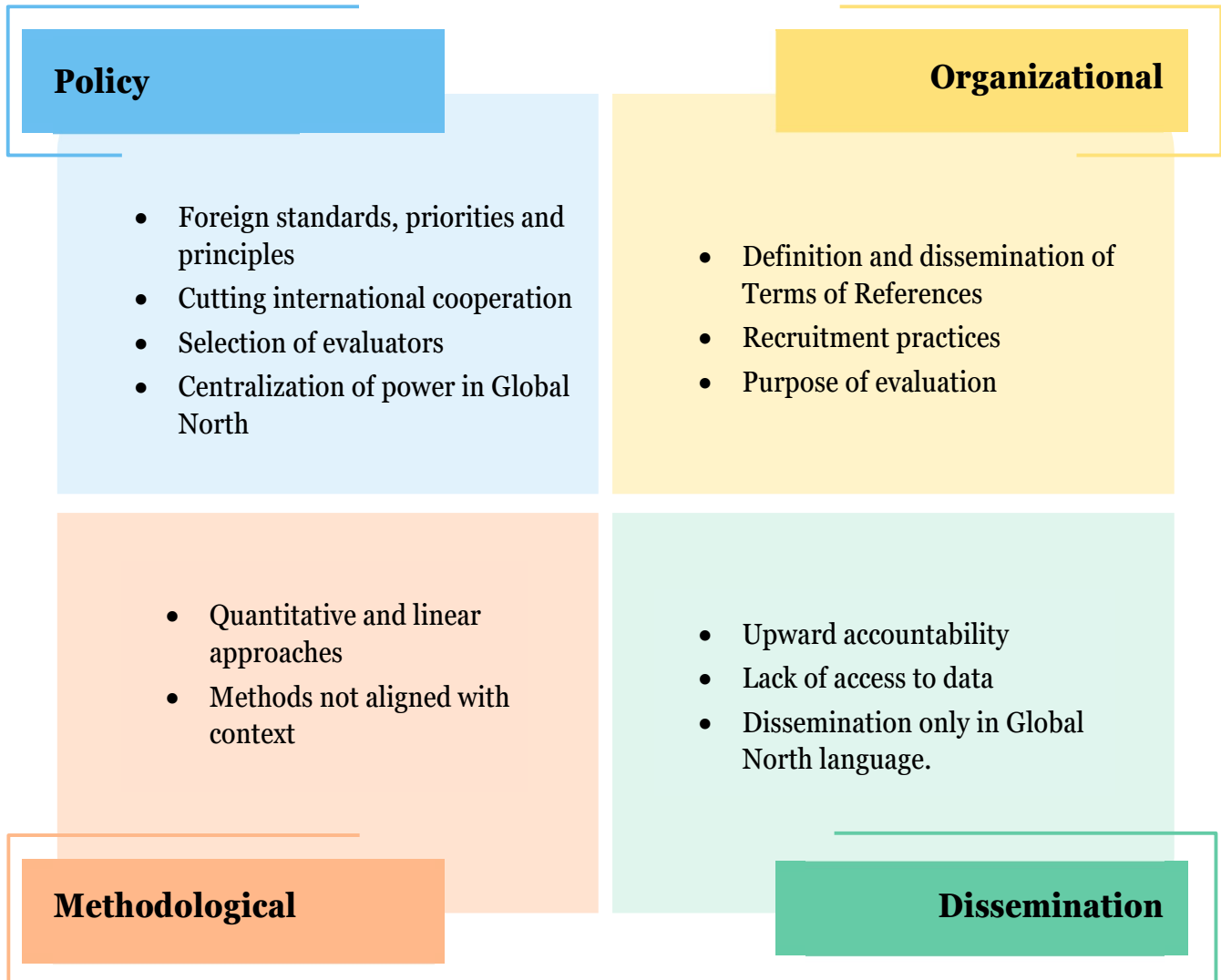
²⁸ An earlier UK inquiry on racism considered: "The definition of institutional racism, set out in 1999 The Stephen Lawrence Inquiry undertaken by Sir William McPherson: 'The collective failure of an organisation to provide an appropriate and professional service to people because of their colour, culture, or ethnic origin. It can be seen or detected in processes, attitudes and behaviour which amount to discrimination through unwitting prejudice, ignorance, thoughtlessness, and racist stereotyping that disadvantage minority ethnic people'."

²⁹ The full report can be downloaded here: <file:///Users/ceciliamilesi/Downloads/An+exploratory+study+-+Racism+at+the+ministry+of+foreign+affairs.pdf>

³⁰ Mama Cash statement reacting to the Dutch inquiry findings can be found here: <https://www.mamacash.org/en/mama-cash-statement-on-the-report-racism-at-the-ministry-of-foreign-affairs>

evaluation. These key questions are included in boxes below the description of how exclusion happens at each level. In the future, it would be wonderful to test the usefulness of using these questions with concrete donors that are open to shifting practices.

Figure 1: Structural exclusion in the evaluation system



POLICY DECISIONS



- i. **Foreign standards, priorities, and principles:** as mentioned above, the principles still reflect a Global North-centric view of development and evaluation, which “focuses on efficiency, efficacy and on accountability, without due recognition of contexts and local understanding of power relationships.” The interviewees talked about the challenge of applying the principles in diverse social and political scenarios.

To our concern, in policies and accounts harvested during this process, we noted that there is still an overwhelming “mechanical” imposition of international standards on Global South entities that seldom consider context and the voices of local evaluators and communities.

“In Bhutan, we have an alternative development philosophy (as a country) but DAC is treated as a gold standard in evaluation by external evaluators, and with our limited expertise in creating our own approaches, local evaluators accept the DAC.” (Evaluator from Bhutan)

The irony is that while OECD-DAC principles focus on participation and inclusion, there seems to be very little space for the participation of recipient countries in developing and finalizing these principles. As stated above, the club of Global North countries dominates at the apex, deciding directly the principles that should govern any evaluation.

- ii. **Cutting international cooperation funds:** Evaluation and even more so inclusive, participatory, and equity-oriented evaluation requires resources. As International cooperation funds are being cut³¹, there are even fewer resources to support evaluation efforts. The lack of cooperation funds also has a negative effect on ensuring training opportunities, long-term partnerships and collaborations between organizations in the Global North and Global South.
- iii. **Policies on recruitment and research:** While efforts are being made to involve diverse evaluators, a large number of interviewees from the Global North and Global South noted that most donors still end up choosing organizations or evaluation firms based in the Global North to carry out evaluations of programs in the Global South. For example, we heard that UN agencies and bilateral agencies still need to apply internal policies that favor the recruitment of Global North nationals. For example, the UK inquiry on racism in the international cooperation system more specifically found out that: “The way that FCDO contracts are structured creates disincentives for implementing partners to hire local staff, particularly in

³¹ A detailed analysis of ODA cutting by Global North rich countries is beyond the purview of this research. For information purposes, see these two articles highlighting which rich countries are cutting their international cooperation funds and why: <https://www.globalcitizen.org/en/content/rich-countries-cutting-international-aid-budget/> and <https://iirr.org/the-decline-of-european-state-support-for-foreign-aid-and-what-it-means-for-international-development/>

project lead roles. While FCDO fee rates for locally hired staff may be linked to local pay-scales in humanitarian and development settings, they can lead to large inequalities when compared to internationally hired staff. This can undermine relations with local actors, damage trust, and make frontline workers feel undervalued.”³² Also, the presence of parties that are external to a given context is perceived as ensuring “neutrality,” and this is enshrined in policies and administrative requirements. These types of policy principles do not encourage the recruitment of those external to the Global North. In this sense, organizational policies can act as enablers or barriers.

Some key questions donors could respond to promote equity-oriented policy decisions

- Are the evaluation principles and standards being used context- and region-specific?
- Are you funding South-led and South-to-South evaluation and learning endeavors?
- Are your grants including funds for evaluation and learning participatory exercises?
- Are you challenging the principles of neutrality, impartiality, and objectivity as a means to promote the inclusion of local voices? What alternative principles are included in your policies and strategies?
- Are you promoting equitable pay for Global North and Global South professionals involved in your evaluation initiatives?

³² Opt. Cit. above UK inquiry on racism

ORGANIZATIONAL DECISIONS



- i. **Definition and dissemination of ToR:** The Terms of Reference (ToR) for evaluations are largely developed only by the donor agency. They clearly lay out the steps for how the evaluation must be carried out, with little to no scope for change. Oftentimes, those requesting the evaluation and those paying for it are the decision makers of how the findings are disseminated, which in most cases are the donors, often leaving the communities that are at the center of the evaluation out of both the evaluation decisions as well as the dissemination of results. As expressed by one interviewee:

“When designing an evaluation, nobody questions who is interested in its results. You may find that the questions only address the concerns of the donors, but not the beneficiaries’ interests or their concerns.”

- ii. **Recruitment practices:** to assess this barrier, it is essential to investigate in depth who is part of the evaluation team and how the members are selected. As pointed out by one respondent from the Global North:

“The likelihood of you being selected depends on how visible you are in the network, and this is a disadvantage for Global South evaluators”

As shared at the beginning of this report, there is an agreed understanding that the Evaluation Ecosystem is functioning within an overarching control of the Global North donor institutions, especially multilateral agencies such as the World Bank and the IMF, and bilateral agencies such as USAID, UKAID, SIDA, the EU, among other bilateral donors associated with OECD-DAC. Furthermore, there are large philanthropies that are important grantmakers. Most of them are headquartered in the Global North. Hence, the commissioning of an evaluation and the final decision on who will evaluate are often determined by these Global North Institutions and within the limited space of those organizational cultures that replicate certain organizational values and beliefs held by the people who work in these institutions and/or centralized and highly hierarchical systems and processes used for procurement and recruitment. It was also pointed out by donors that a diverse set of procurement challenges, including funding foreign accounts, clearances for different banking systems, and paperwork often makes it difficult for them to recruit diverse evaluators. In some cases legal requirements (which could range from registration to licensing requirements) vary widely between countries; donors may require evaluators to comply with specific contractual requirements such as intellectual property rights or confidentiality agreements, which may be difficult for Global South evaluators to understand or comply with, especially if they are written in a language in which they are not fluent. There may also be complex and expensive insurance and liability requirements that may play a role in making it difficult for donors to select Global South evaluators/agencies.

A respondent from a donor organization highlighted that where someone has studied, or whether they have published a paper in a Global North peer-reviewed publication, or even basic things like the presentation of the CV are all factors that are often taken into consideration. Even within those from the Global South it is highly likely that the evaluators will be part of political and social elites, connected more to Global North evaluation than to local evaluation. Referring to the factors that lead to this situation, some respondents also mentioned the lack of time to search for and engage with context-specific evaluators.

Donors also lack knowledge about the local actors and who would be able to conduct the evaluation process. Due to funding deadlines and staffing challenges, donors also lack the time to search for such actors. It is even more difficult for them to invest the required time to build capacities, share information in multiple languages, and explore context sensitivities to ensure do-not-harm and conflict sensitivity in the evaluation processes. Fixed reporting guidelines, which require reports and weekly/monthly documents to be drafted in the dominant languages (more often than not, English) were additional challenges in hiring Global South local evaluators.

One participant of a focus group discussion summarized the challenges in this regard as follows:

“With evaluations being political and costly, there is no room to be open to risk-taking. So, evaluations that have been commissioned want experienced evaluators, those who have been practicing for decades in certain places. They are also concerned about being transparent and apolitical in evaluations, so they want evaluators not connected to the country where the evaluation is being held. There are political complications to evaluation.” (Global North donor)

- iii. **Purpose of the evaluation:** As the evaluation field in most Global South countries is largely donor-driven, donors invariably end up being the primary intended users and clients of the evaluation.³³ As a result of this, the evaluation design, questions, and approach all respond to the donors’ information needs. In this scenario, as shared by several respondents, there is often a greater push for ‘tracking’ the program, rather than ‘learning,’ thereby blurring the line between evaluation and monitoring. Thus, instead of using evaluation to build learning and plan ahead for all its stakeholders and the broader society, evaluation activities are narrowly employed to assess whether all the program activities are completed as planned.³⁴ This top-down prioritization of the results of a program steers the focus away from identifying points of change or lessons with intended impacts and benefits for the stakeholders involved.

“The focus of the evaluation is often pre-decided, with no feedback loop to get any insights or response from either those most affected by the program or the local actors. The nature of funding and allocation of money often forces evaluators to focus on deliverables rather than equity.” (Evaluator from India)

³³ <https://journals.sagepub.com/doi/10.1177/1098214010366175> Hay, K. (2010). Evaluation field building in South Asia: Reflections, anecdotes, and questions. *American Journal of Evaluation*, 31(2), 222–231.

³⁴ <https://pubs.lib.umn.edu/index.php/reconsidering/article/view/2077> Dighe, Sarode (2019). Evaluation in the Global South: Practices, Problems, and Prospects. *Reconsidering Development*

Some key questions donors could respond to promote equity in organizational decisions

- Are you devising the ToR with the Global South organizations that will be affected and/or involved in the evaluation?
- Are you actively recruiting using accessible, open, Global South communication channels?
- Are you including criteria to promote equity and diversity in the recruitment process?

METHODOLOGICAL DECISIONS



Seen as a process to ‘judge’ a program and to assess whether the program should continue to be funded and/or scaled up, evaluation has always been particularly dominated by an approach that is necessarily ‘objective’ with the aim of assessing the ‘efficiency’ and ‘effectiveness’ of a program. In all the interviews with donors, we heard several times the importance of “rigor.” Rigor is also presented as an important guiding principle in many donors’ organizational documents. However, “rigor” seems to be linked to the application of certain methods that are more “trusted,” in particular, quantitative and linear approaches. When asked if evaluations provided scope for challenging the Theory of Change of the program, 59 percent of respondents said ‘no’, while 84 percent said there was no scope to challenge the worldview of the program within the purview of the evaluation. As rigor is measured by donors commissioning evaluations, it seems that diverse and indigenous ways of producing knowledge or collecting information are dismissed as not rigorous enough.³⁵

“Engagement in participation is driven by Western ways of knowing; there is a slow uptake of using evaluation philosophies from Made in Africa thinking, or Asian and Latin American way of thinking to still get a good evaluation.” (Academic from South Africa)

What is being set as the gold standard is experimental methods like Random Control Trials (RCT), which are borrowed from the non-social understanding of development.

“It is easier to understand RCT as an approach because of the evidence-based matrix; it is glamorous to sell the impact of a project. But there is no explanation of the underlying elements of social intervention and innovation, which are different. You end up having literature on issue bias,

³⁵ Chambers, Robert (2017). Can We Know Better? Reflections for Development; Kaber, N. (2011) MDGs, Social Justice and the Challenge of Intersecting Inequalities

where you only evaluate things that are amenable to RCT. In my experience, Kenya, India, South Africa and Uganda have the highest number of evaluators using RCTs in the world.”
(Commissioner of evaluations from Kenya)

While more evaluators are recognizing the importance of context, perspective, and interpretation, randomized control trials and other such methods continue to be seen as the gold standard in many evaluations. Being a largely top-down approach, evaluations largely follow linear and extractive methodologies. Referring to the use of the Randomized Control Technique, one respondent pointed out that:

“The extreme focus on RCT has meant that evaluators only look for data that can be randomized which may not always represent what needs to be evaluated. The risk here is missing out on important things that stakeholders want to know. This is influencing the financing of development programs, as donors will fund evaluations that include the randomization of data.”

Many respondents shared that the focus on quantitative and ‘impartial’ data was still very strong, highlighting the bias towards data points and reducing nuance to numbers. The lack of time and access to local actors in some cases was also mentioned as a reason for evaluators choosing quicker, albeit extractive methods. It is worth noting that, since many of the Global South evaluators have studied/learned the techniques from the Global North, they too get used to linear and extractive ways of conducting evaluations in their own contexts. Some respondents shared that the uptake of evaluation methodologies that originate in Africa, Asia and Latin America and center local ways of knowing are yet to be incorporated at a larger scale in evaluations within their contexts.

Some key questions donors could respond to promote equity in methodological decisions

- Is this methodological approach incorporating more voices and enhancing innovation, participation, and local power?
- How culturally relevant are the methods proposed?

DISSEMINATION DECISIONS



- i. **Upward accountability:** As many of the most influential grantmakers obtain their funds from some Governments or Multilateral organizations, they are also accountable to those who provide the funds. In the case of evaluations, this can impact how the evaluations are carried out, what questions are asked and the dissemination of this information. As pointed out by many respondents, as long as the key decision-making powers remain in the hands of those with the funds, the use of evaluation findings will be limited and controlled. For instance, the Evidence-Based Policymaking Act (2019) in the United States of America requires agencies to “submit a systematic plan for identifying and addressing policy questions to the Office of Management and Budget (OMB) and Congress.”³⁶ Thus, information is collected for Global North representatives. Similarly, the UK inquiry on racism manifested that:

“We are concerned that the decision to designate the merged Foreign, Commonwealth and Development Office as a ‘reserved department’ shuts down the possibility of civil servants from the countries where UK aid funding is spent from taking part in funding decisions. This appears to go against other commitments to diversity in staffing and to shift decision-making power towards the countries where the aid budget is spent.”

Within private philanthropic organizations, evaluation data goes to global teams and boards who are the ones with the power to make programming decisions. Evaluation findings are not necessarily put in the hands of the organizations and activities driving the change processes.

- ii. **No open access to data:** While there are often several people involved in data collection and as respondents in the evaluation, the findings and the results of the evaluation are often held as the sole ownership of the commissioner. The lack of open access to data therefore also leads to the reinforcement of inequitable power dynamics.

“Donor X’ shall be the sole owner of all proprietary rights –all ideas, recordings, audio-visuals, materials, reports, products, documentation and manuals of any nature– originated, conceived of, or developed by the Grantee or any agent of the Grantee, for all services performed for the Donor X.” (Extract from a donor contract)

- iii. **Dissemination only in English/ Global North:** Most of the evaluation reports and findings are only published in the dominant language (English) and are often not translated into local languages, to then be shared with local stakeholders. The technical language of the evaluations is often not adapted for local

³⁶ [https://www.epa.gov/evaluate/evidence-act#:~:text=The%20Foundations%20for%20Evidence%2DBased,Budget%20\(OMB\)%20and%20Congress.](https://www.epa.gov/evaluate/evidence-act#:~:text=The%20Foundations%20for%20Evidence%2DBased,Budget%20(OMB)%20and%20Congress.)

stakeholders to engage with, so that these reports largely cater only to the commissioner of the evaluation.

- iv. **Information and images used for marketing purposes:** More recently, international Global North organizations are openly admitting how they have manipulated information and images of their work in the Global South in order to simply facilitate their dubious fundraising tactics in the North. For example, Doctors without Borders recently made progress on “decolonizing” the organization including the release of a video apologizing for how they had erased African voices from their videos, putting white people at the center of their narratives and images³⁷. Similarly, Oxfam have shown regret for its “white savior” tendencies. They just released a guide on “inclusive language” guiding all its communications. In the guide, they challenge the idea of “developing nations,” “beneficiaries” and other concepts typically used in communication practices of Global North organizations, putting down or invisibilizing the Global South and other diverse actors³⁸. Organizations such as “Fair Picture” are openly campaigning to avoid the “White Gaze” in international programs, denouncing historical colonization as a source of oppression. They said: “the constant repetition of the white gaze on poverty in the Global South perpetuates the perception of deprivation and stereotypes.”³⁹ Attention must be paid to how data, images, and stories are used for selfish communication purposes without any attention to the Global South rights and demands, or otherwise. Equity is about the right balance between access, openness, rights, and consent.

Some key questions donors could respond to promote equity in dissemination

- Are you using open-data approaches?
- Does the evaluation process fund activities for findings and recommendations to be communicated both at the donor, national, and community levels, promoting mutual accountability?
- Are your evaluation initiatives funding concrete exchange spaces to discuss evaluation findings including donors, partners, and communities?
- Have you considered the prevention of harm and discriminatory practices when managing your data or materials in your marketing campaigns?
- Are you providing the funds for working in the local languages, including the translation and local dissemination of all reports including the evaluation findings?

³⁷ This appears in one article summarizing in detail the Doctors without Borders history in addressing racism within the organization and, specifically, in its communication tactics: <https://www.npr.org/sections/goatsandsoda/2022/05/09/1091122969/msf-doctors-without-borders-racism> and the video <https://www.youtube.com/watch?v=8DFemg94ufU>

³⁸ See the guide here: <https://views-voices.oxfam.org.uk/2023/03/launch-inclusive-language-guide/>

³⁹ See the full article: <https://fairpicture.org/stories/why-development-needs-different-images>

In all the points mentioned above, we aimed to show and exemplify in as much detail as possible the main characteristics of today's inequitable evaluation ecosystem. By defining the diverse groups that are systematically excluded, invisibilized, and silenced we wanted to show that the challenge to balance unfair power dynamics is complex, multi-layered, and will require attention to multiple interrelated processes, and the interaction between the many factors that sustain an unjust status quo. Moreover, by initially presenting the concrete decisions and mechanisms through which control is maintained in a few hands, we wanted to invite the reader to consider in depth the diverse entry-points and levels that might be opened and mobilized in order to effect a positive change. We acknowledge that this is an initial presentation of the problem and that much more research is required to fully capture its complexity. In any case, we hope it is a starting point to support the process of developing a truly innovative and courageous change strategy. A holistic, multidimensional, and multi-stakeholder approach seems to be required. We envision joint, concerted, and decisive action engaging with all the entry points to the system. Only this might lead to a gradual transformation.

In order to further detail potential entry points, in the next section we present the initially harvested “Journeys of Change.”

JOURNEYS OF CHANGE: AN INITIAL ASSESSMENT OF THE STRUGGLE FOR TRANSFORMING UNFAIR POWER DYNAMICS WITHIN THE EVALUATION ECOSYSTEM

As we coordinated this research, we facilitated conversations including guiding questions regarding how Global North donors and diverse Global South actors are opening change processes to promote more equitable and locally-led evaluation approaches. More importantly, we specifically inquired about the concrete barriers and challenges that they face to promote a power shift. We complemented our preliminary analysis with the reading of various sources exploring the multiple “change agendas” evolving in the international cooperation space.

As we analyzed the data collected, we decided to call the emerging efforts to change the evaluation ecosystem “**journeys of change**”. With this denomination, we want to recognize that some actors engaged in the ecosystem are embarking on complex policy and organizational change processes: change is not easy or straightforward. In a critical moment in which there is a strong sense that decisive actions toward shifting power are no longer optional, we hope that the idea of “journeying” invites readers to envision and support long-term processes that will require sustained investment and commitment both from the Global South and North. Shifting the ecosystem's unfair and inequitable dynamics will be much more than just funding a few events or outcomes, small projects, or short-term initiatives; it will be required to develop bold, multi-layered, and inclusive collaboration in the years to come.

Additionally, it is important to remember that these efforts are happening in an uneven field, in which decision-making power remains in a few hands (as described in the sections above). Considering this, it should be noted that as we looked at the integral evaluation ecosystem, we observed that some Global North actors –in particular, North NGOs, INGOs and consultancy firms– might be trying to dominate the space and narrative regarding what is/ should be #shiftingpower. These Global North actors proactively engage in knowledge production and exchange regarding how the empowerment of historically marginalized South organizations, countries, professionals, and activists should happen. They have taken note that funding will be available for efforts towards “localization” and “decolonization.” Even as we celebrate the “reckoning” and engagement of Global North actors, and considering the evolving context, it will be essential to carefully check that initiatives to localize and empower the South are truly led by South-led voices and grounded in sound emancipatory practices. During this process, we noted that, logically, North and South actors have diverse views and perspectives on how change should happen. Considering this, in our view, action- research, facilitation, advice and the deployment of “expertise” should be primarily led and co-designed by and with diverse South and historically marginalized actors, avoiding the replication of power asymmetries described in this report.⁴⁰ As a note of

⁴⁰ For example, North consultancy firms and NGOs are organizing thematic webinars as an entry-point to sell advisory services, and North INGOs are awarded [USAID transition awards](#) to facilitate “local transitions.” Something to observe in these processes is that knowledge production and resources remain in the Global North. The terminology related to localization and “equity” is now included everywhere to align with donors’ funding priorities that are more attentive to the shifting power dynamics.

caution, we recommend that donors carefully observe this dynamic and, in the name of equity, duplicate efforts to directly partner with innovative and progressive South actors avoiding the sometimes unnecessary intermediation.

JOURNEYS OF CHANGE

For this report to help develop a long-term change strategy to shift power, we present the “journeys of change” categorized in ways that indicate potential “entry points” to influence the transformation of the ecosystem.

In this sense, we first want to present the journeys taking into consideration whether they are led by Global North or by Global South actors. As presented in the “Setting the Context” section, the asymmetric power dynamics within and between these two geo-political, socio-economic, and cultural spaces is relevant and should be factored in carefully if we aim to effect transformation towards equity and justice.

Considering this, we have classified the journeys into different categories recognizing that some of them are:

- i. Led by Global North actors, especially donors
- ii. **“Hybrid,”** i.e., co-led by Global North and Global South actors
- iii. Global South-led efforts

In our joint reflections as part of this action-research, we recognized that a huge part of the responsibility in maintaining inequitable evaluation practices (or otherwise) lies with Global North donors: they are setting the evaluation agenda and criteria while funding the evaluation. Therefore, they have the power to change this approach and shift towards evaluation practices that are truly equitable and inclusive.⁴¹

Taking this into account, in this section, we point out concrete examples led by a number of donors who are, arguably, transitioning towards equity.

Nevertheless, we consider that true equity-oriented change should be informed and shaped considering the voices and perspectives of the Global South progressive actors and discourses –with or without funding power. Equity efforts should be clearly grounded in the expertise of those who are in the “periphery” and those who are systematically excluded by mainstream evaluation policies and practices. The legitimacy required to do justice to the ideas of equity and democratization in evaluation will not be achieved in the board rooms alone, or by demanding that the South replicate Western evaluation models around the world. This would simply mean reproducing failed neocolonial endeavors with limited results in the promotion of peace, development, and democracy.⁴² With this in mind, we also summarized hybrid and South-led efforts that should be recognized, celebrated, and promoted in a holistic change strategy.

⁴¹ As mentioned in the “Purpose and Methodology” section above, this mapping is just a start. We hope that there will be continuous commitment to mapping efforts, while promoting connectivity and cross-fertilization of ideas.

⁴² On legitimacy, localization, participation and international cooperation see for example: Cecilia Milesi (*Citizens’ participation in peacebuilding: necessary reconfigurations for conflict resolution* (<https://bricspolicycenter.org/en/publications/innovation-and-citizens-participation-in-peacebuilding-processes-necessary-reconfigurations-for-conflict-resolution/>)) and Maia King, *Why local agency matters; enabling the space for local actors* (<https://osf.io/preprints/socarxiv/6uew8/>).

Second, as we conducted our joint analysis, we noted that, sometimes, a journey is directly linked to the efforts of a particular actor or group of actors organizing and promoting change along or within a network or platform. This means that we can precisely identify leadership. In these cases, we have included brief information as provided by the actors interviewed, also citing public documents relevant to each journey described. In other cases, a “journey of change” is a trend where we gather insights and observe the change processes that affect the ecosystem in general.

In short, we have also categorized the journeys considering whether they are:

- a. **Journeys with concrete leadership** (clearly developed by one actor or set of actors (for example, the United Nations Development Program (UNDP) or the Global Fund of Community Foundations).
- b. **Journeys spearheaded by diverse organizations working with a somewhat similar vision and narrative** (for example, participatory grantmaking or localization)
- c. **Journeys that are evolving as principled-based narratives and approaches** with strong philosophical and ideological foundations and where we were able to identify some case studies.

The categories are not hierarchical; none is inferior or better than the other. They should be assessed as complementing each other in a complex and evolving ecosystem change process.

Below we present the different journeys:

GLOBAL NORTH-LED JOURNEYS OF CHANGE

A. Journeys with concrete leadership

A1. Leave No One Behind (UN agencies)

B. Journeys spearheaded by diverse organizations

B1. Localization (USAID, SIDA, etc.)

B2. Capacity Building of South evaluators

B3. Participatory grantmaking

C. Principled-based journeys

C1. Donors promoting innovation, flexibility, mixed methods, and systems thinking.

HYBRID JOURNEYS OF CHANGE

D. Journeys with concrete leadership

D1. Evaluation Platforms

D2. #shiftthepower: networks of Community Foundations

D3. Networks of feminist and progressive donors.

E. Journeys spearheaded by diverse organizations

E1. South-to-North Capacity Building

E2. Made in Africa

F. Principled-based journeys

F1. Decolonization and Reparations (no-aid).

GLOBAL SOUTH-LED JOURNEYS

G. Journeys with concrete leadership

G1. South-South Cooperation.

H. Journeys spearheaded by diverse organizations

H1. South Resistance and alternatives to mainstream evaluation practices

I. Principled-based journeys

I1. Collectivization of Global South actors

This is not an exhaustive categorization of change efforts. For this report, we hope that we have provided initial information and the inspiration to continue the long-term action-research process of mapping those demanding, advocating, and already actively engaged in the promotion of equity-oriented evaluation.⁴³

The ecosystem is evolving and changing fast with new actors, initiatives, and change opportunities arising as we speak in all regions as well as cross-regionally. We strongly suggest employing a fast-paced, forward-thinking, long-term approach that equitably supports and invests the energy and commitment required to radically change the status-quo.

⁴³ The Ford Foundation team also received complementary Global South and Global North internal reports in preparation for the South Africa Joint Analysis workshop. We recommend revisiting those reports in order to obtain more information and details. Even though in this report we have attempted to summarize the most important findings, in those reports we also categorized “type of actors”, “type of actors’ accountability” and others. All of this could be useful for strategizing. We would be happy to provide more details and facilitate internal learning and organizational change in subsequent phases of this action-research process.

GLOBAL NORTH JOURNEYS OF CHANGE

A. Global North Journeys with concrete leadership

A1. Leave No One Behind (UN agencies)

“It is now recognized that national averages constitute poor evidence for policy decisions, as they conceal disparities affecting the individuals and groups who are furthest behind. The LNOB agenda seeks to redress this failure by making progress for these populations central to the realization of the Sustainable Development Goals. Leave No One Behind, and its twin promise to ‘Reach the Furthest Behind First’ (RFBF), means prioritizing human dignity and ensuring the progress of the most marginalized communities first. It urges nations to address the structural causes of inequality and ensure realization of rights and access to services in areas where quick results are least likely, and visibility is lowest. The ambitious undertaking of operationalizing the LNOB concept requires a collective effort to identify and share effective strategies.”

Oscar A. Garcia, Director, Independent Evaluation Office, UNDP⁴⁴

The Leave no One Behind (LNOB) agenda is spearheaded by the United Nations Development Program (UNDP) and, specifically, its Independent Evaluation Office (IEO)⁴⁵ in dialogue with the United Nations Member States and the UNDP Executive Board, made up of 36 UN Member countries.⁴⁶ It is inspired by and aligned with the Sustainable Development Goals (SDGs) guiding principle of committing to “leaving no one behind,”⁴⁷ endorsed in 2015 by all UN Member States. Because of the global spirit emanating from the SDG agenda and its cross-regional effects, it is an agenda to be watched.

The United Nations' approach to “leaving no one behind” entails reaching the poorest of the poor, but also seeks to combat discrimination and rising inequalities within and amongst countries, and their root causes. Furthermore, SDGs 5 and 10 are explicit about tackling inequalities. Despite these big aspirations, however, UNDP recognizes that LNOB is still not fully integrated in evaluations to be able to enhance the efforts for the transformation of persistent global inequalities. The UNDP formative evaluation report⁴⁸ highlights that: “LNOB is usually considered a separate result, rather than being integrated throughout reporting.” Moreover, “UNDP, like other organizations, is also struggling with indicators that could capture intersectionality.” Evaluation metrics of UNDP programs miss the “focus on the analytical categories of equality, equity, and non-discrimination, which are necessary in order to understand who is being left behind and why, and the extent to which UNDP programs and operations are achieving results that address these dimensions.” In this context, UNDP EIO aims to “update metrics and learning for leaving no one

⁴⁴ From “Formative Evaluation of the Integration by UNDP of the principles of Leaving No One Behind (2022)”: <http://web.undp.org/evaluation/evaluations/thematic/lnob.shtml>

⁴⁵ IEO website: <http://web.undp.org/evaluation/evaluation-office.shtml>

⁴⁶ UNDP Executive Board composition as of today: <https://www.undp.org/executive-board>

⁴⁷ Leave no One Behind principle, details: <https://unsdg.un.org/2030-agenda/universal-values/leave-no-one-behind>

⁴⁸ From “Formative Evaluation of the Integration by UNDP of the principles of Leaving No One Behind (2022)”: <http://web.undp.org/evaluation/evaluations/thematic/lnob.shtml>

behind and reaching the furthest behind first” recognizing that considering the perspectives of those furthest behind requires a systems-thinking approach and to consider intersectionality strategically.

This journey of change has gathered momentum as a result of the launch of the “Formative Evaluation of the Integration by UNDP of the Principle of LNOB” in December 2022. From this formative evaluation, we would like to offer a very useful summary of the **key “issues” and “actions” that should be taken into consideration if the aim is to ensure that “no one is left behind” in evaluation processes.**

Table 2: Intersectionality Enablers from “Intersectionality Resource Guide and Toolkit: an intersectional approach to leaving no-one behind” developed by UN Women⁴⁹ (page 28 of the formative evaluation).

Issue	Actions
Reflexivity	Recognise limitations and that your perspective is only one reality.
Dignity, choice and autonomy	Create safe and accessible spaces for all to participate equally including separate spaces where necessary.
Accessibility and universal design	Information and feedback mechanisms are provided in a range of accessible formats including local languages.
Diverse knowledges	Define and design programme objectives and activities collaboratively with people with experience of intersectional discrimination. Local staff are diverse, and the programme undertakes a proactive approach to inclusive recruitment.
Intersecting identities	Process, output and outcome indicators use qualitative and quantitative approaches to measure progress towards equality for the most marginalised.
Relational power	Activities challenge attitudes, stigma, stereotypes and discrimination faced by the most marginalised.
Time and Space	Flexible and regular monitoring systems that can analyse the influence of external factors.
Transformative/rights-based	Adopt specific measures to address equality and non-discrimination and promote the participation and empowerment of the most marginalised.

The “issues” and recommended actions in the chart above are relevant to the main dimensions to be considered when the idea is to enhance equitable practices in evaluation. For example, we find that the recommendations to understand and challenge unfair power dynamics (“relational power”)

⁴⁹ See UN Women Intersectionality Resource Guide and Toolkit: <https://www.unwomen.org/en/digital-library/publications/2022/01/intersectionality-resource-guide-and-toolkit>

are particularly important, considering “intersecting identities” but also the “time and space” required for flexible evaluation practices. Local evaluators might play a central role in comprehending these issues in depth and in relation to each specific context.

Barriers, Challenges, Recommendations, and Opportunities for Impact

It appears that “Leave no One Behind” is a very significant entry point to promote equity in the evaluation ecosystem. However, the report concludes that the integration of LNOB is still “limited.” The report points out several lessons that are relevant for those committed to promoting equity evaluation. One lesson that we would like to highlight here relates to the need for a change in mindset when equity takes center stage. As described in the report, this change requires staff diversity and staff training. In other words, it extends to diversity even among those who both commission and organize evaluations. Furthermore, UNDP also noted that LNOB will require deep-immersive training directed to civil servants, consultants, and partners in “intersectionality” – a key concept aligned with the promotion of equity. Achieving equity involves a long-term process for key actors to internalize and comprehend the idea that transforming the root causes of social problems requires much more than a “one-size-fits-all” approach and much more than just disaggregating data by gender group. As stated by one of the interviewees representing an evaluation platform:

“Commitment to equity requires much more than just disaggregating data by gender or being “gender sensitive.” It requires exploring the intersection of multiple factors that lead to discrimination against and silencing concrete diverse voices, including the imposition of a Western paradigm to explain impact and social change.”

At the same time, it seems that for an LNOB inclusive framework to have an impact on the ecosystem, it will be necessary for UNDP to expand even more its partnerships with private philanthropic donors, other bilateral and multilateral agencies, governments, development banks, think tanks and civil society organizations aiming to promote equity. This seems to be an ongoing effort, as reflected in the UNDP organization of “National Evaluation Capacities (NEC) Information Centre⁵⁰ and related conferences and learning opportunities for over a decade. Notably, during the last conference, participants endorsed the so-called “Turin Agenda,”⁵¹ which includes a good number of commitments to promote equitable and locally relevant evaluation practices. UNDP is also showing openness to invite to South-led think tanks to peer-review its evaluations (in the case of the recently released formative LNOB evaluation, Southern Voice⁵² was specially invited to peer-review it and provide feedback).

In general terms, efforts to cross-fertilize, expand and diversify co-learning should be increased. This means that UNDP and other donors should work hand-in-hand with a wider variety of deeply grounded South organizations and networks that have been promoting inclusive, critical, and

⁵⁰ National Information Centre (NEC) and National Information Conferences website: <https://nec.undp.org/about-nec>

⁵¹ Turin Agenda and event details: <https://nec.undp.org/publications/turin-agenda-2022-national-evaluation-capacities-conference>

⁵² Southern Voice website: <http://southernvoice.org/>

participatory approaches to evaluation in Latin America, Africa, and Asia for decades. This would require a massive shift in UN organizational culture and procedures that currently jeopardize innovative and diverse collaborations. In this sense, philanthropic donors might be better positioned to facilitate cross-fertilization of ideas, dialogue, and mutual support to expand the use of LNOB framework principles and approaches. More creative, cross-thematic, and cross-regional partnerships could be nurtured.

To a large extent, UNDP believes that if equity must inform the evaluation ecosystem, one important aspect is to ensure that national statistics of different Governments have data on LNOB communities. UNDP's efforts, therefore, focus on building the capacity of national statistics offices, developing and mainstreaming the multidimensional poverty and human development indices.

Finally, we would like to note that some actors have put the LNOB principle under the microscope: they consider that LNOB somehow dilute “universal” human rights commitments. Some countries and organizations may prefer to speak the LNOB language and commit to it rather than to human rights principles. It is important to address the perceived fear that a single LNOB umbrella may camouflage multiple contexts that lead to exclusion and rights abuses. Different social identities get excluded because of different politics. In other words, LNOB may become a generic term to understand exclusion, but this may not really resonate with rights-based, decolonial, feminist, Anti-Black Racism, or Anti-caste ideology. Nevertheless, this journey opens a space for engagement when focusing on equity in the evaluation ecosystem.

B. Global North Journeys Spearheaded by Diverse Organizations

B1. Localization of “Aid”

The clamor for localization is not new.⁵³ However, it has gathered momentum since the last World Humanitarian Summit (2016) and the establishment of the “Grand Bargain” as an agreement between major donors to “localize” the humanitarian agenda.⁵⁴ In the peacebuilding space, there is some noticeable political will to support locally-led development. This is seen in new policies and guidelines such as the “UN’s Community Engagement Guidelines on Peacebuilding and Sustainable Peace,”⁵⁵ and the UN Peacebuilding Support Office's May 2022 Thematic Review on Local Peacebuilding, identifying financing challenges for local organizations and recommending flexible funding. More recently, in 2022, USAID –as one of the main Northern bilateral donors– declared that “*by 2030, fifty percent of its programming will place local communities in the lead to co-design a project, set priorities, drive implementation, and/or **evaluate** the impact of its*

⁵³ For a short account of lessons learned in regard to past failures of the localization agenda see:

<https://reliefweb.int/report/world/five-reasons-why-localisation-agenda-has-failed-past-and-four-reasons-why-things-may>

⁵⁴ The Grand Bargain website: <https://interagencystandingcommittee.org/content/grand-bargain-hosted-iasc>

⁵⁵ See Peacebuilding and Sustaining Peace. Guidelines: <https://www.un.org/peacebuilding/content/un-community-engagement-guidelines-peacebuilding-and-sustaining-peace-0>

programs.”⁵⁶ ⁵⁷ Enhancing locally-led evaluation is part of the localization efforts. Notably, USAID does not put the word “equity” at the center of its narrative. Nonetheless, it seems that localization is perceived as something that can shift power, decision-making, and funding toward local actors, who can design and evaluate their own solutions for development. Other bilateral donors have followed suit: for example, the Swedish International Development Cooperation Agency (SIDA) has recently commissioned a study to assess their successes and failures in the implementation of the Grand Bargain localization agenda.⁵⁸ The implementation of the localization agenda shows evidence of the commitment but also the limited success of the Foreign, Commonwealth & Development Office (FCDO).⁵⁹ Overall, all bilateral and multilateral institutions supporting the Grand Bargain are facing an urgent call to account for their efforts and impact in promoting local power.

In our exchanges, we also noted a concern with respect to fully unpacking the meaning of “local”, while ensuring that the power dynamics are addressed as part of these efforts. As one research participant clearly stated:

“It is necessary to share funds and decision-making power, but it is also essential to unpack toxic patriarchy within “the local.”

To this end, we go back to our collective experience in using power-aware and participatory approaches in research and evaluation: only working with and close to the communities is it possible to localize funding in a way that empowers the most marginalized voices and groups, putting them at the center of any program design, implementation, evaluation, or adaptation process (see more on Participatory Action Research below.)

We recognize that donors are making some efforts to promote participation as a path towards equity. For example, USAID recently circulated a draft guide for its implementing partners on collecting feedback from beneficiaries of development programs, where it listed various tools and approaches for involving communities in evaluation. Some bilateral donors are committing to “feminist” principles in foreign policy,⁶⁰ at least in their written policies. It remains to be seen how feminist principles are consistently applied in the evaluation of international cooperation programs.⁶¹ Participation, power-aware interventions, or feminist initiatives can only be facilitated by some local organizations and consultants, not by all of them. In this sense, earlier attempts towards localization have been criticized for only using national or regional ‘Mother NGOs’ or ‘Umbrella NGOs’ that do not allow the inclusion of the voice of grassroots organizations and social movements either in implementation or evaluation processes.

⁵⁶ USAID Localization website: <https://www.usaid.gov/localization>

⁵⁷ The USAID reform is, however, not new. The former leader (Raj Shah) started the process by sharing some remarks such as the following: “This agency is no longer satisfied with writing big checks to big contractors and calling it development.” For a detailed background history see: <https://www.devex.com/news/rajiv-shah-s-usaid-legacy-85239>

⁵⁸ See Study RFT: https://eba.se/wp-content/uploads/2022/10/Grand_Bargain_invitation_to_tender-1.pdf

⁵⁹ See the study *Localization in the context of the UK engagement with the Humanitarian Reform Agenda*.

<https://www.frontiersin.org/articles/10.3389/fpos.2021.687063/full>

⁶⁰ See for example:- <https://www.government.nl/latest/news/2022/11/18/feminist-foreign-policy-netherlands>

⁶¹ See for example: https://issuu.com/awid/docs/strenghteningm_e?e=2350791/5242115

What is important is that this journey has just gathered momentum and opens a window of opportunities to influence evaluations from the lens of equity.

Barriers, Challenges, Recommendations, and Opportunities for Impact

Unfortunately, recent studies have shown that agencies are not delivering on the promise of putting financial resources in the hands of local actors. For example, at the moment, only 6 percent of the USAID budget goes to local organizations,^{62 63} while in the fiscal year 2021, US funding for local partners fell by more than \$200 million.⁶⁴ This means fewer resources for implementation as well as for evaluation. Also, one of the key conclusions of the research paper “*Time to reset: The World Humanitarian Summit and the Grand Bargain (GB) 5 years on*” clearly states that:

“With regard to many of the initiatives it sparked, the GB has so far remained predominantly output-oriented and has rarely achieved comprehensive outcomes. The GB’s aims defined in this paper as process-relevant (more transparency, more flexible financing, a reduction of bureaucracy) oftentimes materialized in interesting pilot projects, but rarely in a change of the processes themselves.”

Also, according to this study, the localization of aid and a so-called “participation revolution” of actors from the Global South, as well as cross-cutting issues such as an integrated Humanitarian-Development-Peace Nexus approach, gender equality, or humanitarian innovation, were not furthered in any decisive way. In short, as mentioned in the sections above, cutting off international funding, coupled with the donors' inability to move away from short-term, output-focused, and upward accountability ways of working means that the “Global South participation revolution” is simply not happening. This, of course, has a direct impact on the envisioned “participation revolution” in the evaluation space: with no/limited funding and donors' lack of openness to partnering with diverse grounded organizations, evaluation efforts will continue to be an elitist activity. Locally-led investments and evaluation only lead to limited results.

Despite this disappointing reality, the vision set up by the localization agenda should and could be used to make donors accountable by promoting both Global South and Global North-led advocacy. South actors could be empowered to mobilize and scrutinize real donors' actions toward promoting local power. Meanwhile, Global North- actors could use opportunities during the national elections to advocate for a different kind of “aid.” Both advocacy strategies will require, of course, investment in nurturing and facilitating existing and new spaces and platforms that tirelessly work to return power to “the locals” (see more below on the hybrid efforts of networks promoting donors' accountability.)

B2. Capacity Building of Southern Evaluators

⁶² See: <https://www.devex.com/news/us-congress-grills-usaid-chief-on-localization-ukraine-food-crisis-103200>

⁶³ Another important study with data demonstrating that USAID money is not going to local actors: <https://www.cgdev.org/blog/usaid-localization-numbers>

⁶⁴ See: <https://www.devex.com/news/how-usaid-assistance-funding-for-local-partners-fell-in-2021-103111>

One of the important cross-cutting components of several Global North journeys is the capacity building of various Global South stakeholders – governments, implementing partners and evaluators– on how to conduct better evaluations.

For example, for more than a decade, associations like the American Evaluation Association and the European Evaluation Society have hosted a range of professional development workshops and training programs related to evaluation practice, theory, and methods to help evaluators across the globe to build their skills and knowledge. Similar global initiatives also include the International Organization for Cooperation in Evaluation (IOCE) and EvalPartners. IOCE represents several Voluntary Organizations for Professional Evaluations (VOPEs) across the globe to promote “the exchange of evaluation methods, theories, and practice, and promotes good governance and recognition of the value evaluation has in improving people’s lives.”⁶⁵ Meanwhile, EvalPartners⁶⁶ is a global partnership that promotes evaluation capacity development (ECD) through a range of initiatives, including training programs for evaluators. Additionally, the EvalYouth Global Mentoring Program, provides training and mentoring to young and emerging evaluators around the world.

The World Bank has been building country capacity for Monitoring and Evaluation⁶⁷ through initiatives such as the Global Evaluation Initiative (GEI),⁶⁸ the International Program for Development Evaluation Training (IPDET)⁶⁹ and CLEAR.⁷⁰ These groups formed by the World Bank are also part of several networks such as the Evaluation Cooperation Group and EvalNet. In other words, there is a lot of investment on building capacity of governments, CSOs and evaluators, including for example the IEG Methods Papers series⁷¹. With localization and LNOB receiving fresh impetus in 2022 from USAID and UNDP, respectively, there are planned capacity-building initiatives on evaluations from these entities as well.

The Global Evaluation Initiative (GEI)⁷² is an international collaboration entity that seeks to enhance the use of evaluation in accomplishing the Sustainable Development Goals of the United Nations (SDGs). The International Organization for Cooperation in Evaluation (IOCE), the United Nations Evaluation Group (UNEG), and EvalPartners started the partnership in 2015. Within the framework of the SDGs, the main objective of the GEI is to support the use of evaluation as a crucial instrument for learning, accountability, and decision-making. It also promotes the development and use of evaluation standards and guidance, to ensure that evaluations are of the highest quality and contribute to learning and decision-making. With an emphasis on increasing evaluation capacity in low- and middle-income nations, the GEI offers training opportunities for evaluators and other stakeholders.

65 <https://ioce.net/>

66 www.evalpartners.org

67 <https://ieg.worldbankgroup.org/topic/evaluation-capacity-development>

68 <https://www.globalevaluationinitiative.org/>

69 <https://ipdet.org/>

70 <https://www.theclearinitiative.org/>

71 <https://ieg.worldbankgroup.org/methods-resources>

72 <https://www.globalevaluationinitiative.org/>

A number of these global networks that dominate the space of capacity building, by virtue of their composition, which includes bilateral and multilateral organizations and evaluation capacity service providers, undoubtedly constitute a crucial platform to influence the evaluation ecosystem.

Barriers, Challenges, and Opportunities for Impact

If one looks at them, capacity-building programs are built in such a way that they influence the entire ecosystem (module development, promotion through evaluation networks, integration with evaluation conferences, for example), in the form of pre-conference workshops, publishing papers and developing fellowship programs for young evaluators. However, many of these initiatives are still anchoring the lessons to be learned to mainstream and traditional Western approaches to evaluation, sharing knowledge about specific principles, approaches, and methodologies that are not necessarily aligned with the equity side of the spectrum. Even more so, equity is sometimes only seen as the need to disaggregate data based on gender or discussed in “extra/advanced” courses rather than integrated as a core pillar of evaluation practice (unlike other principles such as impartiality or rigor.)

Therefore, the fear of Global South partners was that this capacity development program could mainstream equity-agnostic evaluation systems and methods. After all, there is a concern that this “capacity building” might be more oriented to enhancing the hegemony of the Global North in the evaluation ecosystem –against the principles of localization, context- and culturally-responsive evaluation, and other emancipatory approaches, such as Participatory Action-Research networks, feminist evaluation or South-South, Made in Africa /Indigenous perspectives on knowledge creation (see more below when discussing Hybrid and Global South Journeys of Change.)

B3. Participatory Grantmaking

Within this category, we would like to present the emergence of the **Participatory Grantmaking Community**.⁷³ This community has taken the form of online groups which organize a series of webinars and conversations taking place at www.participatorygrantmaking.org

The community defines itself as “a global collective of individuals and organizations interested in sharing knowledge and practice to improve participatory grantmaking, encourage its use, and shift power within philanthropy.” On their website, they report that they have expanded to more than 1,000 members, with a governance structure composed of self-governed circles.

Naturally, as a new network, there is still room to develop concrete and standardized public principles and modalities of participatory grantmaking. More importantly, we have not found evidence of explicit exploration of participatory evaluations as an important component of participatory grantmaking. If the connection is made more explicit in the future, then this group could be an important entry point for pushing equity in the evaluation ecosystem.

⁷³<https://www.participatorygrantmaking.org/>

Barriers, Challenges, and Opportunities for Impact

This research did not encompass a complete mapping and assessment of this space and its views with regards to a specific evaluation. However, we would like to note that this is an important grouping that might be worth exploring further.

C. Global North Principle-based journeys

C1. Diverse Donors Promoting Innovation, Flexibility, Mixed Methods, and Systems Thinking for Partners' Increased Agency

Under this category, we would like to recognize the increasingly visible efforts of some Global North donors that are experimenting, testing, and openly promoting different ways of conducting both planning and evaluation.

More precisely, some North-based philanthropic donors are open to innovating and learning on how to avoid the pitfalls faced because of the over-rigidity observed specifically in evaluation frameworks used mainly by Global North bilateral and multilateral donors, and development banks.

These donors are not necessarily working under a common banner or umbrella unifying their voices and promoting bold action for change. However, they seem to be more and more open to sharing in the public domain their views on the need to transform mainstream funding and evaluation practices that are at odds with the values of equity, justice, and inclusion that they promote in their programs. Within the scope of this research, we were able to talk to a few of them.

Considering examples, experiences, and insights shared by them, we summarize below how these donors are **striving to move towards a planning and evaluation practice that is more:**

- Flexible
- Adapted to the local emerging demands on the ground as identified by local actors (grantees and partners)
- Open to experimenting, innovating and using mixed methods and approaches without attachment to concepts of neutrality or supposed “rigor”
- Striving to endorse system-thinking, evolving, and co-creating learning journeys with grantees and local/ global evaluators acting as facilitators

For example, we heard that several donors are no longer attached to the use of logframes, since they are considered an extremely rigid tool for planning and evaluation. An interviewee said:

“Logframes only include quantifiable indicators and are produced without consulting the implementing partners.”

At the same time, some donors are experimenting with establishing a **funding relationship** where partners are often guided through funding and evaluation designs that are constantly subject to adaptation. Donors invest time and resources to ensure that they hold open and ongoing conversations to develop trust as a key to learning if and how change is happening. In this process, theories of change (ToC) –despite being linear constructions– are revised in conversations held regularly that do not follow unchangeable, pre-established “expected milestones” or “targets” tracked in top-down, mid-term and end reviews that are imposed.

Furthermore, these donors offer resources for grantees to **invest in the facilitation of online and offline learning events that are useful to gradually assess emerging impacts** and lessons resulting from the initiative, always respecting grantees' timeframes and the complex processes involved, to bring diverse actors on board for the evaluation and learning processes.⁷⁴

We also recorded accounts of donors interested in enhancing flexibility for impact. They are doing this by providing **core funding** to grantees and partners, based on the understanding that local partners are sovereign in choosing how to use their monies in order to change peoples' lives. This includes the freedom to choose the ways of conducting evaluation and the learning process. These donors consider that grantees/partners are best positioned to understand what is required to do in a given context in order to transform the root causes of inequity. In these cases, there are no donor-imposed thematic priorities, or theories of change that may not necessarily be aligned with local leaders, entities, or the networks' assessment of how social change processes should evolve. Some studies recognized that core funding “avoids administrative burden” (including monitoring and evaluation) as a negative factor jeopardizing the impact of social organizations.⁷⁵ However, it is also recognized that core-funding grants are still not evaluated in detail as clear organizational outcomes are not laid-out clearly throughout a funding cycle.⁷⁶

Moreover, some donors are **innovating with new ways of framing the programs**, which are more liberating for grassroots partner organizations. For example, one of the respondents said:

“The rubric (Laudes Foundation’s evaluation framework)⁷⁷ focuses more on outcomes and changes, and how partners are contributing to change, than an attributed outlook.”

On the other hand, Luminate stated:

“We are now testing our new Learning Framework, which allows us to use more diverse methods to collect information while providing the space for meaningful conversations with the teams to reflect on context and change. We are looking for

⁷⁴ A few of the more “flexible funders” we heard of during interviews: **Girls First Fund**, **Nordic Development Fund (NORAC)**, **Laudes**, **Porticus**, among others. It would be interesting to conduct a more in-depth individual analysis and generate case studies and lessons learned looking at these and other donors after completing a full mapping exercise. This process could include the facilitation of dialogue for cross-sharing approaches and ideas.

⁷⁵ INTRAC: Core grants, why everyone is not doing them? <https://www.intrac.org/core-grants-why-isnt-everyone-doing-them/>

⁷⁶ Trust Philanthropy:

https://www.citigroup.com/rcs/citigpa/akpublic/storage/public/funding_from_a_place_of_trust.pdf?ieNocache=749

⁷⁷Laudes Foundation, Rubrics: <https://www.laudesfoundation.org/grants/rubrics>

long-term evaluation partners rather than just mid-term and end- of project evaluations.”⁷⁸

At times, when establishing “learning partnerships” with each grantee and/or funding process, some donors invest in the recruitment and contracting of long-term learning partners, focusing on proximate and continuous development evaluation and moving away for mid-term and final exercises. For example, in their multi-state project on Community-Based Pro-poor Initiatives Program (CBPPI), the UNDP-Government of India conducted a community-led evaluation, where 26 project beneficiaries, mostly women, were trained to lead the evaluation process. They were involved in designing the indicators, facilitating the use of tools, and presenting the findings. By challenging conventional wisdom on evaluations, this process prioritized field knowledge and flattened hierarchies, channeling the resources toward community development.⁷⁹

Additionally, other donors are becoming better at enabling horizontal partnerships. As mentioned before, this means creating local and national mechanisms with the participation of local stakeholders that play the important role of co-monitoring the donors’ strategy and plans in the country. These mechanisms act as vital entities for consultation and feedback, generating opportunities for citizens to promote mutual accountability and support impact investments. In this sense, for example, UNICEF in Bhutan has established a country-wide Youth Steering Committee that continuously supports the work done by the agency by providing feedback, a space for mutual accountability, and improving local work according to the youth diverse realities.⁸⁰ This research did not encompass a complete global assessment of similar mechanisms; it would be important to do this in a subsequent research phase, including in-depth case studies.

We also observed how some donors are more open to the data collected not being quantified but subjectively analyzed at different levels, including by work partners and the local teams. For example, we noted accounts of evolving increased openness to the use of **qualitative indicators and “storytelling”**⁸¹. For these donors, this is an innovation that leads to listening more openly about social change processes, including diverse narratives during evaluation and learning processes. However, this does not necessarily lead to accountability and responsiveness to communities. Reports filled with interesting stories might only be shared with donors’ teams and not at the local level.

Finally, some donors have opted for **limiting requests for reporting and evaluations**. These donors prefer partners and grantees not to be “burdened” with evaluation requirements so that they have the time, the space and the resources to do the “real change work.” In these cases, trust is an important factor: donors believe in the power and work on change of grantees and partners.

⁷⁸ A short blog summarizing the new Luminare evaluation framework can be accessed here:

<https://www.itad.com/article/embedding-systems-thinking-in-daily-learning/>

⁷⁹ Banerjee, Preece, Joseph, (2015), Making people count: from beneficiaries to evaluators. In Thomas, Narayanan (Ed.) *Participation Pays: Pathways for post-2015*, Rugby, UK: Practical Action Publishing

⁸⁰ See more about UNICEF Bhutan here: <https://www.unicef.org/bhutan/adolescent-development-and-participation#programme-solution>

⁸¹ For example, the Asian Development Bank published a guide to Storytelling, distinguishing it from mere “reporting”: <https://www.adb.org/sites/default/files/publication/27637/storytelling.pdf>

While some considered that “less monitoring and evaluation requirements means more impact,” others highlighted the risks of not committing to developing solid participatory evaluation. Without participatory evaluation, donors face the probability of invisibilizing communities, not providing the space and resources to listen to and respond to the demands and perspectives of those directly or indirectly impacted by funded organizations.

Barriers, Challenges, Recommendations, and Opportunities for Impact

The challenge faced by these donors is multiple. One key question is the extent to which grant-makers teams have decentralized operations: are they close enough to grantees in order to have a meaningful dialogue? Similarly, are donors’ evaluation and learning teams able to invest enough time and resources in serious “listening” practices in order to build trust, and harvest outcomes on a regular basis, especially including the varied voices of key stakeholders on the ground (and not just some team members and/or the leaders of the grantee organizations)? Are they able to recruit local evaluators and learning facilitators to support these flexible processes?

Developing and resourcing learning experiments that evolve more in tune with local change processes and that require trust and relationship-building requires donors to re-structure hierarchal organizations while generating and nurturing long-term agreements with diverse local and regional evaluation consultants working closely with multiple grantees.

At the same time, there seems to be an overriding need to invest in documenting these innovations and their possible scalability. Furthermore, there should be a purposeful intention to analyze in depth the pros and cons of each specific innovation, considering, for example, the investment required, to ensure high-quality processes of participatory evaluation and grant-making. As part of this process, South-led organizations, and professionals with grounded expertise in inclusive research should be actively engaged. Finally, more funding would be required to cross-fertilize the lessons learned across the donor community in dialogue with Global South evaluators, grantees, and impacted communities.

The donors we spoke to manifested a strong desire to learn from each other and from social organizations experimenting with participatory research, and to also learn about new and indigenous methods. They also could benefit from learning from Global South actors with strong expertise in democratic and participatory consultative processes in order to improve the initial attempts to make evaluation more equitable. The challenge is to allocate resources to cross-fertilize ideas, break silos, and move away from replicating learning events with the participation of organizations that are not necessarily involved in the innovation and participation space.

HYBRID JOURNEYS OF CHANGE

D. Hybrid journeys with concrete leadership

D1. Evaluation Platforms and Conferences

Evaluation platforms play a significant role in organizing conferences on a regular basis, which can play an important role in establishing the agenda for evaluation practice by bringing together practitioners, scholars, and policymakers to discuss emerging themes, innovative methodologies, and the best practices in the field.

These conferences offer a setting for information exchange, networking, and collaboration, and have the power to shape evaluation practice and policy. Given that some of the most prominent conferences, like those held by the American Evaluation Association (AEA) and European Evaluation Society (EES), are those that have historically been dominated by Global North scholars (increasingly including Global South scholars who have been educated and reside in the Global North), they draw from the established and developed rich body of knowledge and expertise from the Global North. This dominance of Global North perspectives, framework priorities, and methodologies at evaluation conferences has given rise to criticism over the last few years for its role in promoting the power inequalities in evaluation practice and policy.

In short, these conferences and associations are not only important to understand the current focus of the evaluation ecosystem, but they are also vehicles to promote certain dimensions such as equity-oriented principles in the evaluation ecosystem. It would also be important to understand who funds these conferences and for what purposes. Which of these conferences are highly funded and which are not? Who controls decision-making spaces in these associations and initiatives? Undoubtedly, it is essential to monitor these details and provide attentive support to opportunities for equity advocates to take the stage.

Recent global efforts, such as EvalPartners, have made significant progress in building networks and capacities of Global South actors. One such example is The Indigenous Peoples' Conference on Evaluation⁸² at Rotorua, New Zealand in 2019, which focused on the role of traditional knowledge and the importance of cultural paradigms in the evaluation process.

For the past two decades, there has also been a rise in the formation of networks of evaluators in various regions and countries. One example is that of Community of Evaluators⁸³ - South Asia, a network of evaluators from all South Asian countries. The Community has been sharing resources and organizing events and workshops for more than a decade. Similarly, Africa Evaluation Association has been operating since 1999 “in response to Africa’s growing appeal for advocacy, information sharing and advanced capacity building in evaluation.”⁸⁴ They are also organizing conferences, events, and workshops. Similar efforts are being made at country level in the Global South. What is interesting is that there are also offshoots from these communities focusing on inclusive ideologies like feminism or indigenous groups. **Gender and Equity Network South Asia (GENSA)**⁸⁵ works as a community of its own focusing on promoting feminist ideologies; they

⁸² <https://www.evalforward.org/events/indigenous-peoples-conference-evaluation>

⁸³ <https://communityofevaluators.org/>

⁸⁴ <https://afrea.org/who-we-are/>

⁸⁵ <https://gensanetwork.org/>

represent an equity and gender lens in evaluations and give voice to the special challenges in addressing these issues in South Asia.

In general terms, we should consider the option to support and co-organize South-led conferences inviting the North as a means to “turn the table upside-down” and promote South-North and South-South learning more proactively, nurturing the ecosystem in a more dynamic and rich way. There seems to be room to innovate and creatively engage in existing forums while creating and reinforcing new ones.

Barriers, Challenges, and Opportunities for Impact

The discussions at these events and conferences reflect the potential focus of the evaluation ecosystem. As pointed out by many respondents during our research, there is a need to challenge the underlying assumptions that underpin the frameworks, definitions, and theories upon which evaluation theory, practice, and related developments have been founded.

“The struggle is to first find a space for equity issues in these conferences; and even if they find a space, they should not as side events. Even if they find a space, we need to ensure that there is a speaker from the Global South; and even when there is a speaker, we need to ensure the speaker speaks about discrimination and about the issues that are relevant to the Global South.” (Evaluator from India)

While several conferences have recently been organized by the Global South, it is important for these to be given prominence and not consider them as an alternative to the current ways of evaluating. It is imperative to have these diverse voices as key speakers at the most prominent and popular conferences.

D2. #shiftthepower Manifesto: Networks of Community Foundations

Another journey of change seems to be maturing with the co-creation of the [#ShiftthePower A Manifesto for Change](#) in 2019. The manifesto was originally co-drafted by a group of community development activists and practitioners from Sub-Saharan Africa, South Asia, and the UK associated with a network of community foundations. This document is now inspiring many community foundation’s leaders, teams, and partners to promote another way of “doing” international development aid and philanthropy. They said that there are “genuine alternatives of deciding and doing.” For this research, it is relevant to list the key points included in the manifesto and guiding action for change within this philanthropic community:⁸⁶

⁸⁶ Read the full manifesto: <https://www.greengrants.org/wp-content/uploads/2021/04/ShiftthePower-A-Manifesto-for-Change.pdf>

- Move away from a system that is preoccupied with quick “solutions,” and is based on the premise of and organized around the transfer of funds. **Change how we approach, and seek to measure, the notion of success.**
- Creatively find ways to **unlock the inherent power of communities in determining their own development course** –however they define it– and let the language of “beneficiaries” and “recipients” be a thing of the past.
- **Move away from “building capacity” as defined by external actors and requirements** towards community organization and movement building, where “capacity” equates to relevance, rootedness, and constituency.
- Ensure that external funding recognizes, respects, and builds on local resources and assets, rather than overlooking, undermining, or displacing them.
- Expand our horizons beyond money as the central driver of change, and place greater value on other kinds of **infinite non-financial assets and resources (knowledge, trust, networks, etc.)**
- Change the language we use so that it enables new ways of working and thinking, rather than constraining them, and **challenge the dominance of English.**

All the points above are aligned with pivotal directions in the promotion of equity-oriented evaluation and in line with efforts to promote indigenous, inclusive, and locally-led learning and knowledge creation. Even though a 2011 study confirmed that many community foundations are not deliberately and consistently conducting evaluation of their programs,⁸⁷ we also observed a more deliberate interest to reflect on and promote new ways of conducting evaluations. For instance, in the “Shift the Power” website it is possible to access a case study of a community foundation which has developed a new approach to “measuring”:⁸⁸

“The Pemakna (an alternative method to measure) is recognized as part of our community of enablers. We define the process of pemaknaan as a process-in-dialogue that builds a contextual understanding, provides affirming recognition, and engages with critical-constructive observations regarding efforts initiated by partner organizations and their respective communities. This process intends to strengthen, in reflective and strategic ways, the potential of success for achieving transformative change by social movements.”

In late 2023, a new #ShiftthePower and community foundation summit will take place in Colombia. During our research, we observed increasing interest in promoting new ways of doing when conducting an evaluation.

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⁸⁷ The role of evaluations in community foundations (USA): <https://scholarworks.wmich.edu/cgi/viewcontent.cgi?article=1480&context=dissertations>

⁸⁸ See details of this approach at: <https://shiftthepower.org/2022/11/28/measuring-what-matters-one-pemakna-at-a-time/>

A complete mapping and assessment of the approach used by community foundations to evaluate is beyond the purview of this research. However, we would like to note that this is an important grouping and a flexible movement of important philanthropic actors that might be worth exploring further.

E. Hybrid journeys spearheaded by diverse organizations

E1. Networks of progressive and feminist donors

During the research process, we also captured evidence of a growing tendency of groups of donors coming together, organizing, and mobilizing around a set of distinguished “progressive” principles. Even though they are not necessarily and directly linking their actions towards enhancing equity-oriented evaluation, it should be noted that these groupings are dedicating resources to enhance their level of knowledge and self-reflection to promote emancipatory philanthropic practices. As they do so, they are also leading communication strategies and nurturing spaces for learning and training geared to expanding the application of principles aligned with liberation theories and other ideological frameworks and practices, including feminism and racial justice.

For example, several women's funds are getting together in networks such as Prospera.⁸⁹ Prospera is a global hub of 44 women's funds, seeking to create opportunities for greater collaboration. They are present in 178 countries and passionately evolving as a collaborative network creating chances for grantmakers to develop their technical skills and mobilize resources with the clear vision of safeguarding women's rights. On their website, Prospera indicates that their values and principles include those of “diversity and inclusion,” and “flexibility and responsiveness” among others, all of them relevant to the promotion of equity. During this research, we did not interview them. However, in the future, it would be interesting to think if and how the network might be open to evolving capabilities and thinking in relation to equity-oriented evaluation.

Similarly, feminist theory and principles are also more consciously incorporating openness to undertake more original proposals as to how best to do “learning” with communities and partners. For example, one of the most prominent feminist donors told us:

“We are applying feminist principles to construct our baselines and the evaluations. This means that participation and sound consultation at all levels – with our partners, communities, Board, and staff– are a must to devise an evaluation strategy.”⁹⁰

⁸⁹ See Prospera website: <https://www.prospera-inwf.org/#!/-home/>

⁹⁰ As per their own description in the methodology section, Mama Cash Baseline report was produced using Participatory Action-Research Methods (see more about PAR principles in the section on Global South Journeys of Change)

Women funds from all around the world are sharing lessons learned on planning, evaluation, and learning, proactively facilitating emancipatory grantmaking initiatives. This includes the involvement of grassroots activists and social movements' representatives in the decision-making bodies with the legitimacy required to make grounded and context-relevant decisions. For example, the Red Umbrella Fund has sex-workers seating at the decision-making table, embracing the principle of “nothing about us without us.” In their own words, and per their website:⁹¹

“Only when sex workers have a real seat at the table in funding decisions can real change be achieved. Our participatory and activist-led model, which was designed by sex workers and which has sex workers in the majority in our strategic decision making and grants selection bodies, is central to making this vision a reality. Sex workers’ leadership in strategy and grants decisions promotes transparency and accountability to the sex workers’ rights movement, and makes sure our funding is well directed. We facilitate sex workers’ leadership by providing language support to sex workers who are not English speakers, conducting one-on-one orientation sessions, offering (peer) mentorship and learning opportunities, and respecting community activists’ lived experiences and expertise.”

Similarly, the “Fondo de Mujeres del Sur,”⁹² the “Brazil Human Rights Fund”⁹³ (started with an endowment from the Ford Foundation), or the “Baoba Fund”⁹⁴ (started with an endowment from the Kellogg Foundation), and many others, are promoting hybrid and co-leadership models where activities and social leaders have a central and pivotal role in establishing strategic plans and, therefore, evaluation guidance.

Another actor, the “Network of Engaged International Donors,”⁹⁵ seems to be a relevant player to watch. On their website, they state that:

“Since 2020, NEID Global has more deeply and intentionally engaged in diversity, equity, and inclusion work within our organization. We began our journey by talking to over 40 individuals involved in equity and diversity work globally and across the country to establish what we might uniquely be suited to do on these issues. We then integrated current critiques of global philanthropy into our programming and made a commitment to showcasing diverse perspectives in all of our programs, especially the views of those who are most proximate to the problems they wish to solve.”

They are convening multiple learning events in partnership with social organizations and movements (including, for example, Black Lives Matter) in order to inspire a grantmaking process

⁹¹ <https://www.redumbrellafund.org/sex-workers-leadership-in-grantmaking/>

⁹² Fondo de Mujeres del Sur website: <https://www.muieresdelsur.org/en/home/>

⁹³ Brazil Human Rights Fund website: <https://www.fundobrasil.org.br/en/who-we-are/>

⁹⁴ Baoba Fund website: <https://baoba.org.br/en/>

⁹⁵ See the NEID website: <https://www.neidonors.org/>

that works around the principles of “allyship and justice” rather than only “charity,” “responsibility” or “aid” as concepts that reinforce structural and historical power asymmetries. On their website, they offer “toolkits” that are useful and relevant to equity-oriented evaluation. For example, it is possible to download a toolkit designed by the “Black Lives Matter” movement which seeks to support grantmakers in their tactics to work in “allyship.”⁹⁶ They also directly share information about local partners in diverse countries in order to promote partnerships with those directly affected by conflicts or crises.

Even though the focus of some of their resources is the US public, they offer interesting insights into a cross-cultural collaboration to end systemic racism and are open to a journey towards understanding the historical roots of discrimination, including slavery and colonialism, as the system that enabled it. It would be interesting to explore their understanding of equity in the evaluation of their funded programs and their willingness to promote a power shift with partners around the world.

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This research did not encompass a complete mapping and assessment of these types of emerging networks of donors. However, we would like to point out that this is an important trend that might be worth exploring further.

Specifically, it seems essential to have a close look at feminist networks, which are becoming very active in the public space, and invest significant resources in nurturing “out-of-the-box” approaches to mainstream learning and evaluating. It would be very important to consolidate partnerships and cross-fertilization with these networks at the regional, global, and South-South levels.

E2. South-to-North Capacity Building in Evaluation

Efforts are being made in the Global South to develop capacity-building communities in the Global South (South-to-South) and North (South-to-North).

For instance, Praxis Institute for Participatory Practices has been organizing an International Workshop⁹⁷ on Participatory Methods and Approaches for 25 years now, which is attended by evaluators and researchers from the UK, USA, and Canada along with those in the Global South. There is surely a larger number of South evaluators and organizations promoting locally relevant approaches and methods in local languages, but they are not resourced or mainstreamed into the wider narrative of the “global” evaluation ecosystem. Nevertheless, what is lacking is a cohesive

⁹⁶ Toolkit can be downloaded here:
https://docs.google.com/document/d/13wXNzKfhz3Z5v226qVsmFgdPw8z8O_xqevSO1YGESvO/edit

⁹⁷ <https://www.theworkshop.in/>

program that looks at capacity building as integral to wider network-based advocacy and publishing initiatives.

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This research did not encompass a complete mapping and assessment of these types of South-to-North capacity building processes in evaluation. However, we would like to note that this is an important reality that might be worth exploring further. The Praxis Participatory Workshop could be further scaled up in collaboration with partners across different regions to help shape a more equitable and more progressive evaluation ecosystem.

E3. Made in Africa Evaluation

The Made in Africa process and grouping might be one of the most interesting phenomena to watch closely. This is because they are explicitly coming together to openly challenge the “epistemic violence”⁹⁸ perceived in mainstream evaluation, including that developed by United Nations agencies supposedly interested in inclusion and respect for diversity.

We considered this is a “hybrid” journey because the network was initially convened by the African Evaluation Association (Afrea) and the Bill and Melinda Gates Foundation. In this initial event, participants explored their dissatisfaction with the implementation of evaluation theory and practice based on a philosophical paradigm from the Global North. They recognized and openly agreed to challenge “*the reliance on the dominant paradigms from the Global North for commissioned evaluations, monitoring and evaluation systems,*” and openly denounced that “evaluation education does not attend to the intricate contextual issues shaped by societal cultures, traditions, and priority needs of people in the Global South.”⁹⁹ The group also denounced that, beyond superficial rhetoric, donors and agencies are not really supporting a strategy for an **equitable epistemic approach** to plan design and evaluation: this is identifying and developing a uniquely African approach to evaluation. The emphasis of Made in Africa –similarly to other tendencies promoting political, critical, and participatory learning and evaluation– is that closeness to context, culture, and history (while embracing beliefs and subjectivity) is relevant for research. The group celebrates “the emergence of culturally responsive evaluation, multicultural validity, and decolonizing and indigenous methodologies” and considers culture in every section of the evaluation framework. More precisely, Made in Africa evaluation approaches consider that:

1. The social location of the evaluator matters.
2. Evaluators play a role in furthering social change and social justice.
3. Avoiding ethnocentrism means embracing multiple cultural perspectives.

⁹⁸ See *Made in Africa Evaluation Frameworks, Addressing Epistemic Violence and contributing to social transformation*: <https://static1.squarespace.com/static/58063ab215d5db704f249787/t/639625b25ce887045695cae4/1670784434259/ChilisaMertensIndigTransf.pdf>

⁹⁹ See *Towards defining and advancing Made in Africa Evaluation*: <https://idev.afdb.org/sites/default/files/Evaluations/2020-03/article%204%20Towards%20defining%20and%20advancing%20E2%80%9CMade%20in%20Africa%20Evaluation.pdf>

4. Culture is central to the evaluation process because of “the profound way in which culture (including racial and ethnic identity, social origin, class background, etc.) shapes worldview, values, and norms, and thereby impacts the uses of, reactions to, and legitimacy of, any evaluation.”
5. Culturally and ethnically diverse communities have contributions to make in redefining the evaluation field.

These premises are relevant for the inclusivity required for equity-oriented evaluation. It is yet to be seen how they are applied in practice and if donors funding African initiatives consider them essential in their day-to-day work.

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During the focus groups with diverse evaluation platforms, we heard from professional evaluators (many of them offering their services as consultants) that for these principles (or similar ones) to be really applied, there are some pre-conditions:

- Professional evaluators and donors should be more open to working with activists and social leaders with strong capabilities and vision to promote grounded learning. This openness is necessary for the cross-fertilization of learning and the establishment and facilitation of diverse cross-sectoral and organizational alliances.
- Donors should truly commit to internal change and apply progressive, inclusive and equity principles in their evaluation practices; otherwise, the new generations nurtured under the Made in Africa (or any other alternative) paradigm will not have the chance to share their vision and expertise (i.e., they will not be contracted)

Another possible challenge is the belief that “indigenous” knowledge is only relevant in one region of the Global South and that the oppression and liberation from “epistemic injustice” is not a system-wide problem affecting all formerly colonized regions. In this sense, a cross-regional approach should complement regional strategies and tactics regardless of whether a given donor is prioritizing one region or another.

This research did not include a complete mapping and assessment of Made in Africa as an evolving regional phenomenon. However, we would like to point out that this is an important space that might be worth exploring further.

F. Hybrid Principle-Based Journeys

F1. Decolonization and Reparations (No-Aid)

As the localization agenda increases its influence within the international cooperation space, the “decolonization” agenda is also gaining traction and visibility.

There is an ongoing debate as to the similarities and differences between one and the other. In this section, we highlight them while describing emerging trends and debates that are affecting the evaluation agenda.

In terms of comparing localization and decolonial narratives, we would like to highlight that the decolonization agenda shapes its narrative and change proposal by recognizing –without euphemisms– the historical exploitation of the Global South countries and its peoples: black peoples enslaved and taken from Africa to Latin America and the Caribbean, several ethnic and indigenous groups and multiple marginalized groups emerging from the mix of multiple identity groups across the five centuries of imperialism and colonization.

“Decoloniality refers to the logic, metaphysics, ontology, and matrix of power created by the massive processes and aftermath of colonization and settler-colonialism. This matrix and its lasting effects and structures is called “coloniality.” More plainly said, decoloniality is a way for us to re-learn the knowledge that has been pushed aside, forgotten, buried or discredited by the forces of modernity, settler-colonialism, and racial capitalism”¹⁰⁰.

Moreover, the decolonization vision recognizes the exploitation and extraction of natural resources of rich Global South countries as key enablers of the industrial revolution as well as the current financial and industrial socio-economic model, and even worse, the current climate change emergency. This process has depleted the world's resources, exterminated local populations and cultures, and excluded large parts of the now impoverished population living in crowded cities, while creating the current financial and economic imbalance (briefly summarized in the “Setting the Context” section above.)

On the other hand, “localization” mainly looks at a given institution “agency” to get closer to the “local,” paying attention to the donors’ individual organizational decisions without any attention being paid to the wider complex history and context. This is clearly described in the “Decolonization and Localization Report” resulting from an open consultation facilitated by Peace Direct, including the participation of the Global Change Center and many others:¹⁰¹

“Localization put emphasis on the engagement of local actors in humanitarian coordination structures around Global North actors and their decision-making power, rather than centering the power in Global South actors. It implies that Global South actors remain passive recipients of the discretionary goodwill of Global North actors who have to consider how to engage with Global South actors, even though Global North actors are visitors and guests in the Global South.”

In turn, decolonization advocates state:

¹⁰⁰ Geo Maher. Boston Institute for Social Research

¹⁰¹ See *Localization and Decolonization: the difference that makes the difference*: <https://www.peacedirect.org/wp-content/uploads/2022/10/PD-Localisation-and-Decolonisation-Report-v3.pdf>

“Decolonization means deconstructing and dismantling colonial-era and neo-colonial ideologies of the superiority and privilege of Western thought and approaches.”

In this sense, it is considered that transformation of the system cannot take place without an acknowledgment of the way in which structural racism is both embedded in the system and how it has evolved in all international interventions. Of course, this transformation cannot take place without the active participation of Global South actors.

These structural and systemic conditions are carefully taken into consideration when advocates and supporters of the “decolonization paradigm” make proposals regarding international cooperation initiatives.¹⁰² Here, we would like to highlight a few concrete efforts in this direction and showcase how they might inform reconfigurations in the evaluation practice.

First, we would like to recognize some countries' and key actors' pledges to move away from “the idea of aid to the idea of reparations.” For example, the recent climate change “Loss and Damage Fund,”¹⁰³ approved during the latest Climate Change Conference (COP27), seems to be moving in this direction. In a reparation fund, the original problem is recognized as having been created by North and richer countries. In this sense, there is no attempt to develop solutions based on pre-conditions, pre-defined criteria, and the external imposition of priorities: countries must first take responsibility of their past and present wrongdoings. Without pre-defined theories and their indicators, what remains is a space for more flexible and context-relevant action in response to the voices of those directly affected by diverse problems, with the dignity of the local actors restored through the open recognition of the responsibilities towards one another.

Also, regarding reparations, several Caribbean countries (such as Barbados) strongly advocate for a more radical change and reparations for slavery.^{104 105} They expect donors to go beyond providing aid and engage in truth-telling processes, and offer formal apologies, and final reparations in various forms. The Caribbean Community and Common Market (CARICOM) efforts in this regard are commendable.¹⁰⁶ It is important to highlight that a large portion of the Latin American and Caribbean population is of African-descendant and still lives in poverty or extreme poverty.¹⁰⁷

¹⁰² See Time to Decolonize Aid: <https://www.peacedirect.org/publications/timetodecoloniseaid/>

¹⁰³ Information on the Loss and Damage Reparation Fund: <https://www.unep.org/news-and-stories/story/what-you-need-know-about-cop27-loss-and-damage-fund> and about “Climate Reparations” https://en.wikipedia.org/wiki/Climate_reparations

¹⁰⁴ Reparations for slavery is the application of the concept of reparations to victims of slavery and/or their descendants. Reparations can take numerous forms: affirmative action, individual monetary payments, settlements, scholarships, waiving of fees, systemic initiatives to offset injustices, land-based compensation related to independence, apologies and acknowledgements of the injustices, token measures, such as naming a building after someone, or the removal of monuments and renaming of streets that honor enslavers and defenders of slavery.

https://en.wikipedia.org/wiki/Reparations_for_slavery#:~:text=He%20estimates%20a%20fair%20reparation,to%20%2414.2%20and%20%2417.1%20trillion.

¹⁰⁵ Liberation starts at home, Cecilia Milesi: <https://www.cdacollaborative.org/blog/liberation-starts-at-home/>

¹⁰⁶ See CARICOM Reparations commission website: <https://caricomreparations.org> including a 10-point reparation plan that also includes tax justice demands as a means to transform power asymmetries between the formerly colonized South and the Global North.

¹⁰⁷ According to the World Bank, Afro-descendants in Latin America are 2.5 times more likely to be chronically poor than whites or mestizos (a person of a combined European and Indigenous American ancestry). In Brazil, Colombia, Ecuador, Panama, Peru, and Uruguay combined, Afro-descendants represent 38% of the total population, with about half of all the people living in

Reparations payments are, thus, not emanating from closed-door decisions in Board/teams rooms or strategy workshops where plans (and evaluation plans) are pre-established. Donors such as Luminate, the Ford Foundation, Open Society Foundations (OSF) and others are proactively funding their self-organization to advocate for Afro-descendants' rights, supporting actions to increase their voices in local, national, and international spaces.

CARICOM efforts are in line with the 2016 United Nations Working Group of Experts on People of African Descent, which observed that the US should pay people of color reparations for a history of 'racial terrorism.' This group of experts, which included leading human rights lawyers from around the world, highlighted the active link between present injustices and the US dark past. Also, in March 2019, the European Parliament voted overwhelmingly to address structural racism faced by an estimated 15 million people of African descent, declassify colonial archives and consider "some form of reparations" for colonial-era crimes.¹⁰⁸

Having said that, it is important to note that feminists are also advocating for the holistic and structural understanding of the historic root-causes of exclusion and discrimination. Consequently, these ideological groups are getting closer in their organization and stance with relation to several issues, including international cooperation policies and practices.

An emerging and noteworthy trend is linked with more wealthy families, company owners, and donors joining forces with decolonization and reparation advocates. They are paying reparations,¹⁰⁹ issuing public apologies statements,¹¹⁰ and calling for a "decolonization of wealth."¹¹¹

This movement –together with the activation of climate change– is generating the space in Global North academics, activists, and policy circles to re-discover authors exploring post-development, dependency theories and other critical narratives that de-construct idea of growth as a linear, extractive, and output-oriented mainstream paradigm informing the mainstream international cooperation agenda today.¹¹²

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extreme poverty. They have fewer years of education, are more often unemployed, and are "vastly underrepresented" in public and private decision-making positions (World Bank Report, Eliminating Afro-Descendent Exclusion in Latin America is vital for Development: <https://www.worldbank.org/en/news/press-release/2018/08/29/eliminating-afro-descendant-exclusion-in-latin-america-is-vital-for-development>)

¹⁰⁸ See more: <https://www.theguardian.com/world/2019/mar/26/meps-pass-watershed-resolution-action-against-structural-racism-people-african-descent>

¹⁰⁹ See for example the story of this UK family: <https://www.bbc.com/news/world-latin-america-64527709>

¹¹⁰ See the example of *The Guardian*: <https://www.theguardian.com/news/2023/mar/28/guardian-owner-apologises-founders-transatlantic-slavery-scott-trust>

¹¹¹ See "Decolonization of Wealth" website: <https://decolonizingwealth.com/>

¹¹² It is not possible to provide a full account of these theoretical critical frameworks in this report. Nevertheless, we strongly recommend Prebisch, Singer, Boaventura Santos, Amin, Rodney, Ohno, Namkoong, Mbembe, Maldonado Torres, Arturo Escobar, and Cusiyanqui, among many others. See more in our joint literature review spreadsheet of recommended readings both in English and Spanish.

This conversation is creating tensions, controversies and opportunities for reflection for action. We would recommend carefully taking this evolving debate into consideration when considering how to adjust positions and offer examples for funding and/or policy influencing.

GLOBAL SOUTH-LED JOURNEYS OF CHANGE

G. Global South-Led Journeys with Concrete Leadership

G1. South-South Cooperation

South-South cooperation (SSC) is both a framework and a political call for developing nations and Global South actors to strengthen collective self-reliance and share best practices to address common challenges.¹¹³

The South-South agenda has been crafted by 135 countries from the Global South associated with the G77 and China¹¹⁴ in dialogue with all UN General Assembly members. The origins of South-South Cooperation can be traced back to the Bandung Conference¹¹⁵ –the first large-scale policy conference organized by recently decolonized countries including several African and Asian countries such as Egypt, India, and Indonesia. Since then, Global South countries have organized and promoted joint and coordinated policy action in the United Nations and other multilateral formal and informal policy dialogues. This includes, for example, joint work with the Non-Aligned Movement¹¹⁶ but also the promotion of Southern networks of think tanks¹¹⁷ fostering sovereign and alternative knowledge creation on diverse issues, including trade, economic and social development, peace and security, technology development, or education. South-South Cooperation is increasing its role and prominence, mobilizing diverse Global South actors that are exhausted of following imposed ways of working defined by the North. This momentum was reinforced more recently during the successful second “United Nations Conference on South-South Cooperation (BAPA +40)” held in Buenos Aires, Argentina in early 2019.¹¹⁸

What is relevant to this research on equity-oriented evaluation are the key principles guiding South-South Cooperation initiatives and how they are positioned within the international cooperation ecosystem as challenging North-South and OECD-DAC-sponsored standards and principles, guiding mainstream evaluation policies and practices (as discussed in the sections above.) South-South cooperation has been discussed as an existing alternative to the traditional cooperation paradigm that holds vast potential for further expansion, especially through its

¹¹³ See more details in Cecilia Milesi’s articles: <https://www.asiaglobalonline.hku.hk/for-a-truly-global-peace-agenda-in-a-multipolar-world/> and <https://www.unssc.org/news-and-insights/blog/role-south-south-cooperation-realizing-vision-peace-and-development-all>

¹¹⁴ See G77 + China website: <https://www.g77.org/>

¹¹⁵ About the Bandung Conference: <https://history.state.gov/milestones/1953-1960/bandung-conf>

¹¹⁶ About the Non-Aligned Movement: https://en.wikipedia.org/wiki/Non-Aligned_Movement

¹¹⁷ The Global Coalition of Networks of South think-tanks: <https://my.southsouth-galaxy.org/en/solutions/detail/south-south-global-thinkers-the-global-coalition-of-think-tank-networks-for-south-south-cooperation>

¹¹⁸ Document on BAPA+40 -process and outcome: <https://unsouthsouth.org/bapa40/>

evaluation practices. Regarding the dynamics and mechanisms of South-South cooperation, several points have been raised in the interviews conducted for this research, as follows:

- The underlying principles of SSC differ from the vertical logic of North-South cooperation. SSC promotes mutuality, meaning the horizontal interaction of cooperation partners. The demand-driven nature of cooperation (i.e., without donor conditionality and pre-established funding criteria) informs the overall project design, resource distribution, and especially the evaluation practice. As stated by one of the interviewees:

“More importantly, evaluation in accordance with SSC principles focuses on “WHAT we evaluate, and WHAT FOR → the vision of long-term transformation is embedded into evaluation practices, as opposed to short-term output evaluation in North-South initiatives (HOW we evaluate.)”

A recent study¹¹⁹ exploring South-South Cooperation evaluation practices and “process principles” emphasized the importance and differential as well as complimentary nature of South-South principles in relation to North-South ones and equity-oriented evaluation. By way of example:

- The SSC Cooperation principle of respect for national ownership (i.e., funding should be aligned to national strategic priorities) could be linked to the principle of ownership, which is also important for equity-oriented evaluation.
- Equality is directly linked to the horizontal aspect of SSC engagements, including working by consensus, trust, and flexibility.
- For Global South actors, it is important to identify what is more important to a host country, thus placing great importance on context and relevance.

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One of the main challenges for SSC is its limited resources. Compared to North-South Cooperation, the amount of resources available for SSC projects is very small, and therefore, the share that is invested into evaluation is also small.

Moreover, SSC is not only based on financial resources but it also requires a multiplicity of resources that address more holistic project goals, i.e., long-term goals for transformation, and especially technical resources for implementation. At present, the lack of resources and technical capacities lead to an outsourcing of evaluation to Global North agencies whose services are still expensive, and in addition apply a Eurocentric view/conception of evaluation. The South-South Iberoamerican Report is produced quite regularly to visibilize and monitor the increasing numbers of South-South endeavors. However, it still strongly focuses on outputs and quantifiable indicators.

¹¹⁹ See the study here: <https://www.undp.org/sites/g/files/zskgke326/files/2022-12/UNDP-Seoul-Assessing-Development-Effectiveness-for-SSC-2022.pdf>

During the joint reflection sessions facilitated for this research, we also heard about the challenges resulting from the power asymmetries affecting relations in and with Global South countries. For example, South Africa is now investing in international and regional cooperation initiatives in less developed countries such as Malawi. In doing so, South Africa seems to be asserting power and somewhat imposes certain ways of doing things without full attention to and respect for the local partners. Power differential across the Global South spectrum requires attention to naïve narratives regarding the Southern “space.”

H. Global South-Led Journeys Spearheaded by Diverse Organizations

H1. Resistance, Alternatives to Mainstream Practices and Diverse Experiences of Global South Collectivization

As we listened to more Global South actors, we collected accounts on how, against all odds, Global South organizations are resisting the mainstream evaluation paradigm. This resistance was expressed by some organizations trying to test diverse types of indicators to measure their impact and social change power. They do this with or without the acceptance of their donors or financial support. For example, the “Red de Educación Popular” (REPEM LAC)¹²⁰ developed “living well” indicators at a large scale (*indicadores del buen vivir*), a tool created from the grassroots involving and in dialogue with women across Latin America. The “Buen Vivir” paradigm is a wholesome understanding of development recognizing the rights of Mother Nature as part of the diverse social groups, enshrined in the Bolivian National Constitution and other national constitutions in the Global South. REPEM LAC positioned itself in alignment with feminist and popular education values and guiding principles, coordinating their actions across the region, and valuing their ancestral, collective, and sovereign knowledge production and management experiences.

Similarly, we noted the case study of Consejo de Educación Popular de American Latina y el Caribe (Latin American and the Caribbean Popular Education Council, CEAAL),¹²¹ a network of networks and organizations with expertise in popular education. They developed a diploma for capacity-building that uses different training approaches such as “learn-by-doing” or “action-learning,” inspired by Paulo Freire's pedagogy.¹²² The diploma is highly participatory and interactive. Red Alforja¹²³ is another network which, together with GRADE¹²⁴ (The Group for Analysis of Development, Peru, LatAm, and the Global South) and many others, expands the use and knowledge of participatory and critical action-research despite the fact that alternative approaches might not be necessarily used by most donors.

¹²⁰ Red de Educación Popular website: <http://www.repem.org/>

¹²¹ CEAAL website: <https://ceaal.org/v3/>

¹²² Popular education in a nutshell: <https://www.preventconnect.org/wp-content/uploads/2015/02/What-exactly-is-Popular-Education-Learnng-Heads.pdf>

¹²³ RED ALFORJA website: <https://redalforja.org.gt/>

¹²⁴ GRADE website: <http://www.grade.org.pe/en/>

Overall, it should be noted that popular education networks and different types of associations are still very strong in Latin America and continue to inspire Participatory Action-Research models of research.

Figure 2: Principles of Participatory Action Research

Epistemological:

- Breaking the duality of subject and object of research as the participants become actors that are capable and central to decision-making in the research process.
- Everyone's viewpoints and opinions (i.e., knowledge) matter, but the views of those most affected by the problem are at the center as they have a deeper understanding of the context.

Political:

- The ultimate purpose of the research is the transformation of reality in a way that is beneficial to those citizens most affected by a problem.
- Ownership of the research process in itself allows for strengthening civic engagement and democracy.

Methodological:

- Based on methods that allow for meaningful participation and take the understanding and questioning of power structures as a starting point.

Another remarkable example is provided by Slum Dwellers International,¹²⁵ which is developing an approach to sharing knowledge and strengthening South-to-South capacities for associations at multiple levels: as the savers travel from Cape Town's Sheffield Road to Kenya's Mukuru Sinai to India's Pune, the network is unified and strengthened. This learning takes place not only at the street level but between towns, regions, provinces, and nations, and is documented continuously to account for emerging impacts on the move.

As the efforts to advance South-led, critical approaches to research and evaluation are sustained, these organizations, at times, join forces with critical thinkers and advocates from all around the world, including all the organizations that form part of this South-led partnership, to explore equity-oriented evaluation (see the complete list of partners above.)

At the same time, as these organizations working on the margins continue to mobilize and do their work while always respecting their principles, single organizations, on a day-to-day basis,

¹²⁵ Slum Dwellers International website: <https://sdinet.org/>

deny the disbursement of funds when they are attached to conditionalities and pre-defined targets¹²⁶. We heard several stories about this daily struggle and about the demanding negotiations and trade-offs that local organizations must go through and endure.

This research, with limited resources and space, is not even close to accounting for dozens of studies as the ones above. However, it would be unfair to fail to mention that these lived experiences are essential proof that, against all odds, change is promoted every day from diverse Global South positions and locations. It would be wonderful to map more in-depth a selection of these case studies to showcase and visibilize them globally as concrete options and a way forward.

I. Global South-Led Principle-Based Journeys

II. Diverse Experiences of Global South Collectivization

Finally, we would briefly like to note that there are multiple experiences of collectivization in the Global South that are promoting critical alternatives and bottom-up ways of working. Some of these groups meet regularly in different spaces, including the World Social Forums, but there are also other networks and groupings that are too many to list here. We recommend looking at these processes more closely as a source of innovation and tested-solutions to inequitable practices in international cooperation. All of them deserve more recognition and should be celebrated worldwide.

Barriers, Challenges, and Opportunities for Impact

The resistances, alternatives, and experiences of collectivization from and in the Global South – as very briefly summarized above – seem to be sharing similar barriers: they lack the funds to document their practices and options tested in multiple languages; they do not have the necessary resources and support to scale up the options. Because of this and other reasons, they struggle to sustain their practices in the long term.

Probably, the most important challenge to be considered for this report is the fact that the Global South is rarely offered the opportunity to document its ways of working and methodologies in different languages in order to share knowledge and impacts with donors and other similar organizations located in different continents. Besides, resources for sound and participatory documentation, cross-regional and cross-organizational learning and collaborations are complex and quite expensive, and it is difficult to pay for the required translation, facilitation, documentation and other services that are not typically included in budgeting processes. As mentioned above, if this is coupled with the fact that funding for capacity building and knowledge

¹²⁶ For example, SAHAJ (<https://www.sahajcorporate.com/>) takes a stand and stops collaboration if evaluator not aligned with organizational values; FunsalProdesse (<https://funsalprodesse.org.sv/>) have pushed against donors' top-down evaluation requirements; the Bolivian Ministry of Health pushed out the Global Fund for HIV, TB and Malaria because they were not complying with ministerial guidelines and underestimated the knowledge and capacities of Bolivian civil servants, etc.

sharing seems to be directed from mainstream donors to organizations enabling the replication of mainstream principles and approaches, then the challenge becomes enormous.

This South-to-South action-research initiative was crafted as a potential chance to demonstrate the value of generating cross-regional learning, to inform a different type of system-change strategizing. We are pleased to present below a few initial recommendations for change aligned with our long-standing commitment to promoting participatory and critical evaluation and research, well grounded in the diverse voices of Global South actors.

OUR COMMITMENT AND RECOMMENDATIONS

BACKGROUND

As a South-to-South collective with expertise in participatory, emancipatory, power-aware, and bottom-up learning processes, our aim was to facilitate a research process oriented to activating a transformative change process affecting the broad evaluation ecosystem as a key pillar of the international cooperation industry.

With this in mind –and understanding from the RFP that the Ford Foundation is also embracing the opportunity to promote a shift in power, acknowledging the momentum and a global call for equity and justice– we submitted a proposal co-designed around the principles of action research. This means that the listening process was also oriented to gathering ideas and recommendations for change, while building a social infrastructure –our South-South partnership–to get ready, together, to advocate for and mobilize for equity. As we moved through the last few months, we reflected on the ideas that arose from the interviews and focus groups and discussed them among ourselves and with the Ford Foundation in several online and in-person sessions. This joint reflection allowed us to deepen our own understanding of the complexity of the problem, as it helped us to open our minds regarding how a long-term process influencing change could be facilitated. Considering this, in this section, we briefly present the main recommendations that arise from this first part of the research process. They are presented to stimulate reflection for further action at a later stage.

By considering the unique historical, cultural, economic, and institutional factors that shape the evaluation ecosystem, our recommendations aim to promote more effective and meaningful evaluations that are better aligned with the values, rights, and needs of the communities they serve. This, for us, is equity: addressing unfair power asymmetries to better serve communities and enhance their rights to justice, voice, and dignity. Therefore, evaluation frameworks should be tailored to the South's and the most excluded unique context and values.

Our report argues that the current dominant frameworks that focus on narrowly defined principles and indicators of ‘success,’ ‘impartiality’ and ‘(North-led) development’ have led to the silencing and exclusion of a number of actors in the ecosystem by way of decisions made at the policy, organizational, methodological and dissemination level. These actors include Global South evaluators, the local, communities, evaluators representing diverse ideologies, guided by (many times) “not mainstream” action-oriented principles, and implementing agencies and local partners at all levels of the evaluation ecosystem. The journeys of change discussed in this report are just a few examples of the steps taken by diverse actors in the evaluation ecosystem, both from the Global North and the Global South, that acknowledge the complex nature of the work in terms of development and are implementing initiatives to change the status quo. As of now, our presentation of the journeys has been kept at the descriptive level. To reflect in depth on how much each one of them is aligned towards the vision of equity is something to be done as a next step, in a safe and caring space, to nurture critical thinking and strategizing to influence change.

As part of this study, another overarching objective among the Global South partners was to build a Global South Solidarity network that can have a dialogue with the mainstream evaluation ecosystem from feminist, anti-colonial, anti-caste, and anti-capitalist frameworks. As a collective, we feel more ready to implement this process after this initial step. Below is a visual representation of the work we would like to continue facilitating:



We acknowledge that these are initial emerging recommendations. We aim to continue this action-research process on equity-oriented evaluation beyond this first stage. Our purpose is to evolve and implement the recommendations below and others that might emerge as we exchange with key stakeholders as well as the readers of this report in the Global North and South.

Please, do connect with us!¹²⁷

RECOMMENDATIONS

1. Rethink and adapt the values and purpose of evaluations to make them context-specific and learn from local, indigenous, and grassroots approaches developed by those seeking systemic change. Research, promote, and provide resources for the development of existing and new evaluation paradigms from the Global South.

¹²⁷ Cecilia Milesi: cecilia@ceciliamilesi.com and list of websites and contact details (see table above).

To foster more effective and meaningful evaluations in the Global South, it is imperative to bring about a paradigm shift in values and purpose. A key step towards this shift requires more work to bring forth non-western worldviews and values into evaluation theory and practice. There is a need to engage with the understanding of evaluation standards and principles that are narrowly defined based on ideas borrowed from non-social fields. This includes promoting the development and utilization of innovative, indigenous frameworks, tools, and methods which are grounded in the collaborative evaluation practices of local communities.

Moreover, the costs of working in politically unstable contexts must be factored into project budgets to ensure the sustainability of evaluations and learning processes. In addition, evaluation frameworks and methodologies that reconcile the tension between quantitative and qualitative approaches should be encouraged. To effect change within the evaluation industry, efforts that embrace and respect local values must be implemented, leading to the mainstreaming of these values within evaluation programs. In this regard, it is important that diverse evaluation approaches that portray different Global South realities find a place in several global publications so as to reach a wider range of readers and practitioners.

As newer local funders emerge and funding models are being developed in the Global South, alongside an increasing number of private sectors investing in ‘impact investing’, it is important to help these stakeholders plan evaluations that are grounded in context and are power-aware.

2. It is imperative that those affected by the program co-create and own the evaluation process as well as its findings. There should be room to challenge the Theory of Change of the program itself.

“Creation of a budget line for the participatory design of any program would be a great first step” (INGO staff & social movement member, LatAm)

To promote more effective and meaningful evaluations, it is imperative to co-create and co-design programs and evaluation frameworks with local evaluators and communities. Co-creation would mean starting from the outreach of the Request for Proposal and the right to use and disseminate the findings and, throughout this process, be open to the challenges posed by the partners or those most affected by the program. Additionally, the level and quality of community participation in the design and evaluation of programs should be included as part of the evaluation indicators. Appropriate participatory evaluation approaches can help ensure that the evaluation emerges from reflections from the people on the ground, guaranteeing ownership of the process and a bigger commitment to the need for change. It is also important to share the who, what, and why of the programs with the beneficiaries, together with how data is used, and to what end. This type of evaluation can be done both at all levels: local, national, and global or portfolio level as long as there is a political will from the organizations involved.

3. Provide flexible, longer-term, and robust funding directly to transformative organizations that allow for a co-creative evaluation process based on trust.

In order to facilitate a co-created and meaningful evaluation process that is able to learn of the impacts on various stakeholders affected by the program, there is a need for long-term and flexible funding through the evaluation process, including at the design stage. Furthermore, creating broader timeframes for interventions can enable the creation of relationships of trust. Adequate and flexible funding should also be provided to effectively carry out a more in-depth evaluation process that explores different methods of data collection and captures grassroots voices. Moreover, promoting broader and more extensive lines of financing can increase the access of a wider range of stakeholders to evaluation opportunities.

4. Strengthen the capacities of all the relevant actors involved in the evaluation process (including funders), making use of spaces that are close to local actors and approaches that boost their confidence and promote reflective practice.

There is a need to develop evaluative, reflective, and critical thinking capacities among development professionals in order to undertake evaluations. This should be grounded in contextual and power-aware knowledge. There is also a need to create systems to teach evaluations that address and identify the various methods and approaches used around the globe. The process should incorporate lessons about the generation of systems-based knowledge and include in-depth lessons about the understanding of power and colonial relationships between the North and the South. The final aim should be to understand extraction from North to South as well as to analyze the relational, social, geopolitical, and economic dynamics. Similarly, capacity-building efforts across various levels must address power inequity, always bearing in mind the powers at play and the relevant contexts, making sure these efforts do not replicate inequity at different levels.

5. Identify and strengthen networks that innovate, share knowledge and build relationships at all levels to shift the evaluation ecosystem towards more equity.

There is a need for more Global South-led spaces and networks that advocate for context-specific and power-aware evaluations. By promoting innovation, sharing of knowledge, existing initiatives and building relationships, networks can facilitate collaboration between stakeholders, enhance capacity-building, and create a shared vision for equity-focused evaluations.

6. There is a need to make donors accountable by promoting both South and North-led advocacy. Global South actors could be empowered to mobilize and scrutinize real donors' actions toward promoting local power.

Developing strong Global South-led networks can also provide a platform for Global South actors to jointly scrutinize donors' actions and advocate for local power. They can advocate for transparency and accountability in donor funding and decision-making processes. This can be done through the development of policy briefs, position papers, and joint statements that demand greater transparency and accountability in donor actions. Global South actors can also engage in advocacy efforts at the national and regional levels to promote local power. This can involve working with civil society organizations, community groups, and other stakeholders to raise awareness about the importance of promoting local

power in development. The localization agenda should and could be used to make donors accountable by promoting both South and North-led advocacy.

ANNEX 1: ONLINE SURVEY QUESTIONNAIRE

Landscape analysis to inform international evaluation in the service of equity

Thank you for completing this short 20' survey (21 questions) for the participatory action-research study "Landscape analysis to inform international evaluation in the service of equity" conducted by Global Change Center and Praxis Institute of Participatory Practices in collaboration with Global South partners, commissioned by the Ford Foundation. The purpose of this study is to further the understanding of the current situation regarding equity-oriented evaluation in international development and social justice work. Specifically, the South-led team seeks to analyze the power dynamics within the evaluation ecosystem, recognizing that these dynamics create both barriers and opportunities to equity-oriented evaluation. The research is conducted in Latin America, Africa, Asia, United States and Europe. Your responses will help us describe the status of the evaluation ecosystem today and to harvest data regarding how "equity-oriented evaluation" is being practiced by several donors and organizations, and who they are. All the data provided will remain confidential. We may use some aggregated findings in the final evaluation report, without attribution. In our work, we seek to engage a network of like-minded partners. To connect with us, or in case of any queries, please reach out to Kelsey Simmons, from the Ford Foundation at k.simmons@fordfoundation.org, Cecilia Milesi, from the Global Change Center at cecilia@ceciliamilesi.com, and Pradeep Narayanan, from Praxis at pradeepn@praxisindia.org. Many thanks in advance!

For more information, please visit: www.globalchange.center and www.praxisindia.org

Background Details

- Your Name
- Your organization
- Your country
- Email address

(This information will be kept confidential, it will only be made available to the research team and used to contact you in case of queries related to your answers.)

Would you say that you are someone from:

- Global North
- Global South
- Other

Would you say that your organization is from:

- Global North
- Global South
- Other

IF Other, please specify

Your prominent relationship with the evaluation ecosystem:

(Please select the option that most predominantly describes your relationship with the ecosystem, while we acknowledge you may play other roles as well.)

- I'm an evaluator
- I undertake commissioning of evaluations
- I'm part of programs that get evaluated
- I use evaluation findings for policy-making / strategy development, theory building / make investment decisions
- Academic
- Donor/ grantmaking organisation
- Other

IF Other, please specify

Would you say that you align with a particular ideology?

- Yes
- No
- Would not like to share

8a. Please write briefly which ideology best characterizes you (e.g., feminist, anti-racist, etc.)

Your perspectives and opinions on the international cooperation agenda

In your opinion, what countries/ regions and institutions control international cooperation for the development and human rights agenda?

- Global North: OECD countries, rich/developed countries and their institutions
- Global North subsidiaries: Northern universities, consultancy firms, northern INGOs, etc.
- Global South: Global South "umbrella" NGOs with a capacity to simulate and implement Global North standards
- Global South countries, NGOs and other independent and sovereign actors in control of decision-making
- Democratic, inclusive, feminist Global South countries exercising independent and sovereign decision making

- Other

IF Other, please specify

9a. Could you provide an example of an agency exercising outsized geopolitical power?

Picturing the Characteristics of the Evaluation Ecosystem

In terms of the social background of the evaluators of international cooperation initiatives, which of the following trends is prominent?

(With 1 signifying no change in the trend, and 6 signifying a strong push towards diversity/inclusion)
(Trends that you think in the last five years show a prominent shift. In other words, you perceive that things are demonstrably changing or have changed)

[Matrix question]

- From a male dominant leadership team to a gender diverse leadership team
- From a largely white team to a non- white team
- From a team educated only in [Europe- UK-USA Univ] to a team educated in the Global South
- From a team with a dominant caste to a team with a predominantly non-dominant caste
- From based in metropolitan cities to working in diverse regions/ rural areas
- Towards recognition for able-bodied / different capabilities
- Towards inclusion with respect to Heterosexual / LGBTQ+
- From Global North leadership to Global South leadership
- From strong-academic-background- based prominence to prominence of lived experiences and activist experiences
- From native English speakers as evaluators to evaluators speaking other languages If there are any other trends, please specify

Please give some examples of the key trends you have indicated above.

Which of the scenarios below are prominent, beginning to change and least prominent, in terms of Control of Evaluation Partnerships and how they are operationalized?

12a. Global North funding Global North evaluators

- Prominent change visible Actively changing
- Beginning to change Less prominent change

12b. Global North funding Global North evaluators but engaging Global South entities / consultants

- Prominent change visible Actively changing
- Beginning to change Less prominent change

12c. Global North funding Global South as implementers

- Prominent change visible Actively changing
- Beginning to change Less prominent change

12d. Global North funding Global South communities and local organizations to set THE evaluation agenda, processES and standards and implement the evaluation

- Prominent change visible Actively changing
- Beginning to change Less prominent change

Evaluation Approach and Process

What are the guiding and/or most prominent principles of evaluation?

(Please select the one that has been the most prominent over the last 5 years)

- Objectivity, impartiality, efficiency, value for money, and effective delivery/ achievement of outputs, upward accountability, verification
- Impact and outcome change, transparency, mutual accountability
- Transformation, social change, inclusivity, community/ marginalized/ GS leadership, empowerment and ownership, increased solidarity and dignity, accountability to local actors and (ultimately) to donors, dialogue

Evaluation partnerships that are more predominant:

- Evaluation partnerships with pre-established evaluation principles, methods and priorities set at the top
- Evaluation partnerships with some principles, methods and priorities set at the top; those closer to the topics/issues/realities being evaluated have limited say in the evaluation process
- Horizontal and dialogical partnerships, in which the co-establishment and co-production of principles, methods and priorities is the way of working

- South/ community-led partnerships, with all the evaluation principles, methods and priorities being established by those impacted by any international cooperation initiative; donors at the top funding community-evaluation
- Processes
- Other

The ownership and production of the data collected is largely:

- Data is co-produced and owned by citizens
- Data is semi-controlled in the process of feedback looping
- Citizens don't have any control over the data
- Other

If other, please specify

What is the predominant evaluation approach?

- Objective, impartial, quantifiable "SMART" [Specific, Measurable, Achievable, Relevant and Time-bound]
- Interpretative, buffering evaluation (a technical team does the work on behalf of the "grassroots"), interpreted and mediated by external actors
- Co-creation, local ownership of process, "SPICED" [Subjective, Participatory, Interpretative, Cross-checked, Empowering, Diverse and Disaggregated]

In most cases, do evaluation objectives often provide a space for:

(You can select multiple options)

- Challenging efficiency and effectiveness of the program
- Challenging the theory of change, the program ideology
- Challenging the worldview behind the theory of change
- Other

If other, please specify

In most cases, how are findings used and disseminated after the evaluation?

- Joint analysis between evaluator and program beneficiaries and target population, oriented to advocacy, the promotion of continuous change processes and influence (action-research); information published publicly and used to transform donors' policies and practices
- Evaluation findings are used to some extent for program enhancement; findings are shared only depending on analysis regarding reputational risks / conclusions vis-à-vis maintenance of the status quo

- Evaluation findings are not shared in the public domain; information is only used to ensure renewal of funding cycle; evaluation as a check-list exercise to maintain status quo

IF Other, please specify

In your own words, what is "equity-oriented evaluation"?

Can you share one short example of an evaluation that was "equity-oriented"? (Please, provide as many details as possible, for example, name of the organization leading it, principles and methodologies used, role of citizens, etc.)

Do you have any proposal/ideas on what is necessary in order to promote equity-oriented evaluation?

Thank you for your time!

ANNEX 2: REQUEST FOR PROPOSAL (BY FORD FOUNDATION)

Request for Proposals: Landscape analysis to inform international evaluation in the service of equity

The Ford Foundation's Office of Strategy and Learning is seeking proposals for a landscape analysis related to international evaluation in the service of equity.

Background

Evaluation plays a powerful role in international development and human rights work. Bilateral and multilateral agencies as well as private funders have used evaluations to make judgments about the effectiveness of programs and grantees, deeming them worthy of continued or increased funding, or not. To this end, evaluations have historically borrowed heavily from the values and methods of natural and clinical scientific research, thereby privileging notions like objective truth and replicability (and elevating certain methods, like experimental designs and randomized control trials), while diminishing the role of power and context. And finally, as these values and methods have been largely generated in the Global North, the field of evaluators, not coincidentally, has been dominated by highly educated, White, largely elite individuals who - intentionally or not - bring their own cultural perspectives and biases to their work. While evaluation has been portrayed as technical, value-neutral, and especially objective, it - like all disciplines - is steeped in norms, implicit bias, and judgments. All of the above has, in many cases, meant that evaluations have contributed to a lack of impact (at best) and a further entrenchment of deeply rooted inequality (at worst) by the very interventions meant to address these ills.

That said, efforts to address these inequalities in evaluations of international development and especially human rights work have been underway for some time. As a result, there is a growing cadre of Global South evaluators as well as institutions teaching evaluation from the Global South. There is also discernible uptake, especially among human rights funders, of equity-oriented, context-appropriate, participatory, and user-focused methods and frames of evaluation, including but not limited to culturally responsive, feminist, Indigenous, complexity, and utilization-focused methods, all of which prioritize context, nuance, and an understanding of the role of power in creating/hindering change over the valuing of universal truths and generalizability as a gold standard. Evaluators are advocating for Global South-rooted frameworks such as the [Made in Africa Evaluation](#) to elevate the influence of African-centered values and methods that can underpin evaluation methodology and practice. [Evalindigenous](#), a network of Indigenous evaluators that is organized as a subset of [EvalPartners](#), promotes valuing the strengths of Indigenous evaluation practices. These are just a few examples of the work happening across the international landscape of evaluators who are researching evaluation in the service of equity and increasingly discussing how to [decolonize evaluation](#).

And yet, these kinds of equity-oriented methods and practices are often still the exception and continue to be concentrated most among funders focused on human rights and social justice work. While more evaluators are recognizing the importance of context, perspective, and interpretation, randomized control trials and other such methods continue to be seen as the "gold standard" in many circles. There continues

to be disproportionate emphasis on describing the “what” of the intervention (i.e., an outsized focus on activities, outputs, and metrics, undergirded by a general assumption that change is linear), and not enough on “why” results did or did not occur, “who” is part of the design and interpretation of findings, and, importantly, what were unintended or unanticipated effects (all of which alludes to change as non-linear and complex). Moreover, funders are generally too quick to replicate and scale projects based on limited and short-term evidence of success, without a deeper analysis of in what contexts, under what conditions, and based on whose viewpoint an intervention was perceived to have worked. They commonly overlook analysis through a social justice lens (e.g., attention to power, history, structure, and identity) and the corresponding examination of the role of context and power in understanding how change happens, before even considering *whether* to replicate and scale, let alone *how*.

Finally, despite progress, the field of evaluation continues to be dominated by White, Global North evaluators who don’t represent the contexts and populations they are evaluating. Global South evaluators rarely lead evaluations in their own contexts - far too often they hold lesser positions relative to their Global North counterparts on evaluation teams. Even among evaluators from the Global South, evaluation continues to be an elite profession where expertise is predominantly assigned to those with advanced degrees (and those trained in methods that continue to posit Northern values of objectivity and truth without examining fundamental questions related to power, largely because Global North commissioners of evaluation continue to demand them).

What Ford Seeks to Support

There is much to be done to bolster the number (and power) of evaluators who are: 1) from other, less represented categories of class, geography, religion, race, disability, gender, educational backgrounds, and the various intersections therein, and who are 2) doing equity-oriented evaluation.

Ford’s Office of Strategy and Learning (OSL) seeks to leverage the current window of opportunity related to global conversations about evaluation and equity and invest limited resources to bring together those who are already committed to evaluation and equity to find ways to more effectively engage non-like-minded funders and agencies.

In particular, we want to better understand the ecosystem (both supply and demand) of international evaluation. We want to interrogate questions like the following: on the supply side, what are the key institutions focused on teaching Global South evaluators and what is the focus of their curricula? What are the hubs and networks for Global South evaluators? On the demand side, who is commissioning evaluations and from which sectors, with equity (both the who and the what) at the center?

In the coming years, we want to see demand-side change, with funders of international development and human rights work, including bilateral and multilateral agencies as well as private funders, employing equity-oriented methods for a larger portion of their evaluations, as well as increasing the percentage of equity-oriented evaluations led by diverse Global South evaluators. On the supply side, we want to see an increased pool of diverse evaluators working within a field that is continuing to build evidence and strengthen the case for equity-oriented methods.

Purpose of landscape analysis

Ford's Office of Strategy and Learning is seeking a research partner(s) to conduct a landscape analysis to advance understanding of the current state of affairs relative to equity-oriented evaluation in international development and human rights work. We are open-minded with regards to what this might entail, and have listed our initial ideas below:

1. Current state (map) of *supply* relative to programs and initiatives graduating diverse Global South evaluators and their curricula;
2. Current state of *demand* for equity-oriented evaluation by commissioners of evaluation in international development and human rights work;
3. Gaps and opportunities to increase the *supply* of diverse evaluators working on equity-oriented international development evaluations; and
4. Gaps and opportunities to increase the *demand* among international development funders that commission equity-oriented evaluations by diverse evaluators.

We've listed a few illustrative (and big categories of) scoping questions below. Here again, we will finalize questions in partnership with the research partner.

Level	Example scoping questions
Supply	<ul style="list-style-type: none"> • What are the key programs/fellowships/initiatives focused on equity-oriented evaluation and/or growing the field of diverse evaluators in international development and human rights? What are their points of emphasis? • What has been tried? What has/hasn't worked and why? • What hasn't been tried? • Where are there opportunities to expand on existing work?
Demand	<ul style="list-style-type: none"> • Who are the key actors (bilateral and multilateral agencies as well as private philanthropy) currently employing equity-oriented evaluations in international development and human rights? • Are there particular fields or geographic regions where there is traction in using equity-oriented evaluation methodologies and processes (e.g., education, health, women's rights, climate change, African continent, Latin and South America, South Asia, Indigenous lands, etc.)? • What does it take to motivate funders (who don't use an equity frame) to commission equity-oriented evaluations by diverse evaluators? What are the main obstacles? • What are the decision-making processes and systems across funders that would need to be revised to institutionalize equity-oriented evaluations?

Lessons to inform strategy	<ul style="list-style-type: none"> • What strategic choices should Ford consider in advancing this work?
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Intended Users

Ford's Office of Strategy and Learning (OSL) will use the evidence and findings from this study to inform **limited grantmaking** and other activities in support of equity-focused evaluation internationally. We are also committed to ensuring information and learning resulting from this analysis is made available to the international development, social justice, and evaluation sectors more broadly.

Deliverables

The specific timeline and deliverables will be mutually developed in dialogue with the Ford Foundation. We recognize the scope of the RFP is broad - we are seeking thought partnership and welcome feedback on the process as well as ways to narrow the scope. At a high level, we envision the following phases/activities, with anticipated completion by June 2022:

- Discovery phase with research partner and Ford, resulting in finalized scoping questions, methodology, and implementation plan;
- Data collection and analysis;
- Draft findings;
- Final report (internal and external versions);
- Reflection sessions internally with Ford staff, as well external dissemination.

Partner Profile

While no partner profile and proposal will meet all criteria below, the following qualifications are key areas of consideration in the review and selection of the incumbent. We welcome partnerships or collaborations.

- Commitment to and demonstration of diversity, equity, and inclusion on learning and evaluation team, with particular focus on representation from the Global South
- Significant experience with and knowledge of the field of international development and human rights evaluation, including the history of evaluation
- Interest in thought partnership that includes raising questions, pushing existing thinking, and an iterative design process
- Experience with program monitoring, learning, and evaluation design and implementation, with a focus on equitable evaluation approaches
- Strong qualitative and quantitative research and analytical skills
- Strong communications and storytelling skills, particularly focused on data visualization and communicating complex social change issues across a wide variety of audiences

- Willingness to be iterative and adaptable to scope, pace, and benchmarks in response to the unexpected

Submission details

In line with our focus on equity and evaluation, we aim to reduce the burden on interested applicants. Therefore, we ask applicants to provide a brief proposal of no more than 5-7 pages (approximately 3000 words) by **November 5, 2021**.

The proposal should be seen as a starting point for a longer conversation with our team. Following the submission of proposals, we will invite a smaller pool of applicants to discuss their interest in a brief phone call with the team.

The proposal should outline the following:

- A brief statement describing why you are interested in and well-placed to support this work;
- A brief explanation of your principles and approach to research and evaluation;
- A brief explanation of your principles, policies, and/or practices related to diversity, equity, and inclusion;
- Reflections on how you would design and implement this landscape analysis including suggestions/ideas for how to narrow the proposal. For example, we are open to focusing on particular fields within international development and human rights (e.g., by issues such as education or health, or by geography), or by research method (e.g., case study approach);
- A brief work plan of the steps you propose, which we recognize are subject to change; and
- An estimated budget (fees and expenses) and desired payment schedule. Please note we estimate up to USD \$175,000 for this work.

Please state any assumptions you are making in your proposal. We ask that all interested applicants submit proposals to Subarna Mathes at s.mathes@fordfoundation.org and Kelsey Simmons at k.simmons@fordfoundation.org.