CONVERSATION STARTER

The Bridgespan Group
*Collaborating to accelerate social impact*

# How to Measure with Equity

Performance measurement isn't solely a yardstick for success. It's also a tool for learning and decision making that helps you improve—and equitable measurement is vital to getting full value out of the process.

Measuring with equity means incorporating a range of voices and viewpoints, including those with the least traditional power, and putting the challenges and solutions from your community and constituents at the core of how you think about impact. Communities and constituents know what they need better than anyone. As a result, they should be engaged as partners in the measurement process rather than as "beneficiaries."

This conversation starter is a guide to help your team embed practices that promote equitable forms of measurement, evaluation, and learning into your improvement efforts.

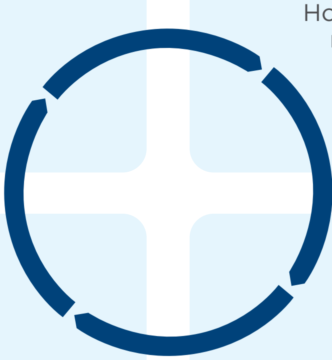
## What Equitable Measurement Can Look Like

### Design around engaging with constituents and communities

- Who is critical to involve in your measurement process?
- How will you thoughtfully engage them?
- Who will engage them?

### Define what outcomes matter most
### Measure by collecting quantitative and qualitative data

- What outcomes are most important to your constituents?
- How will you collect data? From whom? How will this process be inclusive and minimize time burdens for constituents?
- How will you disaggregate your data?



### Share insights
### Keep engaging

- How are you sharing information with those you engaged?
- What are you doing to continue engaging beyond any one measurement cycle?

### Learn and improve based on the data you collect

- How are resources allocated for, and who contributes to developing and acting on, lessons learned?
- How can you combine quantitative and qualitative data to identify areas for improvement?
- How will communities and constituents be included in unpacking the data?

**Source:** The Bridgespan Group

# Design Around Engaging with Constituents and Communities

1. **Which constituents and communities are critical to involve in your measurement process?**

*Consider:*

- Focus on who will ultimately be impacted by the results of your measurement, even if they're not specifically served by your organization.
- If you have an existing client or community advisory group, this is a great place to start seeking feedback and input.

2. **How will you thoughtfully engage them?**

*Consider:*

- The most common engagement methods are focus groups, one-on-one conversations, and community meetings.
- Engage people not only to collect data, but also to get feedback on preliminary insights or ideas for improvement. (You might ask, e.g., "We're looking at making these changes—what do you think are some potential solutions?")
- Balance the need for information with respect for individuals' time.
- Community members are often compensated for their participation.

## 3. Who inside or outside your organization will lead in these conversations and measurement activities?

*Consider:*

- Assess whether the performance measurement team has all the right skills and relationships to engage communities and measure with equity.
- If it's necessary to engage outside evaluation expertise, remember that knowledge of the communities and issues involved is also an important type of expertise.
- Front-line staff often have deep knowledge of the issues and communities of interest and could be trained and engaged to support performance measurement.
- Constituents, if trained and compensated to do so, can also help administer surveys, run focus groups, facilitate community meetings, and analyze data.

## Define What Outcomes Matters Most, Measure by Collecting Quantitative and Qualitative Data

1. **What outcomes are most important to your communities and constituents? How do you know?**

*Consider:*

- Clarify your organization's definition of equity and how it relates to the work you do.
- Define learning questions—the answers to which could be important in identifying inequitable outcomes and improving organizational performance.
- Consider structural inequities and root causes, allowing for a broader understanding of the problem that could lead to practical solutions.

2. **How will you collect data, and from whom? In what specific ways will this process be inclusive? What is the time burden of data collection for constituents?**

*Consider:*

- Examine your current data collection to determine whether it's all necessary. (You might ask, e.g., "Will the organization use the data, or is the data required by funders?")
- It may be possible to collect information less frequently, or in simpler form, or with less burden on the people you're collecting it from.
- Take steps to ensure your data-collection practices are culturally competent.
- If you're experimenting with collecting additional types of data, consider doing it initially on a one-time basis—and then keep collecting it only if it's valuable and worth the cost.

## 3. What are the dimensions along which you will disaggregate your data?

*Consider:*

- Broad categories may obscure important inequities within groups or communities that, without further information, will remain anecdotal or invisible.
- With limited resources, the most effective disaggregation is often driven by specific hypotheses or hunches. Identify the most important thing you want to learn. Does it seem like there may be an important group or community you're failing to reach, or one constituency getting more or less benefit from your program than others (even if your existing data isn't revealing it)?

## Learn and Improve Based on the Data You Collect

1. **How are resources allocated based on what has been learned, and who contributes to developing and acting on lessons learned?**

*Consider:*

- Seek out the voices of community members and constituents. See them as assets who have the lived experience to help inform or design their own solutions and set a plan for action.
- Think about how your annual budget and planning cycle ties into your measurement cycle so you have the data and insights to inform decisions.

2. **How can you combine quantitative and qualitative data to understand areas for improvement?**

*Consider:*

- Evaluate the types of quantitative data needed to answer your learning questions, and how additional qualitative data may help complete the answers.
- Qualitative data can be especially useful in understanding how a particular behavior or action is understood, or how people make sense of their circumstances.
- Combining qualitative and quantitative data can allow for a better understanding of what's happening and how to improve operations and outcomes.

### 3. How will communities and constituents be included in understanding and unpacking the data?

*Consider:*

- To shape and deliver effective interventions, use data originating from client engagement to drive changes.
- Engage staff, client or community advisory groups, community partners, and other community voices to assess what's been learned.

## Share Insights, Keep Engaging

1. **How are you sharing information with those you engaged?**

*Consider:*

- There may be a variety of ways to share insights and lessons learned: for example, existing groups and forums or a section of your website, newsletter, or other ongoing client or community communications.
- For larger evaluation projects, it can be especially important to find ways to share with sites, partners, and communities so they can understand what was learned and act on it themselves.

2. **What are you doing to continue engaging on measurement and learning beyond any one measurement cycle?**

*Consider:*

- Measuring with equity takes time and requires iteration. Organizations should continuously seek and respond to feedback in their decision-making processes, especially from those with less traditional forms of power.