

Equity in Evaluations

Moving the Needle

*A Tool to assess Equity in Evaluation principles,
policies and practice*



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Name of Tool

Moving the Needle: Equity in Evaluations – A Tool to Assess Equity in Evaluation Principles, Policies and Practice.

Purpose

To provide guidance on how to integrate equity and balance power relationships into evaluations.

Audience

The primary audience is donors, evaluation managers and commissioners involved in international development. The secondary audience includes evaluators, evaluation networks and global thought leaders. Users may include a broad range of stakeholders at community, country, regional and global level.

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Executive Summary

Moving the Needle: Equity in Evaluations – A Tool for Donors and Commissioners

Why this tool?

Evaluation has always strengthened accountability and learning. But today's intersecting crises—inequality, climate change, declining trust in institutions, and social fragmentation—demand more. Evaluation must move beyond measuring outcomes and impact to question assumptions, elevate local voices, shift power, and center equity in how knowledge is produced and used.

What is it?

Moving the Needle is a reflective assessment tool designed primarily for donors and commissioners. It was developed by the Gender & Equity Network South Asia (GENSA), Praxis (Institute for Participatory Practices), and the Global Change Center, with support from Canada's International Development Research Centre (IDRC). The tool builds on the Ford Foundation's Landscape Study on Equity-Oriented Evaluation and draws on grounded experiences from Global South.

What does it do?

The tool invites donors and commissioners to reflect on:

- Who holds power in evaluation processes?
- Who defines value and what counts as “rigor”
- How decisions can reinforce or challenge inequities
- Where can equity be embedded at every stage of the evaluation cycle?

The tool has been designed to be adaptable across contexts where power asymmetries exist between funders, commissioners, evaluators, intermediaries and communities.

How is it structured?

- **Readiness:** Guidance to assess the preparedness of an organization to embed equity and shift power
- **Levels:** Four levels of change – Macro, Meso, Micro and Internalized Norms
- **Dimensions:** Each level includes three to four dimensions to assess equity
- **Sub-Dimensions:** Each dimension is further broken down into sub-dimensions to provide nuance and depth in assessing equity. Dimensions and sub-dimensions are scored on a four-point scale: Basic, Foundation, Promising and Vibrant.

How many modules?

1. **Module: Readiness** – Prepares users to engage with the tool.
2. **Module: Lite Approach** – A quick appraisal of equity at the macro, meso, and micro levels (up to the dimensions).
3. **Module: Deep Dive Approach** – A detailed appraisal of equity at the macro, meso, and micro levels (covering both dimensions and sub-dimensions).
4. **Module: Internalised Norms** – Explores underlying values, assumptions, and epistemologies that shape evaluation practice.
5. **Module: Next Steps**

How is it different?

This is not a compliance checklist. It is a thinking tool—a space to ask hard questions, surface hidden assumptions, and encourage honest institutional reflection. Using an appreciative inquiry approach, it builds on strengths while addressing the unique challenges of each institutional ecosystem.

Why does it matter?

By reimagining roles and relationships, Moving the Needle supports the creation of a more inclusive, just, and transformative evaluation ecosystem. Shifting power is not easy, but it is both possible and necessary.

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1. Introduction

Evaluation is at a crossroads. More than ever, it is being asked to do more than track results or ensure accountability. In a world facing rising inequality, declining trust in institutions, and climate crisis, evaluation can help us ask better questions, surface overlooked voices, and guide more just and inclusive decisions. To fulfill this potential, however, we must examine how evaluation is practiced and who shapes it. Collaboration across regions and sectors is essential, but it must also be reflective and honest. Whose priorities define what matters? Whose knowledge is deemed valid? And are we reinforcing the very power structures we hope to challenge.

Evaluation is often steered by the policies and priorities of donors and commissioners¹ from the Global North². Here, “Global North” and “Global South” are not strictly geographic but geopolitical constructs shaped by colonial histories, economic dominance, and control of knowledge production. Institutions, ideologies, and systems of power linked to the North also operate within the South. This dominance, regardless of location, demands scrutiny. Funding choices—what is supported, whose knowledge counts, which methods are legitimized, and how evidence is interpreted—can either expand space for equity or reinforce entrenched hierarchies.

The global evaluation field has largely been shaped by theories, standards, and protocols developed in the Global North, often adopted in the South without adequate space for adaptation. These frameworks define credible evidence, shape evaluation terms of reference, dictate methodological preferences, and determine who conducts evaluations and how.

As a result, evaluation has too often served as a project-level accountability mechanism rather than a tool for social justice. Communities most affected by poverty, conflict, gender-based violence, and exclusion are rarely centered as knowledge holders or as audiences for findings. Root causes remain unexamined, and evaluations risk reproducing existing power hierarchies.

Over the past decade, the evaluation community has begun to rethink this role. The Global Evaluation Agenda 2020 (GEA 2020)³ emphasized evaluation as both accountability and a driver of societal transformation. While evaluation as a formal discipline took root later in the Global South, many regions have long histories of Indigenous, community-based, and participatory knowledge generation and accountability. Recent years have also seen growing interest in evaluation networks, voluntary organizations, and research on decolonizing practices and contextualizing methods.⁴

Yet, while evaluators have worked to transform their roles, much less attention has been paid to the power and responsibilities of donors and commissioners. The commissioning side—how evaluations are initiated, designed, and governed—remains underexplored. This tool was developed to help donors and commissioners reflect on those dynamics. It is not a checklist, but an invitation to pause, ask critical questions, and consider how equity appears (or fails

¹ Donors and commissioners of evaluation refer to a wide range of agencies - bilaterals, multilaterals, philanthropy, international NGOs, foundations, and others. Donors provide financial support for development programs and often for the evaluations of those programs. Commissioners design, initiate, and manage evaluations. They may be inside donor agencies, implementing organizations, or independent contracting firms. In this document, donors and commissioners are used interchangeably.

² Global North countries in North America, Western Europe, Australia, Japan, and New Zealand historically benefited from colonialism, and today they continue to influence global systems of trade, governance, aid, and knowledge production. They are typically high income, economically and politically dominant countries. Global South tends to be low- and middle-income countries in Asia, Africa, Latin America and some of the Middle East that have historically had a global power structure, often as a result of colonization and extraction. Both include a wide range of economies, cultures, and political systems and Global North and South terms point to shared structural advantages or disadvantages.

³ <https://nec.undp.org/sites/default/files/2021-07/Global%20Evaluation%20Agenda.pdf>

⁴ African Evaluation Association (Afrea) developed five African Evaluation Principles aiming to address power asymmetries and promote equitable evaluation practices. Latin American and Caribbean Evaluation Network (ReLAC) developed evaluation standards that prioritize human rights, inclusion, and contextual relevance, and have emphasized the need for epistemological pluralism. Gender and Equity Network South Asia (GENSA) GENSA has critiqued the dominance of Global North gender frameworks and transformation logics that do not reflect intersectional realities in South Asia (e.g., caste, religion, regional histories) and promoted the use of local wisdom.

to appear) in evaluation processes. The aim is to use donor and commissioner power to support evaluations that are rigorous, fair, inclusive, and transformative.

In sum, this tool supports donors and commissioners, particularly from the Global North, to embed equity across the evaluation lifecycle, from programming decisions and evaluator selection to partnership modalities, methods, analysis, and dissemination. Using an appreciative inquiry lens, it surfaces institutional strengths while also highlighting barriers to fairness, inclusivity, and justice.

Developed through research by Global South evaluators and thought leaders engaged in decolonizing evaluation⁵, the tool emphasizes that equity must be embedded not only in how evaluations are conducted, but also in how they are commissioned and governed. As the global evaluation ecosystem evolves, this resource supports intentional learning and helps align donor practices with commitments to equity, inclusion, and social transformation.

⁵ GENSA, Praxis, Global Change Center and other Global South partners participated in a landscape study commissioned by Ford Foundation to learn how equity is centred in evaluation. Please see the report <https://www.fordfoundation.org/work/learning/program-evaluations/an-analysis-on-equity-centered-evaluation-in-international-cooperation/>

2. Why an Equity-Assessment Tool for donors and commissioners?

The tool bridges the gap between **intention and action** by helping donors unpack how internal and external factors such as political shifts, epistemic dominance (dominance of certain ways of knowing), and procedural norms influence evaluation design and outcomes. It responds to the need for more participatory, flexible, and context-aware evaluation practices that elevate the perspectives and leadership of Global South communities.

The tool was developed in response to persistent inequities in evaluation practice, often rooted in internalized norms, traditional hierarchies, and geopolitical power imbalances. While many donors endorse equity and partnership⁶, unconscious biases and systemic structures often constrain transformative change.

This tool acknowledges those realities and supports commissioners to navigate them intentionally.

Common Constraints

Structural

- Compliance requirements prioritize documentation and accountability to funders over responsiveness to communities.
- Incentive systems reward outputs, efficiency, and control, discouraging participatory or iterative approaches.
- Rigid selection and procurement systems (e.g., standardized rosters, scoring criteria) favour Global North firms, sidelining newer or local actors.

Epistemic norms and biases

- Dominant Global North epistemologies privilege “technical objectivity,” discounting culturally rooted and Indigenous knowledge.
- Participatory, feminist, and community-driven methods are often miscast as “messy” or less rigorous.
- Core concepts—equity, participation, accountability, learning, partnership—are framed through Global North lenses, often conflicting with local realities.

Organizational capacity and learning

- Internal teams may lack time, staff, or skills to design and manage equity-oriented evaluations, increasing dependence on external consultants
- Siloed or underdeveloped learning systems prevent community-centered findings from influencing future programming.

Geopolitical and political dynamics

- Policy or leadership shifts in donor-country policy can abruptly reset funding priorities, elevating efficiency and certainty—especially when budgets contract.
- Pressure for quick results in politically sensitive contexts limits scope for long-term, equity-centered, transformative evaluations

The tool creates a reflective space for commissioners to surface these tensions, examine underlying assumptions, and navigate them with humility. Even without control over wider systems, commissioners can make equity-centered shifts—by refining evaluation questions, engaging diverse evaluators, building inclusive partnerships, and valuing multiple forms of knowledge.

⁶ Southern Voice report that Global North institutions express equity in the language of relationships and partnerships whereas Global South actors equate equity with broader, transformative, change processes in own societies. (pg 4, <https://southernvoice.org/envisioning-an-equitable-future-for-research-across-the-north-south-divide/>)

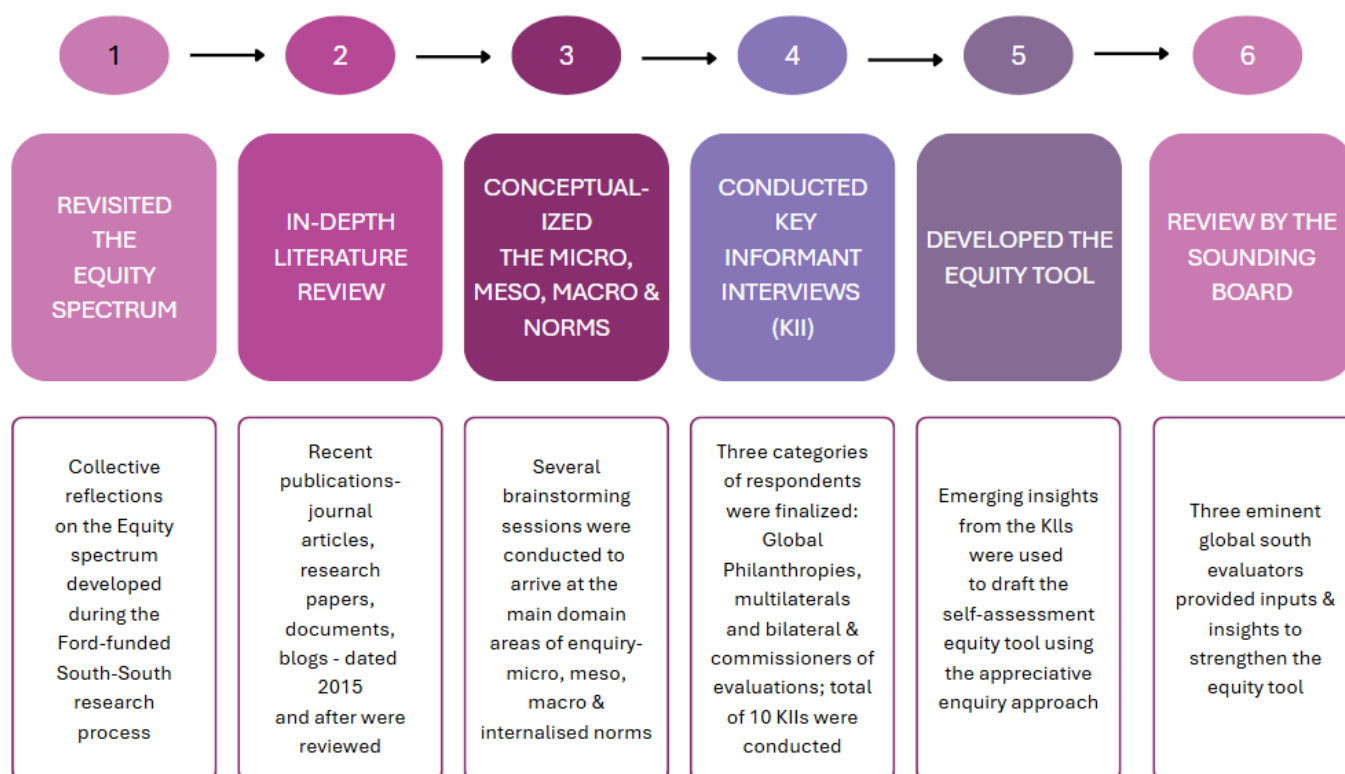
Our collective Theory of Change is as follows:

If donors use the self-assessment tool as they embark in evaluation processes, they will be better equipped to make decisions to embed equity and power-aware lenses in the entire evaluation process -from decision to fund an evaluation to its design then to dissemination and use.

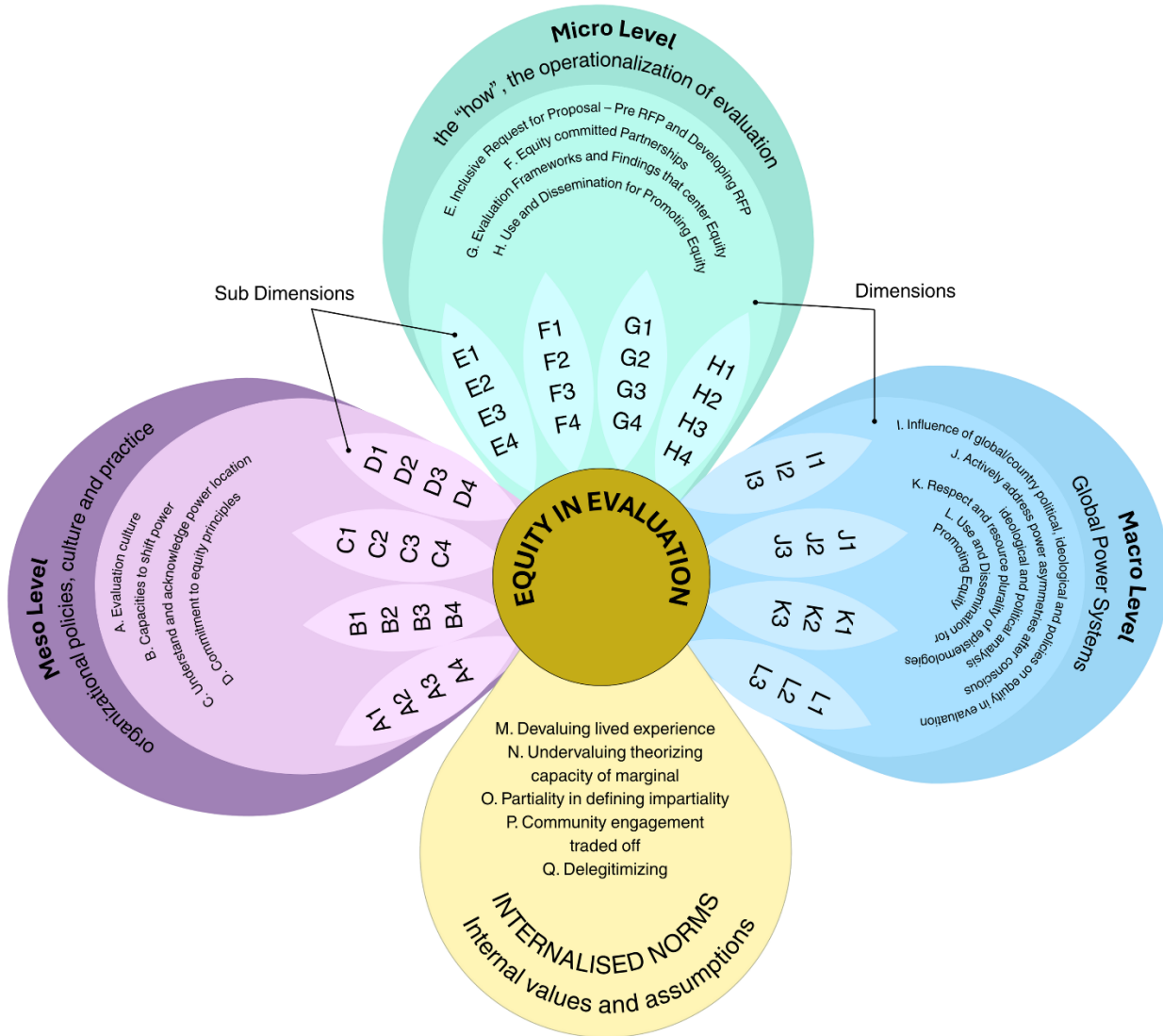
Donors with equity-informed decisions will facilitate the expansion of transformative evaluation policies and practices, thus, enabling the creation of contexts where evaluations are designed and implemented with more dignity, justice and inclusion.

The process steps for development of the tool were as follows:

Process Steps



3. Equity Assessment Framework



SUB DIMENSIONS		
MESO LEVEL	MICRO LEVEL	MACRO LEVEL
A1. Commitment of leadership towards evaluation with dedicated strategy and team A2. Resource Commitment for evaluations A3. Use of evaluation findings for improving projects and influencing global standards and principles A4. Reflection periodically on own evaluation strategy B1. Equity reflects in commitment of leadership towards evaluation B2. Equity reflects in resource commitment B3. Use evaluations to advance equity B4. Equity based reflection on evaluation practices C1. Power differentials exist and impact quality of evaluation C2. Understand location and privileges in ecosystem C3. Organized studies and research to identify interfaces and corrective actions D1. Universal terms D2. Level-playing field elements D3. Emerging paradigms from mainstream D4. Equity terms with ideological base	E1. Pre RFP: Co-creation E2. Pre RFP: Role and purpose of evaluation E3. Developing the RFP: Reference to E4. equity related concepts E5. Developing the RFP: Promotion F1. Selection of Evaluators – inclusive outreach F2. Selection of Evaluators – review process F3. Partnerships – horizontal and dialogical G2. Evaluation design: Purpose beyond measurement G2. Evaluation design: early and meaningful role for local actors G3. Data collection and analysis: inclusive and ethical data collection G4. Data collection and analysis: Participatory analysis and transformative focus H1. Inclusive accessibility and dissemination H2. Transformative use across levels H3. Community follow-up and feedback loops H4. Shared authorship and recognition	I1. Structured context analysis I2. Strategic use of influence I3. Context-specific actions J1. Policy engagement strategy J2. Influencing and monitoring change J3. Context-specific power asymmetries K1. Integrating diverse knowledge systems K2. Reflecting on epistemic openness K3. Context-specific epistemic practices L1. Respecting local evaluation practices L2. Navigating civic space with equity L3. Context-specific political savviness

4. Tool Structure

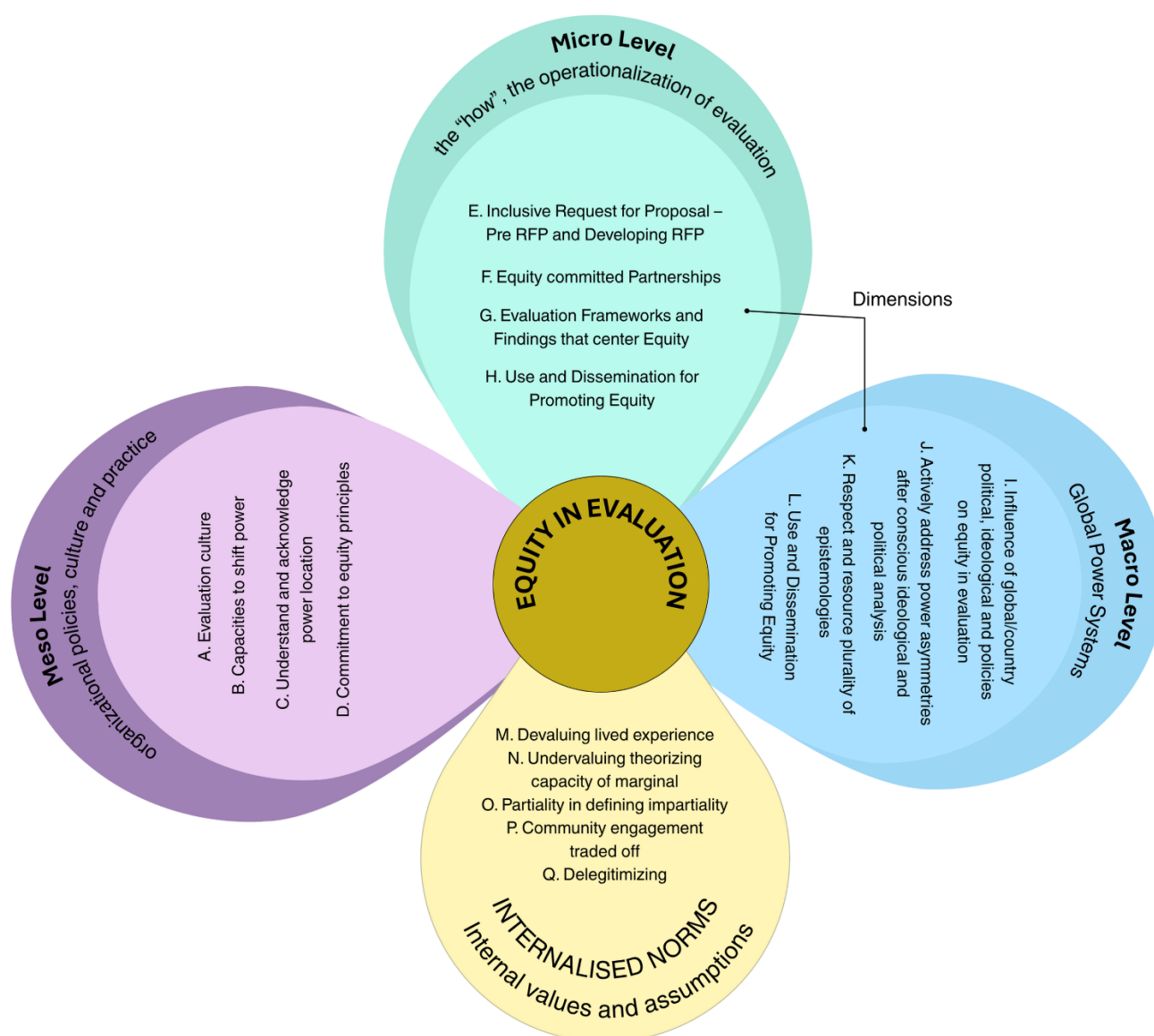
4.1 Readiness Mapping

The **Readiness Mapping** Module supports teams in reflecting on their current position, level of preparedness, and motivation for engaging with the tool. Anyone using the tool should begin here.

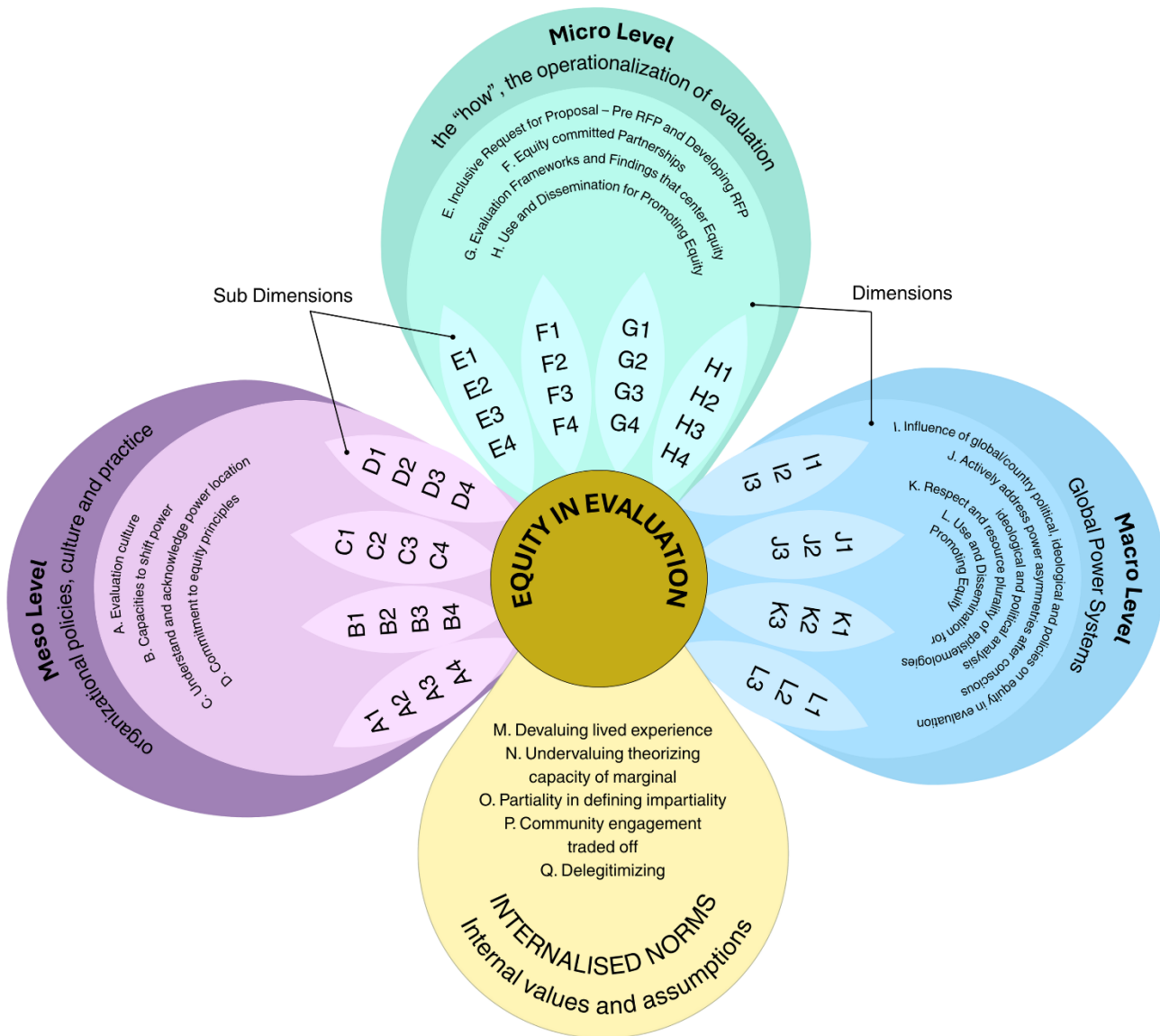
4.2 Lite and Deep Dives Modules

The Lite and Deep Dive layered structure enables both a high-level overview and a more granular understanding of how justice, exclusion, or transformation play out across different levels. The framework is offered in two versions:

- **Lite Version** – focuses on levels and their core dimensions, offering a concise tool for rapid assessment or introductory engagement. It is a quick and concise version that touches on all dimensions of the tool, but does not go deeper to the sub-dimension level. It is best suited for organisations short on time or for those who are engaging with these ideas for the first time. This version focuses only on the **dimension** level.



- Deep Dive Version** – includes levels, dimensions, and sub-dimensions, supporting more detailed analysis, reflection, and strategy-building. As it is comprehensive and detailed, it is best suited for those organizations who can invest time or who have already had extensive conversations or experience around equity in evaluation, or for those looking to link the tool to a broader strategic planning process or to prepare for an equity-centred evaluation commissioning. Because this version goes deeper to the **sub-dimension**, a facilitated process works best.



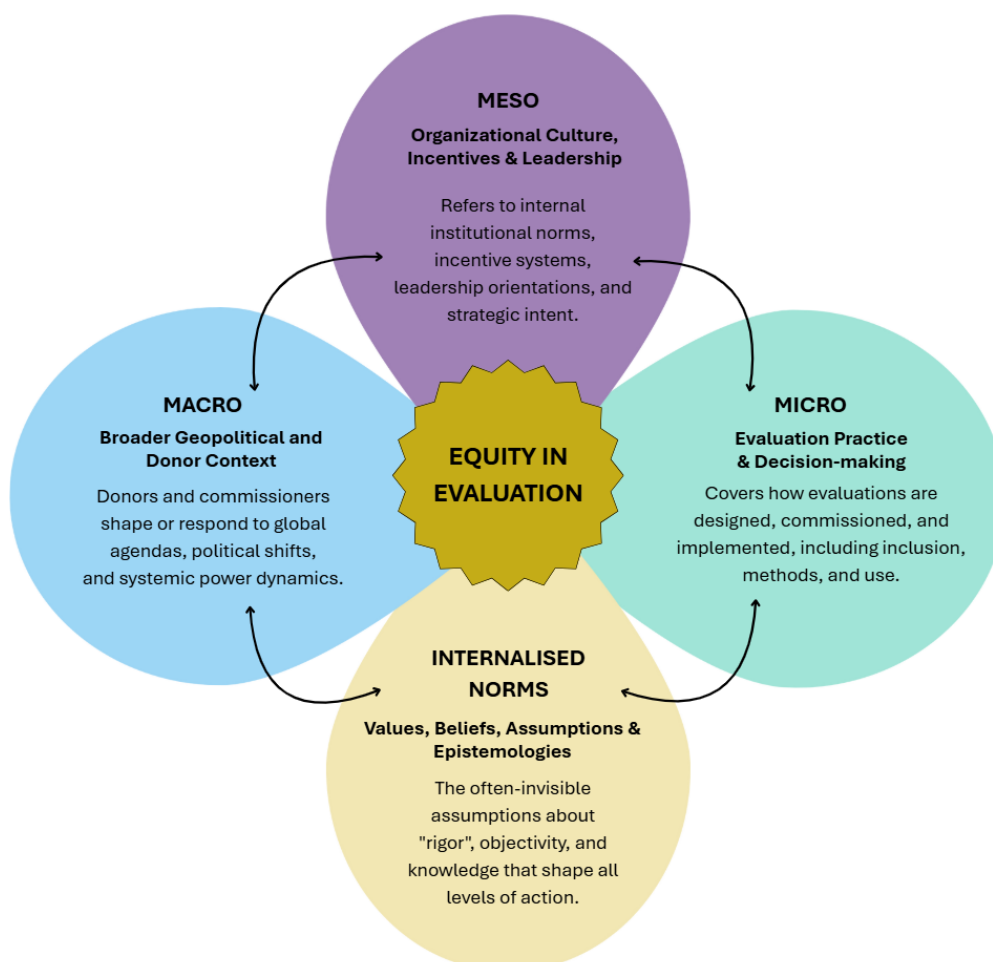
4.3 Four Levels

Whether it is a Lite or Deep Dive Version, the tool guides reflection on **four interconnected levels**. The use of ‘levels’ enables a multi-scalar understanding of how decisions are made and experienced

Macro, meso, micro and internalized norms are different *levels of analysis* to understand how power is distributed, how systems function, and how people experience and respond to structural forces. These levels are not rigid categories, but rather analytical lenses that help unpack the complexity of change, inequality, and agency across contexts. Importantly, these levels are **deeply interconnected**, a change in one can ripple through the others.

The four interconnected levels are:

- **Macro level:** Encourages donors to consider the broader geopolitical and donor context including shifts in political landscapes, foreign policy, and global agendas and how these shape evaluation expectations and outcomes.
- **Meso level:** Focuses on internal organizational strategies, policies, and incentive structures. It prompts donors to assess how equity is institutionalized within decision-making processes, partnerships, and evaluation systems.
- **Micro level:** Addresses operational decisions across the evaluation lifecycle from how RFPs are constructed to who is included in evaluator selection, design, dissemination, and use. It pays particular attention to participation, power sharing, and locally rooted methodologies.
- **Internalized norms:** Refers to the often-unquestioned values and assumptions, which inform or validate socialised norms, and are embedded in organisations. These include what counts as “rigor,” the preference for objectivity over community voice, or the dominance of Western epistemologies that may not reflect how gender, justice, or success are understood in the Global South. By making these norms (and therefore values and assumptions) visible, the tool supports deep dives into more equitable and inclusive evaluation practices.



4.4. Dimensions and Sub-dimensions at each level

Within each level, we identify a set of **dimensions**. These dimensions break down the level into thematic areas that reflect how power, practice, or experience are shaped in that level. For example, at the **meso level**, two of the key dimensions explored are **organisational culture** and **organisational principles**. These help us understand how values are embedded and operationalised within institutions. In the **Lite** version of the tool, assessment extends only to dimensions for all four levels.

Every dimension has **sub-dimensions** which nuance and unpack the dimensions in greater detail. Continuing with the meso-level example, under the dimension of organisational principles, we explore sub-dimensions such as **resource commitment**, **leadership commitment**, and **internal systems for accountability**. In the **Deep Dive** version of the tool, assessment is for all four levels, dimensions and sub-dimensions providing a full comprehensive understanding of how equity is embedded in evaluations by the donor organization or commissioner.

While the tool covers core ‘dimensions’ and ‘sub-dimensions’ of equity in evaluation, it does not presume to address every context. The description of the dimensions and sub-dimensions are **signposts** meant to be adapted depending on needs.

Fig.4.1 - A Snapshot of Levels, Dimensions and Sub-dimensions

Level	Dimensions (Lite)	Sub-Dimensions (Deep Dive)
Meso – organizational policies, culture and practice	A. Evaluation culture	A1. Commitment of leadership towards evaluation with dedicated strategy and team A2. Resource Commitment for evaluations A3. Use of evaluation findings for improving projects and influencing global standards and principles A4. Reflection periodically on own evaluation strategy
	B. Capacities to shift power	B1. Equity reflects in commitment of leadership towards evaluation B2. Equity reflects in resource commitment B3. Use evaluations to advance equity B4. Equity based reflection on evaluation practices
	C. Understand and acknowledge power locations	C1. Power differentials exist and impact quality of evaluation C2. Understand location and privileges in ecosystem C3. Organized studies and research to identify interfaces and corrective actions
	D. Commitment to equity principles	D1. Universal terms D2. Level-playing field elements D3. Emerging paradigms from mainstream D4. Equity terms with ideological base
Micro – the “how”, the operationalization of evaluation	E. Inclusive Request for Proposal – Pre RFP and Developing RFP	E1. Pre RFP: Co-creation E2. Pre RFP: Role and purpose of evaluation E3. Developing the RFP: Reference to equity related concepts E4. Developing the RFP: Promotion of contextual and indigenous approaches
	F. Equity committed Partnerships	F1 Selection of Evaluators – inclusive outreach F2 Selection of Evaluators – review process F3 Partnerships – horizontal and dialogical F4 Partnerships – valuing diverse knowledges

Level	Dimensions (Lite)	Sub-Dimensions (Deep Dive)
	G. Evaluation Frameworks and Findings that center Equity	G1 Evaluation design: Purpose beyond measurement G2 Evaluation design: early and meaningful role for local actors G3 Data collection and analysis: inclusive and ethical data collection G4 Data collection and analysis: Participatory analysis and transformative focus
	H. Use and Dissemination for Promoting Equity	H1 Inclusive accessibility and dissemination H2 Transformative use across levels H3 Community follow-up and feedback loops H4 Shared authorship and recognition
Macro – global power systems	I. Influence of global/country political, ideological and policies on equity in evaluation	I1 Structured context analysis I2 Strategic use of influence I3 Context-specific actions
	J. Actively address power asymmetries after conscious ideological and political analysis	J1 Policy engagement strategy J2 Influencing and monitoring change J3 Context-specific power asymmetries
	K. Respect and resource plurality of epistemologies	K1 Integrating diverse knowledge systems K2 Reflecting on epistemic openness K3 Context-specific epistemic practices
	L. Promote politically savvy responsiveness of evaluation to local and national socio-political landscapes	L1 Respecting local evaluation practices L2 Navigating civic space with equity L3 Context specific political savviness
Internalized Norms – internal values and assumptions	M. Devaluing lived experience N. Undervaluing theorizing capacity of marginal populations O. Partiality in defining impartiality P. Community engagement traded off Q. Delegitimizing local knowledge <i>This is written in a negative tone to stimulate deep conversation and reflection</i>	

4.5 Assessing the Dimensions and Sub-dimensions

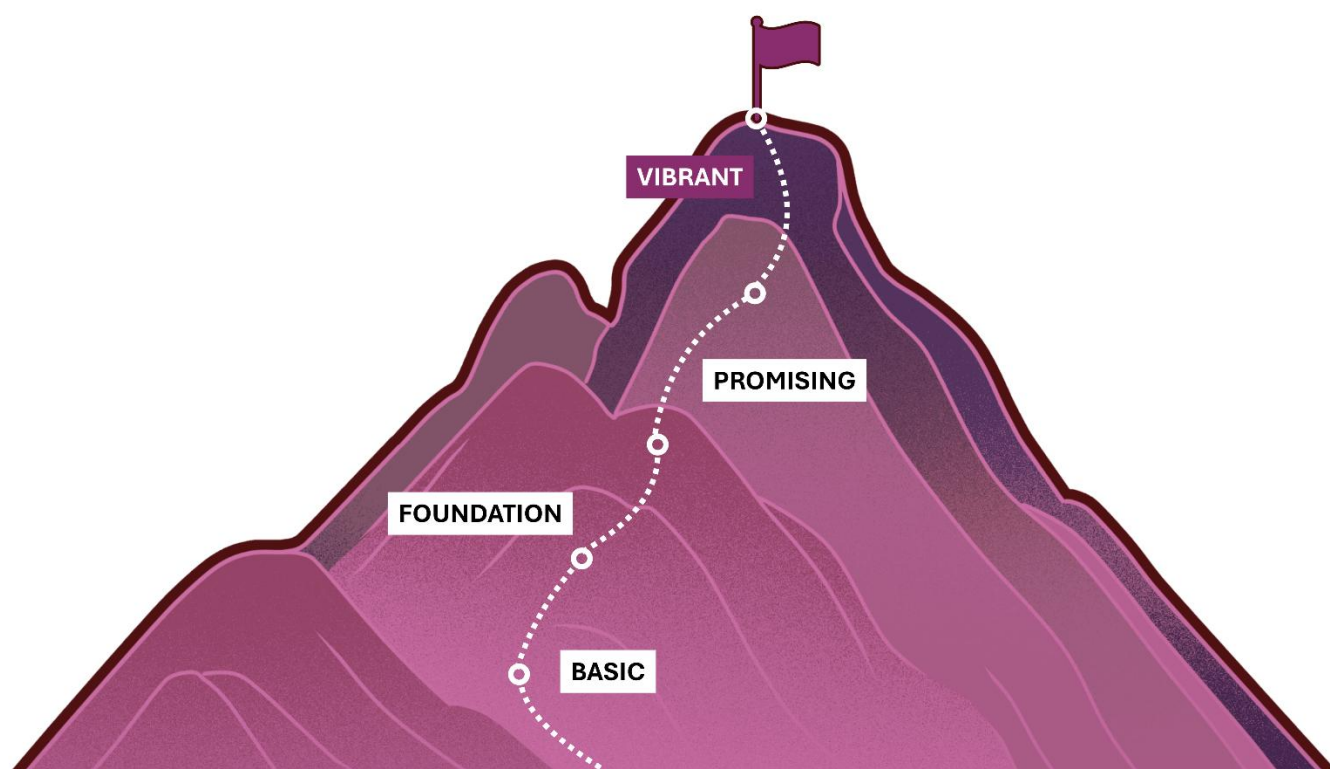
Assessing the dimensions and sub-dimensions in the tool reflects a progression of efforts—from early awareness to intentional action, and eventually to systemic integration—offering a way to locate one’s organisation’s current position while identifying future possibilities. The rubric uses the following terms to score:

Basic – very minimal work/achievements have been made. Evaluation exists as a procedural requirement and equity is not yet an intentional focus in organizational systems or policies

Foundation – specific tasks are being undertaken to lay the groundwork such as reviewing strategies, identifying equity as a value, or initiating conversations around institutional privilege and positionality

Promising – significant strides such as capacity building, changes in internal norms, more inclusive evaluation designs are available but the results are not fully visible or measurable

Vibrant – equity is clearly reflected in outcomes. Evaluation processes are not only shaped by equity principles but also contribute to organizational transformation and sectoral influence. The organization acts as a strong voice and advocates for equity led evaluations in the global evaluation ecosystem



4.6 Centering Power and Equity

The tool centers power and asks some simple but important questions: **Who holds power? Whose voices are heard? How is equity not just talked about—but actually built into the way evaluations are done?** This tool is designed to surface power dynamics and offer ways to redistribute power more equitably—so that evaluation can better reflect, respect, and serve the communities it seeks to learn from.

Power is foundational, and is not a peripheral issue in evaluation. It shapes whose knowledge is considered credible, whose experiences are captured, who defines success, and who benefits from the process. By centering power, this tool invites donors and commissioners to reflect on their own roles—not as neutral observers, but as actors within a larger ecosystem of influence.

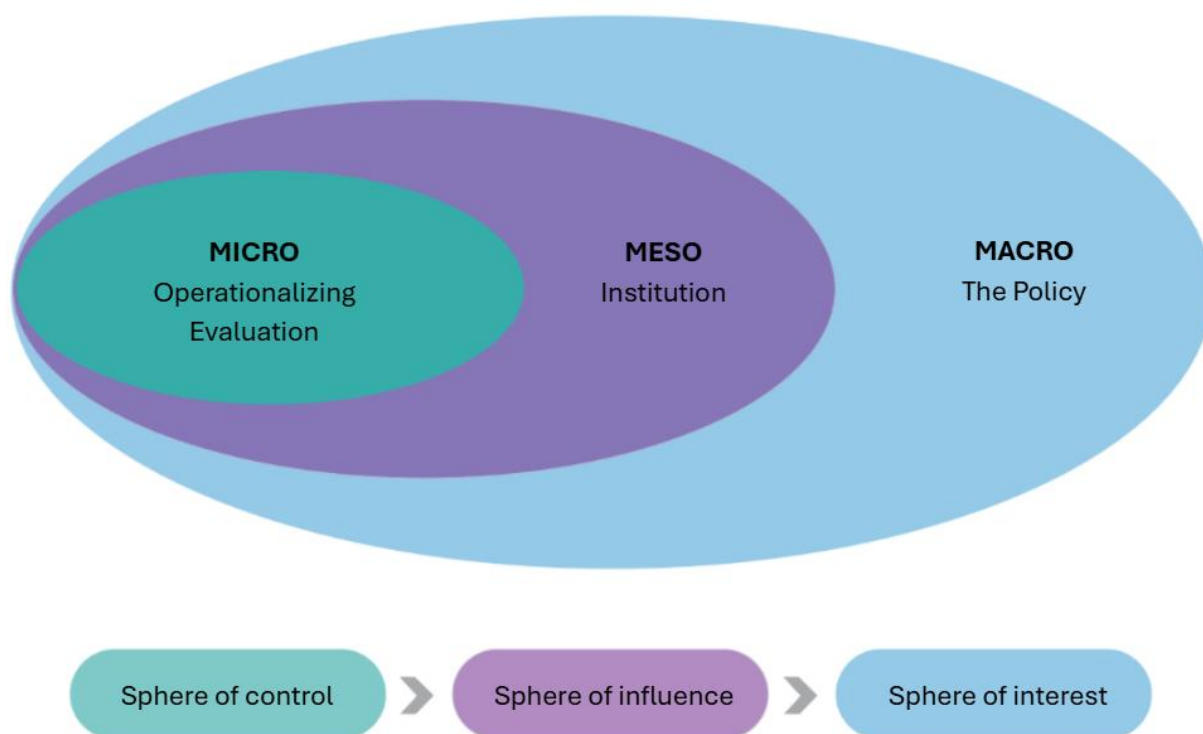
The concepts of **Outcome Mapping** (OM) are useful to understand how power influences and controls decision making at the different levels of macro, meso and micro. Applying OM concepts to these levels, *the sphere of control* refers to what actors' control and can do; *the sphere of influence* refers to what actors can influence but not control; and the *sphere of interest* refers to broader changes actors hope to contribute to but cannot influence directly.

In this tool, the **micro level is the sphere of control**, where donors, because of the power of their resources, are likely to control the evaluation process such as training, resources and design. Negotiations may occur but decision making is primarily with the donor or commissioner of evaluations.

The **meso level is the sphere of influence**, because donors and commissioners by reflecting on organisational intent, internal positioning, and existing capacities, can use the space to drive the pathway to equity with their Board and other decision makers.

The **macro level represents a sphere of interest** and refers to the wider system or long-term change that donors and commissioners may hope to contribute to but may have challenges in influencing directly.

Fig 4.2 Three levels representing the Spheres of control, influence and interest



5. How To Use the Tool

The tool is intentionally flexible to accommodate the diversity of organisational structures, resources, and operational contexts. The geopolitical realities, institutional types, and evaluation mandates across organisations will vary. The tool is designed to be reflexive, supporting meaningful participation and critical self-examination. **The process of engaging with the tool is as vital as the outcomes it helps to surface**, encouraging ongoing learning and transformation. Here are a few FAQs to facilitate use of the tool.

Is facilitation necessary for the tool?

Facilitation and mentoring are recommended (please see **Module: Next Steps and Engage with us** at the end of this document). While the tool can be used as a self-assessment, we recommend working with a facilitator, especially for teams looking to engage deeply with questions of power and equity. The tool outlines the ‘what’—the key areas for self-reflection—but the ‘how’ is highly contextual and may need to be adapted for each organisation’s history, structure, and political context. A facilitator can help hold space for difficult conversations, ensure balanced participation, and guide the group through the process with care.

We recommend selecting facilitators who have:

- Knowledge of participatory approaches,
- An understanding of geopolitical context, and
- An inclusion-based worldview that recognises and questions structural inequalities.

To move beyond internal hierarchies and institutional blind spots, it may be particularly helpful to engage an external facilitator who can support more objective reflection and help surface unspoken assumptions and tensions.

How much time will the tool take?

Depending on your organisation’s size and level of engagement, the time taken for this process could differ. It is recommended to go through the sections of the tool in the order in which they are presented. Begin with situating who and what the organization is (readiness mapping), move to an analysis at the meso level, then micro, macro and internalized norms. Allow time for reflection and dialogue.

How do you choose between a Lite or Deep Dive Module?

The **Lite** approach may be used if the organization is familiar with the analysis at meso, micro, meso and internalized levels or if time is scarce. Being rapid, the Lite approach could be a ‘tasting menu’ for familiarizing the group for deeper analysis. It could also be used to pulse check from time to time, if the Deep dives approach has been completed earlier. Any of these reasons may justify the use of the **Lite approach**. What matters most is the quality of reflection and dialogue that the tool encourages.

A **Deep Dive** approach is the most comprehensive but it is time consuming as the analysis is deeper and detailed across all levels, all dimensions and sub-dimensions. The Deep Dive may be considered if the team is interested in working together over a couple of days, preferably with a facilitator.

In what order should the levels be analyzed in either the Lite or Deep Dive Module?

The tool uses a structured framework that operates across multiple levels of analysis - macro, meso, micro, and internalized norms. As mentioned earlier, these levels help us locate where power is situated, how decisions are made and enacted, and where change can be initiated. Each level captures a distinct scale of influence, from broad systemic forces to everyday relational dynamics.

The tool begins with the **meso level**, which is often the *most familiar and actionable space* for most commissioners. It encompasses internal policies, structures, and organisational commitments, which influences their work.

After the meso level, the tool describes the **micro level**, which explores how equity is practiced within the concrete

processes of commissioning and conducting evaluations. Here, we map the various steps of evaluation by the commissioner during the design and implementation of evaluation.

The tool then addresses the **macro level**, which requires donors to critically assess their organisation's role in the broader systems of power, such as national, regional, and global policy-making spaces and its stance on colonial legacies and global dynamics.

While **the macro level** often appears distant or abstract, it is important for the tool to also recognise the ways in which macro-level systems shape organisational practice. Returning to the idea of **interconnectedness across levels**, the tool highlights that our actions are not isolated from these systemic forces. Decisions around funding flows, narratives, partnerships, and knowledge validation are all informed - consciously or unconsciously - by macro-level norms and power relations.

Therefore, engaging with the macro level is not just about acknowledging the system "out there" but about **examining how it lives within our work**, and how our organisational choices might either reproduce or disrupt broader patterns of inequality. Recognising this interdependence helps situate change as a relational process, where the boundaries between influence, interest, and responsibility are fluid rather than fixed.

Finally, the tool concludes with a focus on the fourth level or **internalised norms**, inviting deep reflection on the values, assumptions, and implicit power relations that shape how equity is understood and enacted *within the organisation*. This final layer helps bridge the gap between structure and practice, organisational stance and personal accountability.

Each level builds on the previous one, supporting a holistic and iterative engagement with equity, not as a fixed endpoint, but as a continuous journey of organisational transformation.

Table 5.1: Distribution of Levels in Lite and Deep Dive Approaches/Modules

Lite Levels	Common to Lite and Deep Dive	Deep Dive Levels
	Readiness	
Meso		Meso
Micro		Micro
Macro		Macro
	Internalized Norms	

Is it possible to focus on only one or two levels in the Lite and/or Deep Design?

The tool also allows users to be level-centric - that is, focus on one or two level/s of the tool such as macro, meso, micro, or internalised norms - depending on their specific priorities, timing, or area of influence. Once a level is selected, users can then choose to engage with it in either a Lite or Deep Dive format or in both.

For instance, an organisation may choose to focus solely on the **micro level**, exploring either the dimensions only (Lite) or going deeper into sub-dimensions such as participatory design, feedback loops, or inclusion of lived experience (Deep Dive). This approach is particularly useful for teams that want to go deep in a targeted way - either because they have limited time or because a particular level is especially relevant to their current work (e.g., focusing on frontline participation in evaluation). The tool is designed to offer flexibility and adaptability, while still maintaining the analytical depth and reflective intent of the tool. It enables organisations to engage meaningfully with the tool even if they are not ready or able to work across all four levels simultaneously.

By working across levels and drilling down through dimensions and sub-dimensions, the tool helps users surface both structural patterns and everyday realities, allowing for contextually grounded and actionable insights.

Here are a few steps to start the process:

1. **Readiness Mapping:** This is a **preparatory** phase where an organization can begin by identifying who will lead the process.

Tip: Form a diverse group that includes stakeholders from across departments and organisational levels. Pay close attention to internal power dynamics, particularly around gender, caste, race, disability, and seniority, to ensure meaningful and inclusive participation.

2. **Selection of the Lite or Deep Dive Module or Level:** Decide whether to use the Lite or the Deep Dive approaches. Also, decide whether to apply the tool across all levels (macro, meso, micro, internalised norms), or to focus on one or two levels most relevant to your context. This could be informed by current priorities, timing, or organisational readiness. For instance, a team might begin with the micro level if they want to focus on participatory practice, or start at the meso level to reflect on internal structures and culture. The level-centric option provides flexibility and allows for deep engagement with selected areas.
3. **Internalized Norms:** All organisations are expected to complete this level whether it is Lite or Deep Dive or if a certain level or levels are selected. It is important because the **Internalised Norms** level surfaces underlying assumptions, behaviours, and belief systems that shape organisational culture and influence how equity and power are addressed in practice.

Readiness Mapping and Internalized Norms are two sections that act as **anchor points** for the equity assessment process, determining where the organisation is starting from, and ensuring that reflection concludes with an examination of the often-invisible norms that underpin practice. Together, they provide essential framing and closure for any version of the tool.

4. **Using the rubric to assess the dimensions and sub-dimensions:** Organisations may find themselves at different stages of the equity journey. The tool acknowledges that embedding equity in evaluations is not a one-time achievement but an evolving process.

The toolkit is designed as a self-assessment resource, grounded in self-defined and context-specific benchmarks. These benchmarks are intentionally flexible and temporal, acknowledging that an organisation's understanding of equity and evaluation will evolve over time.

At this stage, the toolkit does not provide a fixed benchmarking continuum for each parameter. In general, standardised benchmarks are relevant for cross-organisational comparability, but as of now this tool is not meant to compare organisations with one another.

Instead, the aim is to support reflective and developmental assessment within each organisation. For each parameter, users are encouraged to consider a four-stage progression from *Basic* to *Vibrant*. The *Vibrant* stage should be interpreted as the organisation's current aspirational benchmark, based on its own knowledge, context, and values. As learning deepens and experience grows, this ideal will naturally shift.

The emphasis is not only on identifying where the organisation stands now, but also on tracking how its internal benchmarks and aspirations have changed over time. This provides a meaningful lens to understand growth, stagnation, or shifts in equity commitments.

While going through this toolkit, two reflective options are offered for each dimension to use the rubric:

- **Option 1:** Begin by locating the organisation within each dimension. Then discuss the rationale for this placement. Use this rationale to articulate what the *Vibrant* stage would look like, based on current organisational understanding.
- **Option 2:** Begin by collectively defining what the ideal (*Vibrant*) state would look like for the organisation in the given dimension. Then assess where the organisation currently stands and the reasoning behind it.

In both approaches, the quality of reflection—rather than the option itself—is what generates insight. The focus is on honest dialogue, shared understanding, and a commitment to evolving equity-centred practice.

While reflecting on the statements as a group, read each statement aloud and discuss the questions mentioned. *(Use this as an opportunity for collective sense-making. Encourage openness, active listening, and a recognition of different forms of knowledge.)*

Which of the statements make most sense for our organisation or partnership?

Whose experiences or perspectives are we centring in this assessment? Whose are missing?

Where do we see alignment or dissonance among our responses? Why?

What enables our current practice—and what limits further progress?

5. **Application of Findings:** The tool requires the user to identify action points to address the findings. The rubric provides the benchmark about the position for each dimension and sub-dimension. The action points are meant to enable the organization to move from a lower to a higher position in the rubric.
 6. **Continual review:** The tool is not intended to be used once and filed away. It should evolve with your organisation's journey toward equity and can be revisited as strategies, structures, and contexts shift.
- 

MODULE ONE: READINESS MAPPING

Readiness Mapping: Who are we?

This toolkit is designed for commissioners of evaluations, specifically those from donor organizations. Within the organisation, we encourage participants in the equity assessment process to be a diverse team across roles and identities—one that not only completes the tool but can also carry forward its insights into strategic and actionable change.

Step One:

Begin the readiness mapping by addressing the following questions:

1. What kind of entity are we?

- *Multilateral donors*
- *Corporate/Private entities implementing corporate responsibility initiatives*
- *Bilateral governmental donors*
- *Philanthropies*
- *Religious grant-maker*
- *Community-based foundations and community-funds*
- *Others* _____

Where are we headquartered?

Where do we operate?

What does our presence look like in the Global South?

2. What are the different hats we wear (multiple options possible)

- ☐ *Funder – We commission or fund evaluations as part of our grant-making or programme support.*
- ☐ *Commissioner – We design and oversee evaluations, defining their purpose, scope, and use.*
- ☐ *Implementer – We carry out programmes or projects that are evaluated by others.*
- ☐ *Evaluator – We conduct evaluations, either internally or for other organisations.*
- ☐ *Knowledge Generator – We use evaluation findings to contribute to wider learning and evidence-building.*
- ☐ *Learning Partner – We use evaluations to strengthen partnerships, reflect on practice, and inform future strategies.*
- ☐ *Policy Influencer – We use evaluation to inform policy decisions, advocate for change, or shape public discourse.*
- ☐ *Capacity Builder – We support others to improve their evaluation capacity, tools, and approaches.*
- ☐ *Network Convenor – We bring together stakeholders to share learning from evaluations and shape collective action.*
- ☐ *Other (please specify):* _____

How often do we commission or design evaluations, and at what stage are we most involved?

Which team makes the decisions on evaluations? Who is consulted and at what stages? (Programme Team, Evaluand, Independent procurement Team, Evaluation Division, affected communities)

Step Two:

As part of the readiness mapping session, participants are invited to examine their organisation's identity, location and position within the international cooperation and evaluation ecosystem, and thus their access, power and privilege. By acknowledging their role, participants can reflect on how they wield power, and its influence and impact on promoting equity in evaluations.

Do we acknowledge the following:

	Understanding who we are	Applicable/Not Applicable
Q1	As a commissioner of evaluations, we have significant influence over resource allocation towards evaluations, evaluator selection, evaluation design and control, and result dissemination and utilisation.	
Q2	As a commissioner of evaluation from an entity that wears other caps, we have the following additional power associated with	
	(a) being a donor or funder	
	(b) being a bilateral Government Donor that could influence and be influenced by the Government priorities	
	(c) having access to certain decision-making spaces (For example, OECD-DAC) that could influence global policies and principles of evaluations	
	(d) having resources to organise and support global events and conferences (global and regional conferences on evaluations) on evaluations and other related domains that set narratives around evaluations	
	(e).....	
Q3	Being located in the dominant region that controls the global geo-politics, we have the following additional power associated with	
	(a) having access to global multilateral committees and spaces that determine guiding principles on evaluations	
	(b) having access to Universities and colleges, and Journals in the Global North that have acquired dominant status in the knowledge ecosystem. (applicable? not applicable)	
	(c)	
Q4	There are power dynamics within the organisation, that influence the spaces, within organisation, needed to promote equity	
	(a) Power dynamics with the Board or senior management, which feels greater responsibility of sustaining the organisation over everything else	
	(b) Power dynamics between the grant making arm and the evaluation wing	
	(c)	

Having understood our positionality by reflecting on above questions, let us review a few reflective questions: -

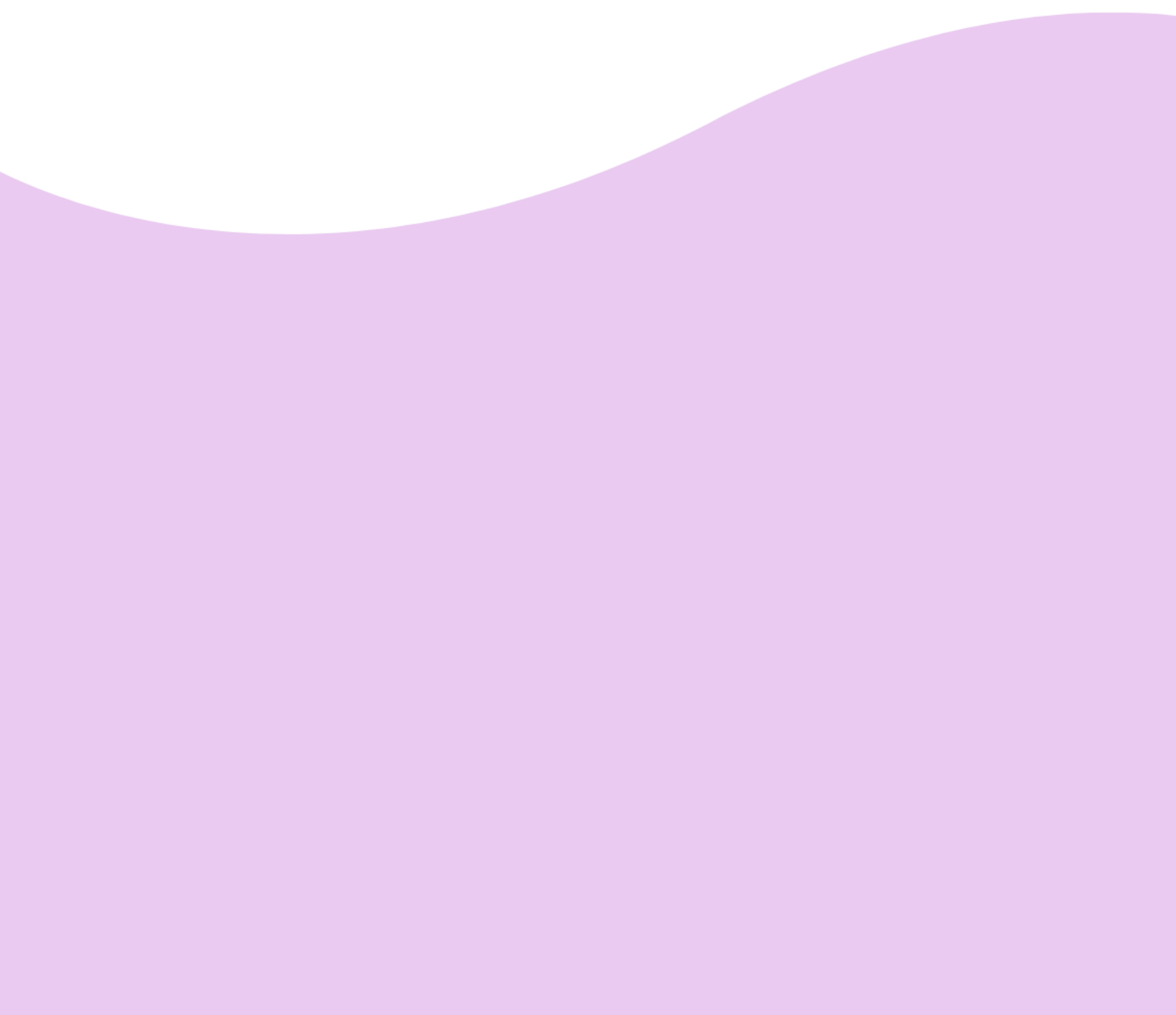
Step Three:

Discuss and reflect

- *Who is participating in this assessment process? Which teams, departments, and levels of seniority are represented?*
- *Whose perspectives are currently included or excluded in this process?*
- *How are we addressing internal power dynamics related to race, gender, class, geography, or role?*
- *Why are we undertaking this self-assessment now? What do we hope to learn or shift as a result?*
- *Do we have a team or mechanism in place to take forward what emerges from this tool into organisational action?*
- *What push-back or barriers to change might we encounter in this process?*

In conclusion, the Readiness mapping enables critical reflection on Power and Positionality. As we reflect on our position within the evaluation ecosystem, the purpose of this exercise is that we must acknowledge the privileges and influences that shape how evaluations are designed, commissioned, implemented, and used, considering factors like organizational roles, funding flows, organisational histories, and individual identities.

This self-awareness enables us to use our power responsibly and create more equitable and inclusive evaluation practices.



MODULE TWO: LITE APPROACH

Undergoing **readiness mapping as explained in section (above)** allows us to reflect on our **positionality as an organisation**. As stated earlier, there are three levels of engagement (the fourth level of internalized norms is described in Module 4) in the Lite Approach:

Macro level - global power dynamics, policies, and guidelines;

Meso level - organisational policies, practices, systems, and structure; and

Micro level - processes and practices during the rollout of evaluations and their use.

1. Meso Level Lite

The meso level is often the most tangible entry point for embedding equity in evaluation. It focuses on the institutional and organizational sphere—where commissioners usually have the most familiarity, access, and influence, and where change can be initiated. At this level, participants reflect on internal policies, operational norms, funding mechanisms, staffing, and decision-making processes—the levers that shape evaluation culture, values, voice, and learning.

To integrate equity into our organisational systems, four dimensions provide a reflective framework for embedding equity in our evaluations - Evaluation culture, Capacity to shift power, Understand power locations, and Commitment to equity principles.

These **four dimensions** are:

A: We have an Evaluation Culture

Do we have an evaluation culture that values evidence and learning? Conducting many evaluations does not equal an evaluation culture. Too often, evidence is cherry-picked to justify predetermined decisions. A genuine evaluation culture integrates evaluation into organizational learning, knowledge, and decision-making, ensuring evidence informs programmes, partnerships, advocacy, and philosophy. Without this foundation, equity in evaluation cannot be sustained.

B: We have capacities to shift power in evaluations

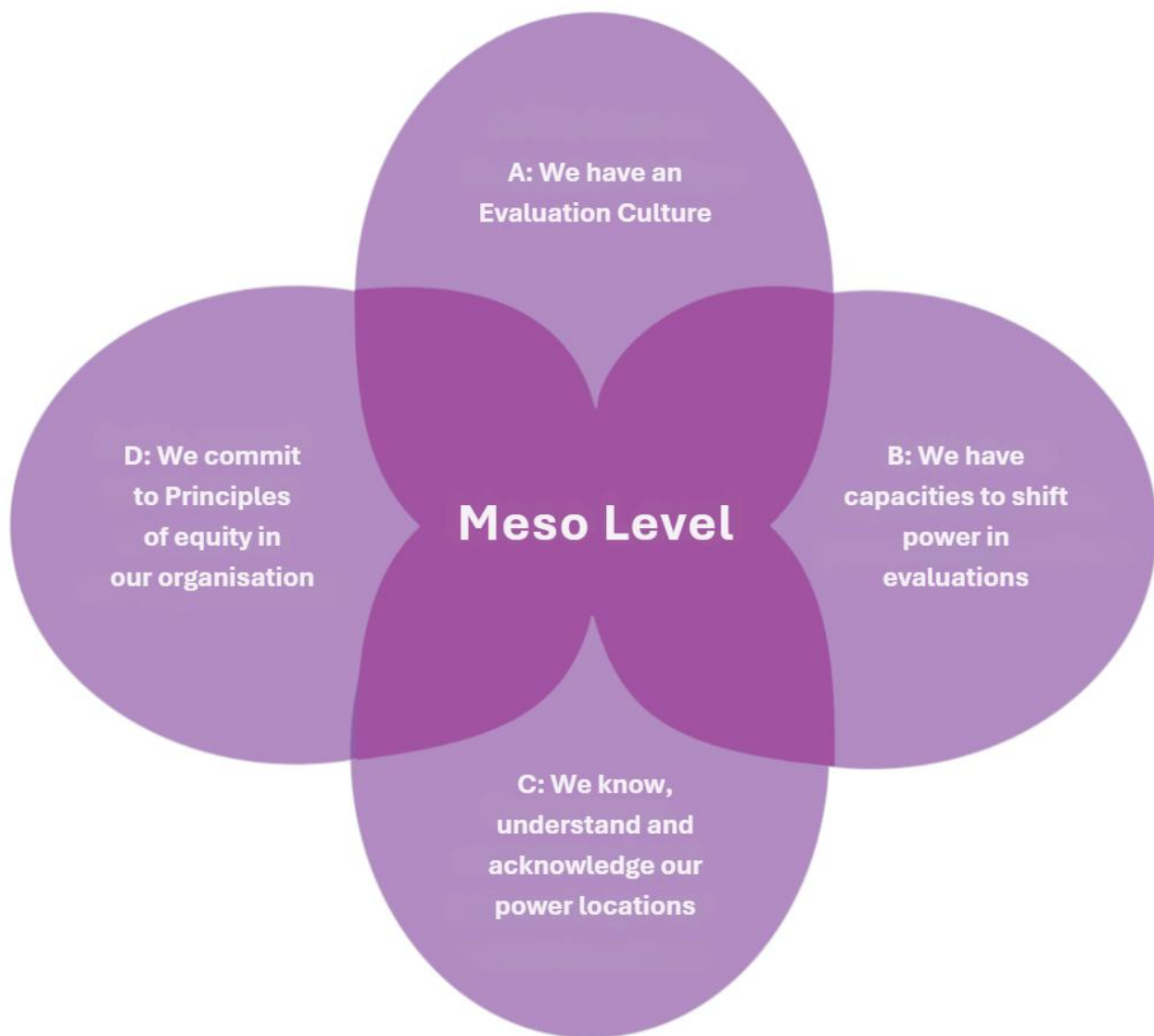
Over time, organizations develop knowledge and strategies to embed equity principles. This evolving capacity is a journey and defines organizational politics and philosophy and is recognized by external stakeholders. It reflects our ability to make informed, equity-driven decisions that align with global commitments.

C: We know, understand and acknowledge our power locations.

We recognize our organization's position within the international cooperation sector, acknowledge privileges, and understand how these affect evaluation partnerships and quality. We understand that power differences exist and affect evaluation quality. Commitment to identifying and addressing these dynamics requires research, reflection, and corrective action.

D: We commit to Principles of equity in our organisation

Before embedding equity in evaluations, we must examine whether it is embedded in our core values and history. This involves reflecting on our strategies, identity, commitments, and assessing how principles such as equity, equality, justice, intersectionality, and feminism align with our mission and values.



Meso Lite Analysis

Instructions for Reflection

For each statement, reflect on which stage your organization is currently in. Place a tick mark under the stage you identify with, and write a brief rationale for your choice. You may define each stage according to your own context.

Dimensions	Basic	Foundation	Promising	Vibrant	Rationale for selection
A: We have an evaluation culture					
B: We have capacities to shift power in evaluations					
C: We know, understand and acknowledge our power locations					
D: We commit to Principles of equity in our organisation					
What would help our organisation in moving into the next stage?					
What can we do in the next three years to be at the Vibrant stage?					

Micro Level Lite

At the micro level, the focus is on the “**how**”, that is the operationalization of evaluation for a specific project, or program. The micro level assesses whether there is a deliberate commitment to democratize power dynamics during evaluation implementation. This level constitutes the sphere of control because commissioners usually have more control about the “**how**” of evaluation.

The geo-political and economic positionality of stakeholders affects who holds decision making power. Donors and commissioners typically wield the most influence, but other actors are also involved: the evaluation team, the program team being evaluated, intermediary or local implementing organizations and the target stakeholders who benefit from the program.

Operationalization includes how evaluations are commissioned and carried out: creation of expressions of interest, evaluation design, team selection, the nature of partnerships between the commissioner, evaluand and evaluator(s), the choice of approaches, tools and methods, data collection and analysis and the dissemination and use of evidence.

Equity in Practice

At this level, we ask: *Are we able to practice equity when rolling out evaluations?* The tool examines how equity is integrated into the commissioner’s **domain** (formal scope and mandate) and **negotiated space** (informal, adaptive, relational influence). These two spheres are distinct but interconnected in shaping evaluation practice.

- **Domain of Commissioner of Evaluation (Practising Equity):** The commissioner’s formal scope, mandate, and authority within their organization. This includes defining the scope of work, discretion limits, and structural frameworks guiding decisions.
- **Commissioners’ Negotiated Space, with primacy to Evaluator’s Autonomy (Spreading Equity):** The informal, adaptive space where influence, alliances, judgment, and values operate. It reflects the agency commissioners can exercise in navigating organizational constraints, stakeholder expectations, and broader contexts.

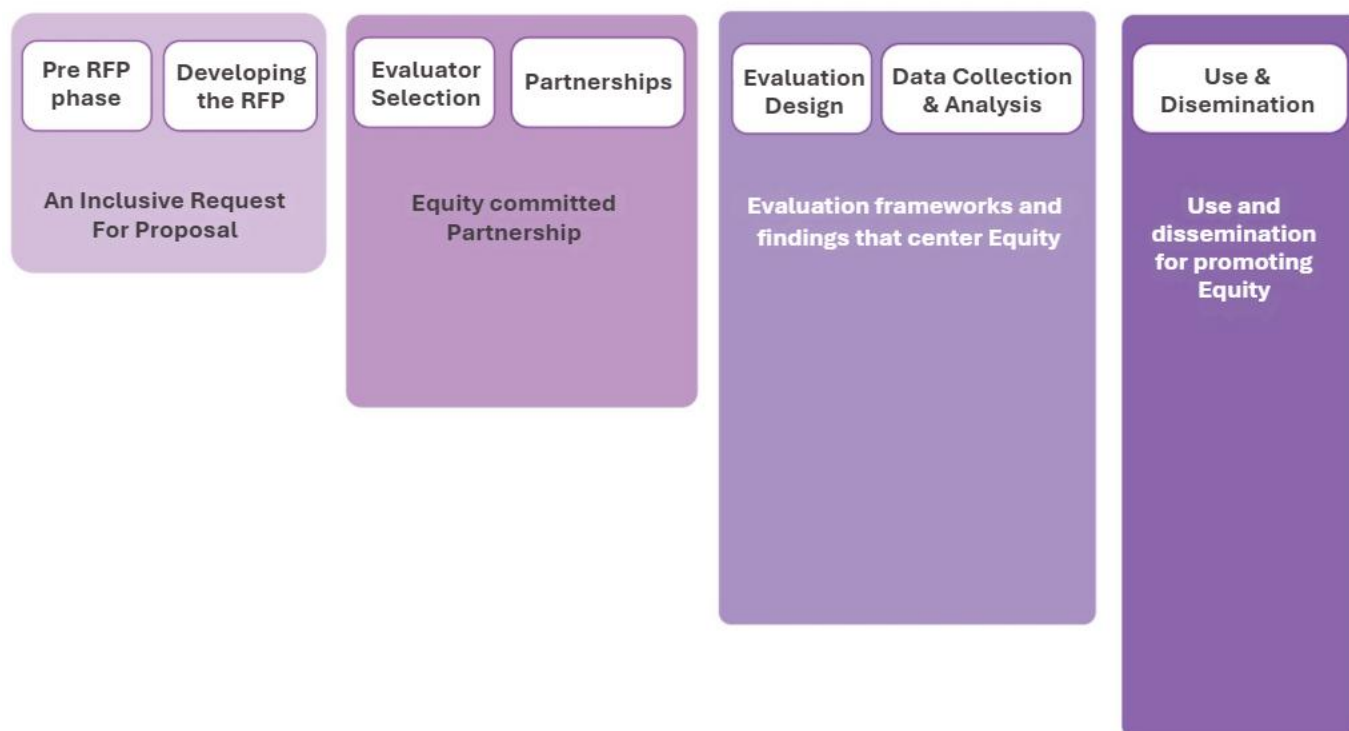
Dimensions

The micro level aligns with the evaluation cycle - commissioning, contracting, design, implementation and use. It includes four key dimensions:

- E) Inclusive Requests for Proposal
- F) Equity-committed Partnerships
- G) Evaluation Frameworks and Findings that center Equity
- H) Use and Dissemination for Promoting Equity.

The **Lite version** asks for reflection and scoring on the dimensions. The **Deep Dive** explores both dimensions and sub-dimensions for a more detailed understanding of equity at the micro level.

Steps for Operationalizing Evaluations and alignment with Micro Dimensions



E: An inclusive Request for Proposal

We explore how the language, format, outreach, and expectations within the RFP either open or close the door to equity-centred actors, approaches, and values. Equity is considered from the moment the evaluation is conceptualised.

F: Equity embedded in partnerships

We have discussed and agreed on values like ownership, flat leadership structure, accountability to local actors (especially the most impacted and marginalized ones), transparency, dialogue and participation, and social transformation.

G: Equitable evaluation frameworks and findings that centre equity

We view evaluation as a learning opportunity not just a way to validate predetermined outcomes, are open to insights that challenge assumptions and are committed to using findings to adapt, improve, and transform – not only to prove.

H: Equitable use and dissemination for promoting equity

We disseminate findings in accessible ways, prioritise learning across audiences, and ensure that evidence informs decision-making in equitable and inclusive directions. Our dissemination choices reflect our equity commitments.

MICRO *Lite* ANALYSIS

Instruction for Reflection

For each statement, reflect on which stage your organization is currently in. Place a tick mark under the stage you identify with, and write a brief rationale for your choice. You may define each stage according to your own context.

Dimensions	Basic	Foundation	Promising	Vibrant	Rationale for selection
E: An Inclusive Request For Proposal					
F: Equity-Committed Partnerships					
G: Evaluation Frameworks and Findings that centre Equity					
H: Use and Dissemination for promoting Equity					
	All 4 are Basic or Foundation	All 4 are Foundation or Promising	All 4 are Promising or Vibrant	All 4 are Vibrant	
What is missing that would help our organisation in moving into the next stage?					
What can we do in the next three years to be at the Vibrant stage?					

3. Macro Level Lite

The macro level focuses on political, ideological, and policy engagement at national, regional, and global levels. Its purpose is to establish equity-centered principles and approaches for evaluating international cooperation programming.

Southern-led action research revealed contrasting donor practices. Some donors and commissioners actively use their standing to engage government officials, parliamentarians, ministers, sectoral associations, networks, and other policy stakeholders. By doing so, they create space for debate, inclusion, and the promotion of equity, justice, and power-shifting as guiding principles in international cooperation and evaluation.

Others, however, avoid challenging restrictive spaces and remain comfortable with the status quo. These donors replicate policies and practices that fail to disrupt inequitable dynamics, thereby keeping non-mainstream voices, approaches, and perspectives marginalized.

A truly equity-driven approach requires donors and commissioners to engage proactively at the macro level, helping create structural conditions for equity, justice, and decolonization. At this stage, the equity-assessment tool encourages donors to reflect on whether, why, and how they are contributing to transforming the international cooperation sector.

To support this, the tool proposes a **context analysis exercise** to ground policy strategies, tactics, and behaviors in their historical and contextual realities.

Light-touch context analysis

For this exercise, evaluation teams may reflect on the following guiding questions:

Donors and Commissioners' political and ideological environment	• What's the most prevalent ideology in (the donor) country and/or governance infrastructure directly influencing the evaluation teams' work? • How is the [evaluation team] positioned in relation to this prevalent ideology? • How does this ideology shape legislation, institutional- building, policy decisions and other factors that might create the specific landscape where the evaluation team operates? • How would you describe your level of independence and flexibility to operate within the limits of this environment?
Donors' stakeholder mapping	• Who are the key political and policy stakeholders influencing your decision-making, operations and behaviours? • How do you engage with them and what are the implications for centering equity and justice as guiding principles in evaluation?
Donors' engagement with policy stakeholders in funded countries	• What relationships exist with political and policy decision-makers in funded countries? • How might this relationship enable or hinder your ability to introduce progressive, innovative, equity and justice-centered evaluation policies and practices?

After this group context and mapping analysis, donors and commissioners are encouraged to ask:

1. Are we using our power to help transform the policies and ideologies that undermine equity, justice and decolonization?
2. Could we use our power differently?
3. Should we engage more, better, or differently to support marginalized voices in advancing the transformations they envision globally, regionally and in their communities?

Teams may also reflect on other complementary questions to deepen understanding of the connections between political/ideological contexts and evaluation of international cooperation initiatives.

The conclusions from this reflection can serve as a baseline for donors' strategies and tactics, helping foster allyship with grantees and partners to open space for refreshed and decolonial ways of working.

The following template summarizes the discussion above and may be used as a worksheet during group discussions:

Use this *worksheet* to reflect on how political, ideological, and policy contexts shape your evaluation practices. For each guiding question, note your reflections and identify implications for advancing equity, justice, and decolonization.

Context Analysis Worksheet

Section 1. Donor Political and Ideological Environment

Guiding Question	Reflection Notes	Implications for Equity & Justice
What is the most prevalent ideology in the donor country/governance structures?		
How is the evaluation team positioned in relation to this ideology?		
How does this ideology influence legislation, institutional building, or policy decisions shaping evaluation?		
What level of independence and flexibility does the team have to operate in this context?		

Section 2. Donors' Stakeholder Mapping

Guiding Question	Reflection Notes	Implications for Equity & Justice
Who are the key political and policy stakeholders influencing decision-making and behaviors?		
How do you engage with them, and what are the risks/opportunities for centering equity and justice?		

Section 3. Donor's Engagement with Funded Country Stakeholders

Guiding Question	Reflection Notes	Implications for Equity & Justice
What relationships exist with political and policy decision-makers in funded countries?		
How might these relationships enable or hinder progressive, equity-centered evaluation policies and practices?		

Synthesis & Deeper Reflection

Core Question	Reflection Notes	Next Steps/Strategies
Are we using our power to help transform policies and ideologies that undermine equity, justice, and decolonization?		
Could we use our power differently?		
Should we engage more/better/differently to support marginalized voices in their envisioned transformations?		

Lite Analysis

Once the light-touch context analysis is concluded, participants are invited to complete the “*Lite analysis*” for four dimensions.

I: We acknowledge the influence of political, ideological and policy on equity in evaluation

Donors and commissioners operate within national and regional political ecosystems that may enable or constrain equity-centred evaluation. At the same time, most donors are external actors, **working** in geographies that are not their own. This dimension invites reflection on donors' level of awareness and acknowledgement on how donors' own ideological, political and policy environments shape their decision-making and influences negatively or positively both the global ecosystem and partners' ability to advance equity in evaluation. It's an opportunity to honestly assess ideological, political and policy issues at donor-country level that might create barriers to equity and justice, even in those contexts that are defined as “democratic”.

J: We actively address power asymmetries, after conscious ideological, political and policy analysis

From acknowledgement comes action. This dimension invites donors and commissioners to reflect on long-standing imbalances in power, resources, and decision-making between Global North and Global South. It calls for examination of how colonial legacies and dominant ideologies continue to shape organizational cultures, and whether donors are actively shifting power. This includes committing to strategies that prioritize and resource the voices, knowledge, and leadership of Global South actors—particularly the most marginalized.

K: We respect and resource a plurality of epistemologies in evaluation

From action comes openness to diversity, inclusion, and representation in evaluation policy and practice. This dimension asks how donors promote epistemic justice by valuing multiple knowledge systems, including Indigenous and community-based approaches. It includes supporting use of local languages, contracting local evaluators, and fostering culturally rooted methodologies. Equity requires creating space for contested, evolving truths and resourcing practices that shift whose knowledge counts. Donors must also work to change global, regional, and national frameworks that limit diversity, inclusion and representation.

L: We promote politically savvy responsiveness of evaluation to the local/national (funded countries) socio-political landscape

This dimension invites reflection on whether evaluation processes are open to grantees and partners' local, national, and regional policies that are relevant and meaningful to the constituencies being evaluated. It emphasizes the importance of balancing exogenous criteria with the recognition, respect and inclusion of contextually appropriate legislation, frameworks and policy-guidance that might promote self-reliance, independence and autonomous knowledge creation. In restrictive policy environments (for example closed-civic space countries), donors fund opportunities for grantees and partners to safely and creatively challenge the status-quo, adapting to evolving risks and challenges on the ground rather than terminating their support.

Instruction for Reflection

For each statement, reflect on which stage your organization is currently in. Place a tick mark under the stage you identify with, and write a brief rationale for your choice. You may define each stage according to your own context.

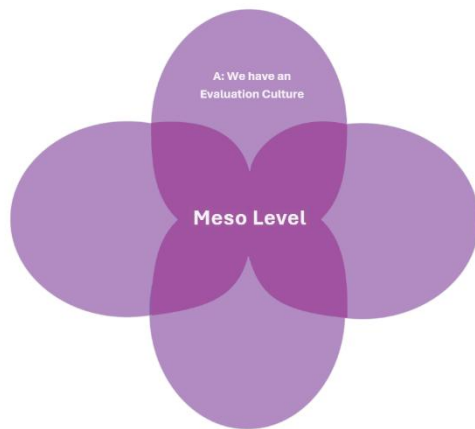
Macro Lite Analysis

Dimensions	Basic	Foundation	Promising	Vibrant	Rationale for selection
I: We acknowledge the influence of political, ideological and policy on equity in evaluation					
J: We actively address power asymmetries, after conscious ideological, political and policy analysis					
K: We respect and resource a plurality of epistemologies in evaluation					
L: We critically reflect and promote politically savvy politically the alignment and savvy responsiveness of evaluation to the local/national (funded countries) political landscape					
	All 4 are Basic or Foundation	All 4 are Foundation or Promising	All 4 are Promising or Vibrant	All 4 are Vibrant	
What would help our organisation in moving into the next stage?					
What can we do in the next three years to be at the Vibrant stage?					

MODULE THREE DEEP DIVE

1. MESO LEVEL DEEP DIVE

Dimension A: Evaluation Culture



This dimension invites reflection on what an **evaluation culture** means for the organization. It asks whether evaluation is understood as a **strategic, learning-oriented process** rather than simply a compliance requirement. It examines how deeply evaluation is embedded in governance structures, organizational approaches, and incentive systems.

A few examples of how each sub-dimension might be interpreted are listed below. These serve only as **signposts**—spaces are left open for organizations to define their own parameters and add context-specific choices.

A1. Commitment of Leadership Towards Evaluation

- Have a dedicated, comprehensive strategy on Evaluations
- Dedicated team or unit that anchors evaluations
- Evaluation team head is integral to leadership or has access to influential decision-making spaces

A2. Resource Commitment

- Evaluations are practiced, most programmes are evaluated
- We have committed resources for evaluation. Which is being used and resources are reviewed periodically.

A3. Use

- We have been influencing or attempting to influence global evaluation principles, criteria, etc.
- Have demonstrated the use of evaluation findings for improving our advocacy efforts and/or programme

A4. Reflection

- We evaluate our evaluation strategy in an honest reflective way, periodically

Instructions for Reflection

For each statement, reflect on which stage your organization is currently in. Place a tick mark under the stage you identify with, and write a brief rationale for your choice. You may define each stage according to your own context. Analyze the rationale and identify what is missing, what might help you move to the next stage and four to five action points for the next stage.

Meso Deep Dive Analysis

Dimensions: Evaluation Culture	Basic	Foundation	Promising	Vibrant	Rationale for selection
Sub-dimensions					
A1: Commitment of Leadership Towards Evaluation (dedicated strategy and team with influence in decision making spaces)					
A2. Resource Commitment for evaluations					
A3. Use of evaluation findings for improving projects and influencing global standards/ principles					
A4. Reflection (evaluate our Evaluation strategy in an honest reflective way, periodically)					
	All 4 are Basic or Foundation	All 4 are Foundation or Promising	All 4 are Promising or Vibrant	All 4 are Vibrant	
What is missing that would help our organisation in moving into the next stage?					
What can we do in the next three years to be at the Vibrant stage? (do include 4-5 action points)					

Meso Deep Dive

Dimension B: We have capacities to shift power in evaluations



Dimension B examines whether the organisation has built and sustained the necessary capacities—skills, partnerships, tools, and resources—to design, commission, and use evaluations that are truly equity-centred. It goes beyond technical ability, asking whether the organisation’s evaluation systems and practices reflect its equity commitments.

As one interviewee noted “We have, over years, built, acquired and co-created capacities to embed equity in our evaluations, through a number of capacity building programmes, events, actions and decisions. This is what makes us what we are in terms of our politics and philosophy.”

Reflecting on Dimension A (Evaluation Culture), this dimension digs deeper to assess whether practices are equity-centered. It includes the following sub-dimensions:

B1. Equity reflects in the Commitment of Leadership Towards Evaluation

Our leadership actively supports and advocates for equity in evaluation. This commitment is visible in how evaluations are prioritised, how inclusive processes/approaches/methodologies are enabled, and how findings that challenge dominant views are welcomed. Leaders ask critical questions about equity and drive necessary shifts.

B2. Equity reflects in Resource Commitment

We plan for and dedicate adequate time, funding, and staff support to ensure evaluations are inclusive and responsive to diverse contexts. Our budgets reflect our equity priorities.

B3. We use evaluations to advance equity

Our evaluation findings inform organisational decisions that promote justice, inclusion, and transformation. We ensure findings are interpreted with sensitivity to power and context, and we include diverse voices in sense-making and decision-making processes. We use evaluations not just to improve programmes, but to question and shift systems.

B4. We engage in equity-based reflection on evaluation practices

We regularly reflect on our own evaluation approaches—questioning whose knowledge is valued, whose priorities shape our questions, and what unintended consequences our methods may have. We learn from these reflections and adapt our practices, recognising that embedding equity is a continual journey, not a one-time achievement.

Instruction for Reflection

For each statement, reflect on which stage your organization is currently in. Place a tick mark under the stage you identify with, and write a brief rationale for your choice. You may define each stage according to your own context. Analyze the rationale and identify what is missing, what might help you move to the next stage and four to five action points for the next stage.

Meso Deep Dive Analysis

Dimension B: We have capacities to shift power in evaluations	Basic	Foundation	Promising	Vibrant	Rationale for selection
Sub-dimensions B1: Equity reflects in the Commitment of Leadership Towards Evaluation					
B2. Equity reflects in Resource Commitment					
B3. We use evaluations to advance equity					
B4. We engage in equity-based reflection on evaluation practices					
	All 4 are Basic or Foundation	All 4 are Foundation or Promising	All 4 are Promising or Vibrant	All 4 are Vibrant	
What is missing that would help our organisation in moving into the next stage?					
What can we do in the next three years to be at the Vibrant stage? (do include 4-5 action points)					

Meso Deep Dive

Dimension C: Power



Dimension C reflects on the positionality of the organisation within the development sector and larger social systems. It encourages an honest reckoning with the privileges and forms of authority the organisation holds—and how these shape evaluation relationships. Often, these forms of authority are **so deeply embedded** in how organisations operate that they go unexamined.

As one interviewee said, “Our Power location provides us a set of privileges which may not be available to all. Our being entrenched in this power relationship often is invisible to our own eyes. We understand and acknowledge the same.”

The aim is cultivating awareness—so that evaluation becomes a space for mutual learning and respect, rather than reinforcing hierarchies.

C1. Understanding that Power differential exists in the evaluation ecosystem and that affects standard and quality of evaluation.

- Q1. Do we understand that the evaluation landscape requires a number of power shifts? Have we organised any reflection based on **evidence** to understand the same?

C2. Understands our location in the ecosystem and also privileges associated with that; and need to address them

- Q2. If we have organised, do we understand the privileges and **disprivileges** that we as organisation have in this landscape?

C3. Organised studies, research to identify such interfaces and corrective actions

- Q3. Have we evolved strategies to facilitate a power shift within our organisation as well as in the wider evaluation ecosystem?

Instruction for Reflection

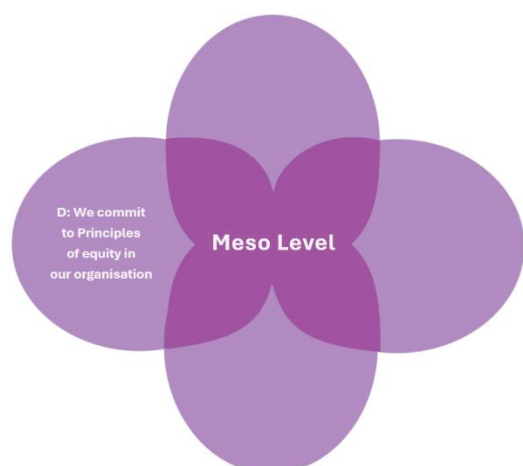
For each statement, reflect on which stage your organization is currently in. Place a tick mark under the stage you identify with, and write a brief rationale for your choice. You may define each stage according to your own context. Analyze the rationale and identify what is missing, what might help you move to the next stage and four to five action points for the next stage.

Meso Deep Dive Analysis

Dimension C: Power	Basic	Foundation	Promising	Vibrant	Rationale for selection
C1: Understanding that Power differential exists in the evaluation ecosystem and that it affects standard and quality of evaluation.					
C2: Understand our location in the ecosystem and also privileges associated with that; and need to address them					
C3: Organised studies, research to identify such interfaces and corrective actions					
What is missing that would help our organisation in moving into the next stage?					
What can we do in the next three years to be at the Vibrant stage? (do include 4-5 action points)					

Meso Deep Dive

Dimension D: Principles of Equity



Dimension D focuses on whether equity is visible in the organisation's core values and formal commitments. This includes how equity has been historically understood, internalised, and articulated across strategies, communications, and organisational identity.

As one interviewee said, "We know, understand and reaffirm the history of how various principles, those we commit to, of equity have got embedded in our organisation."

Preparatory Step One:

Review the terms below, tick mark those that are used by the organisation, and reflect on these questions as you go along:

Q1. Which principles do we resonate with, when we say we are equity focused organisation?

Q2. Is any principle not relevant for our context?

Q3. Do we refrain from using any of these principles?

Q4. Do we aspire to use any of these principles for ourselves?

D1: "Universal" Terms

- Equality
- Doing No Harm
- No Discrimination

D3: Emerging Paradigms from Mainstream

- Intersectionality
- Empowerment
- Localisation/Locally Led Development
- Shifting Power

D2: Level Playing field Elements

- Equity
- Dignity
- Justice
- Shift the power

D4: Equity Terms with ideological base

- Feminism
- Decolonisation
- Anti-Capitalism
- Anti-Racism
- Anti-Casteism
- Anti-Ableism
- LGBTQIA+
- Environment/Ecology

Preparatory Step Two:

Map Equity Milestone within Organisation

The goal is not only to assess current language or policies, but to **trace the journey**:

- How have your commitments to equity emerged?
- How have they shifted or deepened in response to internal discussions, field realities, or global discourse?

The aim is to understand how equity has been historically understood, internalised, and articulated across strategies, communications, and organisational identity. As part of this reflection, organisations are encouraged to create a visual or narrative map of their organisational journey toward equity—tracing how selected terms or commitments (e.g., those selected in the earlier section) have emerged, evolved, or been challenged over time. This mapping exercise can help uncover gaps, milestones, and lived meanings behind formal language. Mapping could be done in any way that makes sense for the organisation, with the aim of reflection.

On a large sheet or board, draw a timeline (or river) representing your organisation’s journey. Mark the start of the organisation/your journey. Then place the selected terms (that you selected in section A above) along the timeline at the point when they were first used or became important.

Add milestones—key events, shifts, policies, or people that influenced how these terms were understood or applied.

Reflect and Discuss

For each milestone or shift, discuss:

- What did the term mean to us then?
- What prompted this shift (e.g. internal learning, external pressures, specific partnerships)?
- How have we acted on it, and where are the gaps?
- What does this reflection tell us about where we are now—and where we need to go next?

Use symbols, drawings, or colours if helpful—this is your shared visual story. The aim is not to be exhaustive but to uncover **patterns, meanings, and growth**.

Instruction for Reflection

For each statement, reflect on which stage your organization is currently in. Place a tick mark under the stage you identify with, and write a brief rationale for your choice. You may define each stage according to your own context. Analyze the rationale and identify what is missing, what might help you move to the next stage and four to five action points for the next stage.

Meso Deep Dive Analysis

Dimension D: Principles of Equity	Basic	Foundation	Promising	Vibrant	Rationale for selection
D1: Universal Terms					
D2: Level Playing field Elements					
D3: Emerging Paradigms from Mainstream					
D4: Equity Terms with ideological base					
What would help our organisation in moving into the next stage?					
What can we do in the next three years to be at the Vibrant stage? (do include 4-5 action points)					

MESO LEVEL SUMMARY

Now that the sub-dimensions have been reviewed, return to the **Lite Analysis at the dimension level**. Make an overall assessment by reviewing the scoring across sub-dimensions and noting whether any changes or additions are needed.

Dimensions	Basic	Foundation	Promising	Vibrant	Rationale for selection
A: We have an Evaluation Culture					
B: We have capacities to shift power in evaluations					
C: We know, understand and acknowledge our power locations					
D: We commit to Principles of equity in our organisation					
What would help our organisation in moving into the next stage?					
What can we do in the next three years to be at the Vibrant stage? (do include 4-5 action points)					

GOOD PRACTICES SHARED WITH US

A. We have an evaluation culture

- **Partner-centred design:** Hosting joint workshops or dialogues with partners to better understand their challenges and experiences, using this insight to refine priorities and strategies.
- **Flexible monitoring practices:** Intentionally reducing overly burdensome compliance requirements and reporting expectations, trusting partners to guide what data is meaningful and appropriate.

B. We have capacities to shift power in evaluations

- **Participatory advisory structures:** Co-creating governance and learning structures that include diverse voices—especially those from the Global South or directly affected communities—to shape evaluation priorities and interpretation.
- **Peer learning spaces:** Enable cross-organisational or peer funder learning spaces focused on equity in evaluation practice, where experiences and challenges are shared openly.

C. We know, understand, and acknowledge our power locations

- **Reflexive practice:** Engaging in regular internal reflection on how funding practices, evaluation requirements, or framing may reinforce hierarchies.
- **Shared sensemaking:** Invite partners into meaning-making stages of evaluation, recognising how interpretation can be influenced by power and positionality.

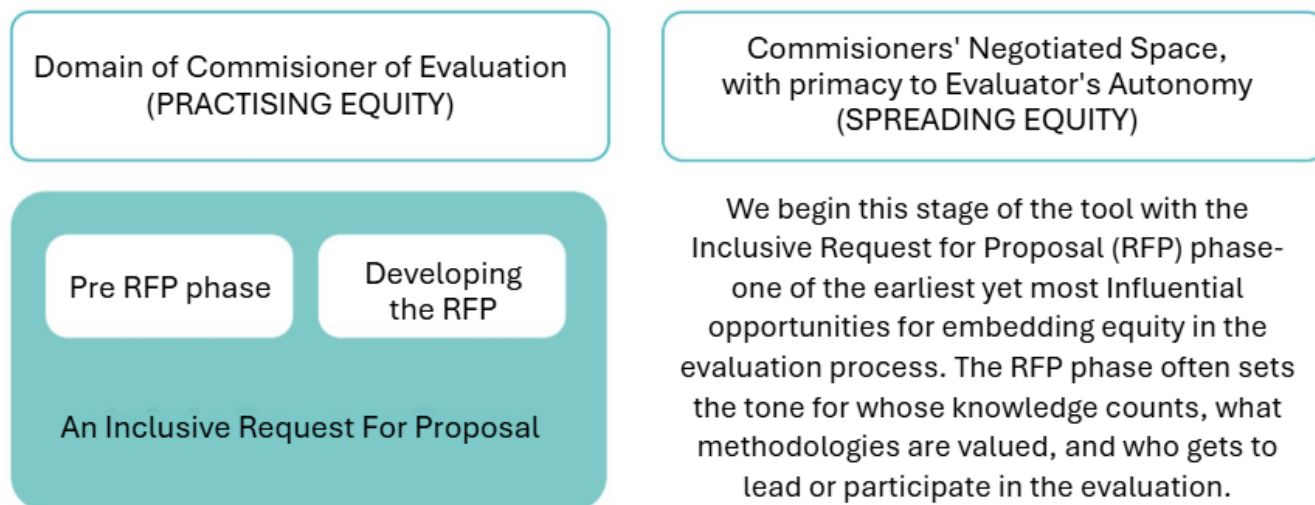
D. We commit to principles of equity in our organisation

- **Navigating complexity with humility:** Using adaptive feedback loops and iterative reflection mechanisms to navigate shifting institutional landscapes while remaining grounded in our equity commitments.
 - **Embedding equity in systems:** Equity commitments are reflected not only in programming, but also in recruitment, partnerships, evaluation commissioning, and how decisions are made institutionally.
- 

2. MICRO LEVEL DEEP DIVE

We now analyze the dimensions and sub-dimensions at the Micro level

DIMENSION E: INCLUSIVE REQUEST FOR PROPOSAL (RFP)



Dimension E: Inclusive Request for Proposal (RFP) phase has two parts 1) Pre RFP and 2) Developing the RFP.

Instruction for Reflection

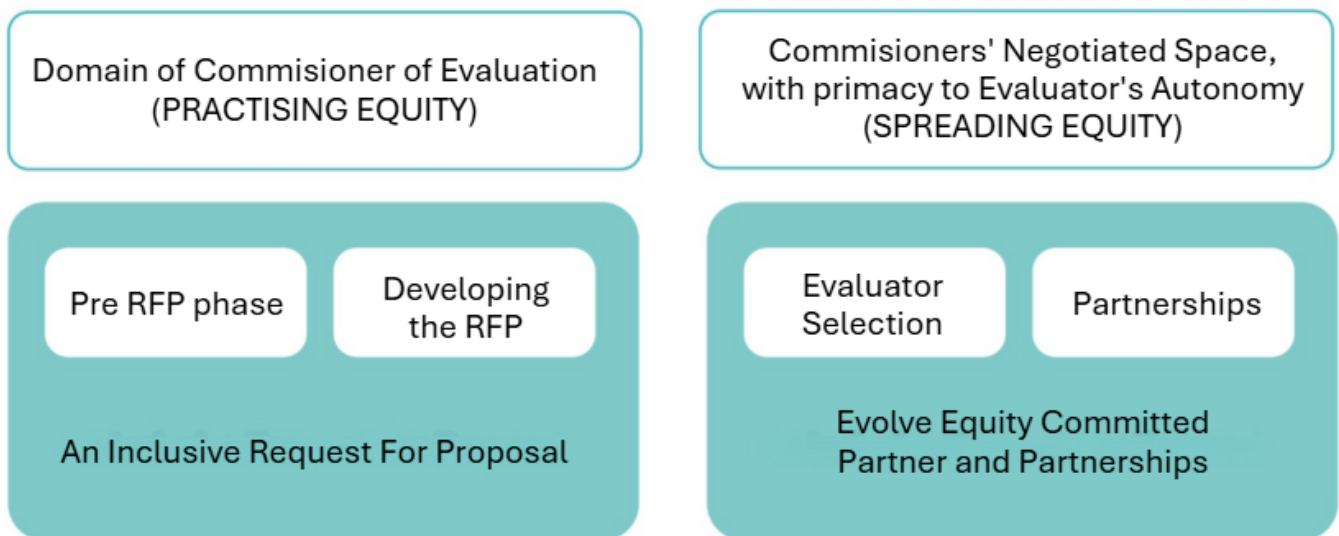
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Dimension E. Inclusive Request for Proposal (RFP)	Basic	Foundation	Promising	Vibrant	Rationale for selection
Pre RFP E1: Co-creation: We ensure that the RFP is co-developed with inputs from the evaluation or implementing team and key learning questions reflect what the evaluand and affected communities want to know.					
Pre RFP E2: Role and Purpose of Evaluation: We have discussed and agreed on values like ownership, horizontality, accountability to local actors (especially the most impacted and marginalized), and collectively discussed the role and purpose of evaluation for different stakeholders					

Dimension E. Inclusive Request for Proposal (RFP)	Basic	Foundation	Promising	Vibrant	Rationale for selection
Developing the RFP E3: Our RFP includes explicit references to equity-related concepts (even if the programme does not name equity as a goal). e.g., participation, localization, feminist, intersectional, culturally responsive); terms are not jargon but are backed by a clear expectation of how they should inform evaluation approaches.					
Developing the RFP E4: Promotion of contextual and indigenous approaches: We ensure that the RFP encourages the use of diverse, context-sensitive evaluation designs—especially those that draw from indigenous, feminist, and non-Western traditions and does not default to standardized indicators, indexes, or ratings unless justified by the context and co-created with those being evaluated.					
	All 4 are Basic or Foundation	All 4 are Foundation or Promising	All 4 are Promising or Vibrant	All 4 are Vibrant	
What is missing that would help our organisation in moving into the next stage?					
What can we do in the next three years to be at the Vibrant stage?					

MICRO DEEP DIVE

DIMENSION F: EQUITY COMMITTED PARTNERSHIPS



This Dimension F. Evolve equity committed partners and partnerships has two parts 1) Selection of Evaluators and 2) Partnerships between donors, commissioners, evaluators and evaluand.

Instruction for Reflection

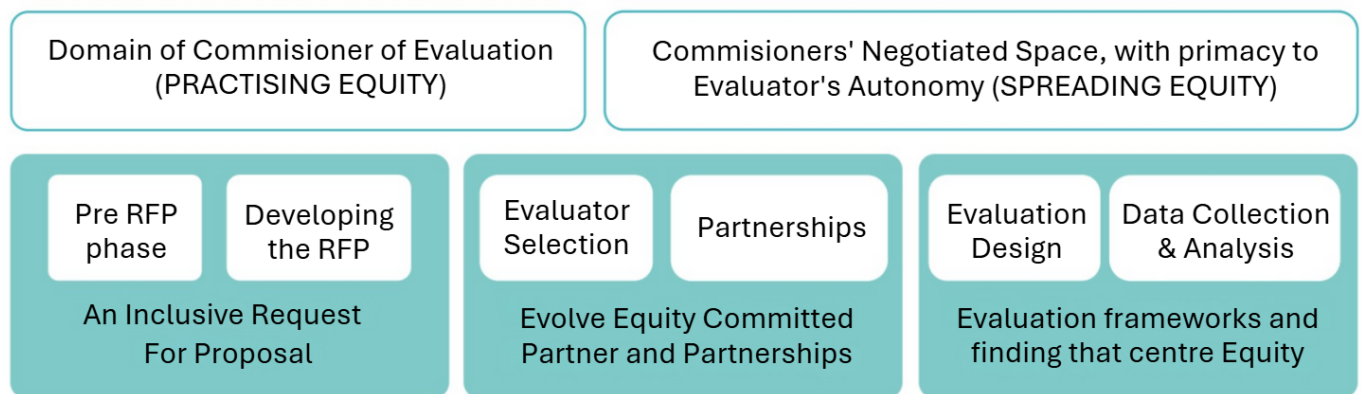
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Dimension F. Equity committed partnerships	Basic	Foundation	Promising	Vibrant	Rationale for selection
Selection of Evaluators F1: Inclusive Outreach: We keep an updated list of equity committed organisations, across regions, locations- who need to be targeted and circulate our RFP widely, including through non-conventional and locally relevant channels, to ensure that local evaluators—particularly those with lived experience and community embeddedness—have a fair opportunity to apply.					
Selection of Evaluators F2: Transparent, ethical and equity-scored review process: Our proposal review criteria, representative selection committee and selection process are made transparent to applicants. Applications are scored explicitly on how they					

Dimension F. Equity committed partnerships	Basic	Foundation	Promising	Vibrant	Rationale for selection
address equity-related principles such as participation, localization, power-sharing, and contextual knowledge. Scoring also includes balance of leadership between GN and GS institutions, compensation disparities, and so on.					
Partnerships F3: Horizontal and dialogical Relationships (foundational principle): We promote partnerships between commissioners, evaluators, and program teams that are horizontal and dialogical, grounded in the co-creation of principles, methods, priorities, and with ways of working that support inclusive and transformative knowledge generation.					
Partnerships F4: Recognition and Valuing of Diverse Knowledges: We believe that all partners, including commissioners, evaluators, and program teams are equally accountable for the evaluation process and outcomes. Roles, responsibilities, and expectations are discussed openly and agreed upon collectively, with mechanisms for shared decision-making and regular feedback.					
	All 4 are Basic or Foundation	All 4 are Foundation or Promising	All 4 are Promising or Vibrant	All 4 are Vibrant	
What is missing that would help our organisation in moving into the next stage?					
What can we do in the next three years to be at the Vibrant stage?					

MICRO DEEP DIVE

DIMENSION G: EVALUATION FRAMEWORKS AND FINDINGS THAT CENTER EQUITY



This Dimension G: Evaluation Frameworks and Findings that Center Equity has two parts 1) Evaluation design and 2) Data Collection and Analysis.

Instruction for Reflection

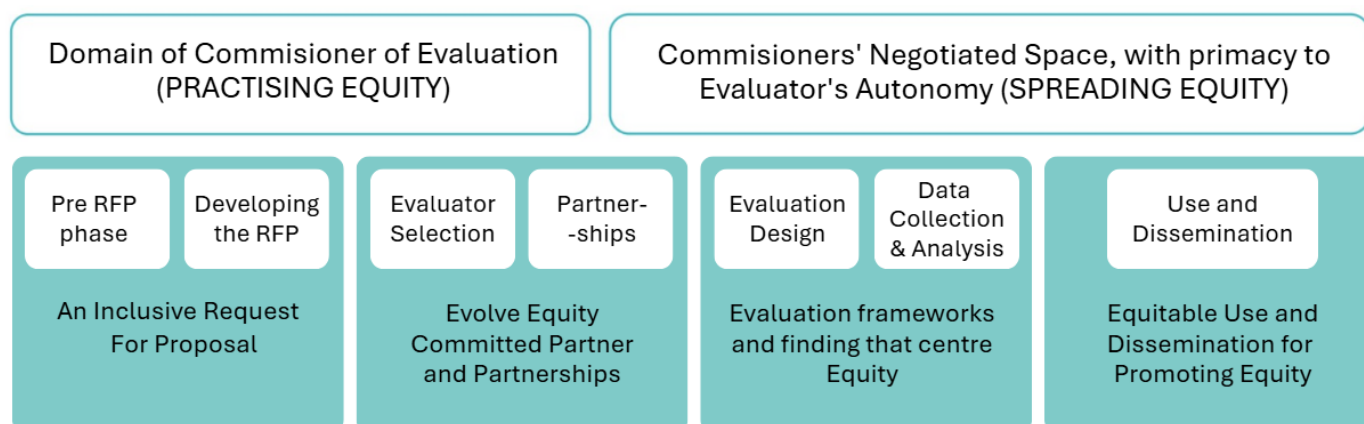
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Dimension G. Evaluation Frameworks and Findings that Center Equity	Basic	Foundation	Promising	Vibrant	Rationale for selection
Evaluation Design: G1: Purpose beyond measurement: Our evaluation objectives go beyond measuring outcomes or validating predetermined hypotheses. They are shaped to promote downward accountability, learning, and transformative change, and are often developed in relation to a living theory of change. Designs are responsive to needs of evaluand and not imposed externally.					
Evaluation Design: G2: Early and Meaningful Role for Local Actors: We ensure that local evaluators, community actors, and knowledge holders are involved from the earliest stages of evaluation design—not just in data collection—to ensure contextual relevance and shared ownership. We ensure that indicators of success are not limited to standardized metrics. Participatory and Indigenous measures are recognized and used alongside conventional indicators, reflecting community-defined outcomes					
Data Collection and Analysis G3: Inclusive and ethical data collection: Our data collection is led or meaningfully co-led by local evaluators or community actors. It prioritizes ethical, culturally sensitive approaches and minimizes harm, burden, or extraction from participants. Our tools, instruments, and protocols are adapted to reflect					

Dimension G. Evaluation Frameworks and Findings that Center Equity	Basic	Foundation	Promising	Vibrant	Rationale for selection
local languages, worldviews, and ways of knowing. Both qualitative and quantitative methods are used in inclusive and accessible ways.					
Data Collection and Analysis G4: Participatory Analysis and transformative focus: Our data analysis involves joint interpretation with local stakeholders, including community members and evaluands. There is validation of results with the evaluand. Co-authorship and collective sense-making are encouraged to generate contextually valid findings. Analysis measures empowerment and consciousness of people to challenge injustice. Our analysis actively seeks to surface power dynamics, transformative shifts, and resistance to injustice.					
	All 4 are Basic or Foundation	All 4 are Foundation or Promising	All 4 are Promising or Vibrant	All 4 are Vibrant	
What is missing that would help our organisation in moving into the next stage?					
What can we do in the next three years to be at the Vibrant stage?					

MICRO DEEP DIVE

DIMENSION H: DISSEMINATION and USE TO PROMOTE EQUITY



This Dimension H: Equitable Use and Dissemination for Promoting Equity have one sub-dimension which is dissemination and use of evaluation findings.

Instruction for Reflection

For each statement, reflect on which stage your organization is currently in. Place a tick mark under the stage you identify with, and write a brief rationale for your choice. You may define each stage according to your own context. Analyze the rationale and identify what is missing, what might help you move to the next stage and four to five action points for the next stage

Dimension H. Dissemination and Use to Promote Equity	Basic	Foundation	Promising	Vibrant	Rationale for selection
H1: Inclusive accessibility and dissemination: We ensure that evaluation reports and findings are made available in multiple languages and accessible formats. Our reports are disseminated widely—including to communities and individuals who contributed data ensuring transparency and reciprocal knowledge sharing					
H2: Transformative Use across Levels: We promote findings to be actively used to influence both upward change (e.g., donor policies and systems) and downward action (e.g., community-led initiatives and program improvements). Use is intentional and built into the evaluation process.					

Dimension H. Dissemination and Use to Promote Equity	Basic	Foundation	Promising	Vibrant	Rationale for selection
H3: Community follow-up and feedback loops: We ensure that there is intentional follow-up with communities, organizations, or groups who participated in the evaluation, ensuring they are informed of findings and supported in using them to continue advocacy, learning, or change efforts.					
H4: Shared authorship and recognition: We ensure that those who contribute meaningfully to the evaluation—especially local actors, community members, and practitioners—are acknowledged appropriately through co-authorship, visibility, and credit in dissemination products. Authorship reflects diverse voices and challenges extractive practices.					
	All 4 are Basic or Foundation	All 4 are Foundation or Promising	All 4 are Promising or Vibrant	All 4 are Vibrant	
What is missing that would help our organisation in moving into the next stage?					
What can we do in the next three years to be at the Vibrant stage?					

MICRO LEVEL SUMMARY

Now that the sub-dimensions have been reviewed, return to the **Lite Analysis at the dimension level**. Make an overall assessment by reviewing the scoring across sub-dimensions and noting whether any changes or additions are needed.

Dimensions	Basic	Foundation	Promising	Vibrant	Rationale for selection
E: An Inclusive Request for Proposal					
F: Equity Committed Partner and Partnerships					
G: Evaluation frameworks and findings that centre Equity					
H: Use and dissemination for promoting Equity					
	All 4 are Basic or Foundation	All 4 are Foundation or Promising	All 4 are Promising or Vibrant	All 4 are Vibrant	
What is missing that would help our organisation in moving into the next stage?					
What can we do in the next three years to be at the Vibrant stage?					

GOOD PRACTICES FROM OUR FINDINGS

Examples of Inclusive and transparent RFP and commissioning

- Letters of Interest instead of full RFPs to reduce burden on smaller/local firms
- Transparent budgeting and selection based on fit for purpose rather than cost alone enabling smaller /local firms to bid
- Inclusive procurement practices with widely shared ToRs and accessible submission processes
- Extending proposal timelines to support equitable participation
- Selection committee, advisory panels and reference groups involving Global South partners and affected communities
- Q&A webinars to improve applicant understanding of fit and requirements Attention to organizational leadership and community engagement (e.g., board makeup)

Examples of equitable partnerships

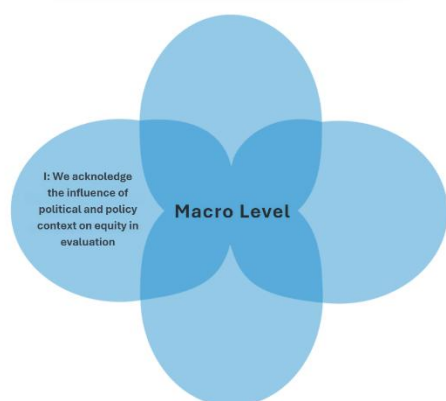
- Relational approaches to evaluation and partnerships
- Feedback loops that engage stakeholders throughout the evaluation cycle

Examples of Equity-centered evaluation design

- Equitable and context-sensitive methodologies, reducing reliance on over- quantification
 - Participatory approaches, even including questions beyond donor objectives to reflect local needs
 - Community-led priority setting, ensuring voices from communities
 - Dissemination of findings to communities to ensure accountability and learning
- 

3. MACRO LEVEL DEEP DIVE

Dimension I: We acknowledge the influence of political, ideological and policy on equity in evaluation



As mentioned above, donors and evaluation commissioners, operate within a national and /regional ideological, political and policy ecosystem that might be conducive to embedding of equity and justice in evaluation, or otherwise. For example, a particular donor could be operating in a situation in which the donor country foreign policy is defined as “feminist”, thus creating a clear opportunity for the equity-centered evaluation of international cooperation programmes. On the contrary, other donors might be operating in a context in which far-right and conservative ideologies prevail, limiting the donors’ capacity to embed equity-centered principles and approaches due to multiple political and policy barriers. In this deep-dive, the objective here is to critically and consciously assess how each donor evaluation team is aware of

their positionality with its barriers and constraints for “using” their own power within its political space in order to promote equity, justice and decolonisation (or otherwise).

At the same time, when exploring this dimension, it’s important to recognise that most donors are “foreign” or “exogenous” actors deploying power in another national and/or regional context. Therefore, this analytical dimension and its sub-dimensions invite tool’s users to explore how they engage with dynamic policy contexts and the strategies, tactics and manoeuvres to promote the centering of equity and justice and evaluation.

Instruction for Reflection

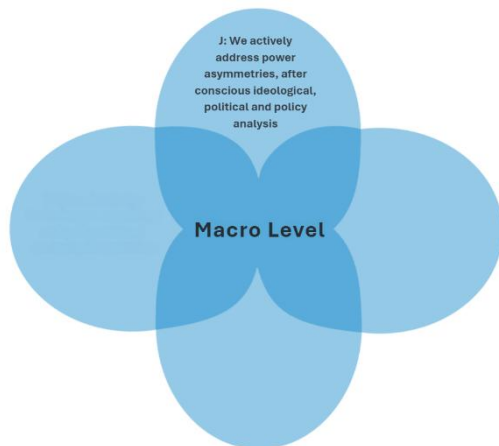
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MACRO DEEP DIVE ANALYSIS

Dimension I: We acknowledge the influence of political, ideological and policy contexts on equity in evaluation	Basic	Foundation	Promising	Vibrant	Rationale for selection
Sub-dimensions Structured context analysis I1. We create structured annual internal context analysis sessions to map out our country's ideological, political and policy landscape and reflect how this might affect our programming and evaluation policies and practices for/against equity.					
Strategic use of influence I2. Considering this analysis, we make explicit decisions on how to use our standing and power to affect political and policy change towards equity in our country and region.					
Context-specific actions I3. Is there something else relevant to your context that you are doing to assess and facilitate ideological, political and policy change in your country as/if necessary?					
What would help our organisation in moving into the next stage?					
What can we do in the next three years to be at the Vibrant stage? (do include 4-5 action points)					

MACRO DEEP DIVE

Dimension J: We actively address power asymmetries, after conscious ideological, and political and policy analysis



This analytical dimension invites donors and commissioners of evaluation to consciously reflect if and how they recognise and proactively look for options to address power differentials between Global North/Minority and Global South/Majority actors, including themselves. By reflecting in historically and contemporary ways in which resources, control over decision-making and opportunities have been concentrated in a minority number of Global North/Majority “affluent” actors and their institutions, donors make decisions on how to re-distribute power and resources, including through their decisions when designing and implementing evaluation. Ideally, this conscious decision starts at the programme design phase and, subsequently, positively impacts evaluation decisions - with the integral project/programme cycle purposely aligned with the

priorities, demands, needs and realities of local actors/ grantees.

In the context of the evolving policy developments supporting the decolonisation and localization of international cooperation agendas, this dimension looks at the level in which donors recognise how colonial legacies are still affecting their own decision-making structures, generating multiple biased resolutions and ways of working. For example, some donors might explicitly be looking at issues of their own pervasive racism expressed in the lack of trust, flexibility and openness when engaging with Global South/Majority countries actors and local constituencies.

Instruction for Reflection

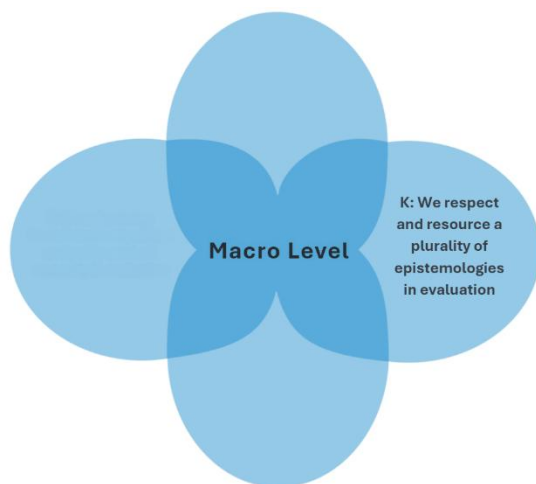
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MACRO DEEP DIVE ANALYSIS

Dimension J: We actively address power asymmetries, after conscious ideological, and political and policy analysis	Basic	Foundation	Promising	Vibrant	Rationale for selection
Sub-dimensions Policy Engagement Strategy J1. We have a plan to engage with our national and regional policy representatives and policy processes with the purpose to promote equity, justice, shift power, decolonization/localization of international cooperation policies and practices, including evaluation					
Influencing and monitoring change J2. We implement and evaluate our own policy influencing plan focusing on affecting change in our own country/region with the purpose to promote equity, decolonisation and localization in international cooperation, including evaluation.					
Context-specific power strategies J3. Is there something else relevant to your context that you are doing to address power asymmetries?					
What would help our organisation in moving into the next stage?					
What can we do in the next three years to be at the Vibrant stage? (do include 4-5 action points)					

MACRO DEEP DIVE

Dimension K: We respect and resource a plurality of epistemologies in evaluation



This analytical dimension invites donors and commissioners of evaluation to reflect on how aware and open they are to recognize the existence of a plurality of epistemologies - this is the deep comprehension and respect to the multiple ways in which humans around the world gain and share knowledge and what different communities and cultures comprehend of what constitutes knowledge and how it is shared between social groups around the world. Donors' openness to diversity in epistemologies means that they practically find ways to open up the space for evaluation to contest, discuss and evolve what is considered to be true. Importantly, this means resourcing for culturally-responsive evaluations undertaken in local languages and by evaluators that can work using the knowledge codes relevant for each specific

community, including indigenous peoples.

Instruction for Reflection

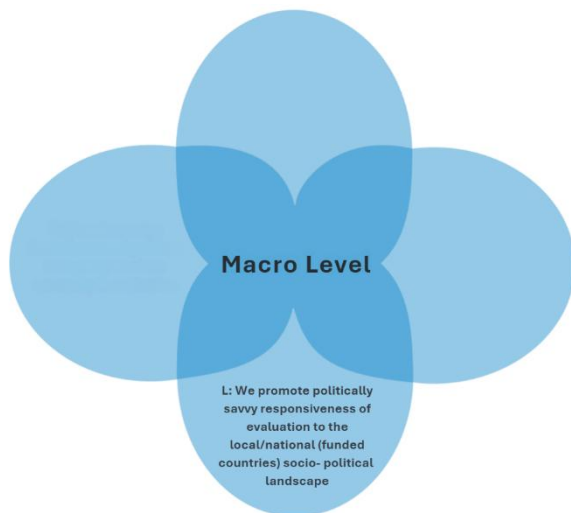
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MACRO DEEP DIVE ANALYSIS

Dimension K. We respect and resource a plurality of epistemologies in evaluation	Basic	Foundation	Promising	Vibrant	Rationale for selection
Sub-dimensions Integrating diverse knowledge systems K1. Having carefully considered ideological, political and policy barriers to equity in our own country, we clearly define options to ensure that plurality of epistemologies is, regardless, integrated in our evaluation policies and practices. We commission evaluations that are inclusive and respectful of this diversity -including indigenous and localized knowledge production modalities.					
Reflecting on epistemic openness K2. We systematically reflect and evaluate with our grantee partners if our evaluation policies and practices were “good enough” in terms of epistemological openness and flexibility, creating opportunities for epistemic justice.					
Context-specific epistemic practices K3. Is there something else relevant to your context that you are doing to address power asymmetries?					
What would help our organisation in moving into the next stage?					
What can we do in the next three years to be at the Vibrant stage?					

MACRO DEEP DIVE

Dimension L: We promote politically savvy responsiveness of evaluation to the local/national (funded countries) socio- political landscape



This analytical dimension invites donors and commissioners of evaluation to critically reflect if they are supporting evaluation processes that are open to criteria and standards that are not just aligned with the “universalised” OECD-DAC principles and standards - as set by a minority group of Northern donors. By recognizing the “preconceived” and “prepackaged” condition of this exogenous and “one size fits all” criteria, donors try to balance it with the inclusion of principles, standards and considerations that are relevant to local constituencies and that might be more useful to value local, national and regional impacts. One could consider that for this openness to exist, donors should have, first and foremost, to critically reflect on point 3 above -epistemological and ethical diversity, thus, deeply comprehending the limitedness of so-called “universal” standards

It also invites donors and commissioners of evaluation to consider if they have intentionally and systematically reviewed their own regulatory frameworks as potential barriers to the inclusion and respect of diverse ways of knowing and the active participation and engagement of local evaluators and communities in the process of data collection, information sharing, co-production of knowledge and other contracting parameters that might promote enough flexibility for Global South/Majority actors to act with sufficient independence, self-sufficiency and agency to ensure evaluations are relevant and transformative for local communities. For example, donors will be open not to include rigid and donor-centric intellectual property clauses in the contracting process that, sometimes, might jeopardize local evaluators and actors to promote grounded accountability and emancipatory process using the information and feedback collected. In this instance, donors will proactively work to adapt their own national regulatory frameworks when possible and ensure that there are available institutional responses to consider the rights and needs of grantees.

Instruction for Reflection

For each statement, reflect on which stage your organization is currently in. Place a tick mark under the stage you identify with, and write a brief rationale for your choice. You may define each stage according to your own context. Analyze the rationale and identify what is missing, what might help you move to the next stage and four to five action points for the next stage.

MACRO DEEP DIVE ANALYSIS

Dimension L: We promote politically savvy responsiveness of evaluation in the local/national (funded countries) socio- political landscape	Basic	Foundation	Promising	Vibrant	Rationale for selection
Sub-dimensions Respecting Local Evaluation Practices L1: We take into consideration and respect local and context-relevant practices for the evaluation of our funded programmes, for example, by including principles and guidance not necessarily always aligned with OECD_DAC standards.					
Navigating civic space with equity L2: We carefully consider the openness and restrictions to “civic space” (in both donor and grantees’ countries), assessing with political savviness how the evaluation processes could be an opportunity for participation, equity and accountability, rather than opting-out of complex settings.					
Context-specific Political Savviness L3: Is there something else that demonstrates your “savviness” to operate in complex own/grantees contexts without disregarding equity-centered policies and practices?					
What would help our organisation in moving into the next stage?					
What can we do in the next three years to be at the Vibrant stage?					

GOOD PRACTICES FROM OUR FINDINGS

Supporting national evaluation professional associations in the Global South

Some donors and commissioners, aware of how top-down and exogenous evaluation policies and practices damage the programmes' impacts- have contributed to strengthening the evaluation field by supporting Voluntary Organizations for Professional Evaluation (VOPEs) in the Global South. This includes funding networks, peer learning platforms, and national associations to promote contextually rooted, locally led evaluation ecosystems. As the equity-centered conversations evolved in recent years -especially in light of localisation and decolonisation efforts- these national evaluations are more proactively developing knowledge and training that aim to center marginalized voices in evaluation policies and practices.

Catalyzing Ground-Up Innovation in Evaluation Approaches

Some donors have actively supported the development and dissemination of alternative evaluation paradigms and methodologies emerging from the Global South. Examples include backing for approaches such as Outcome Mapping, Indigenous evaluation frameworks, feminist evaluation, and other participatory, equity-centered methods. These innovations often originate from grounded practices and reflect local epistemologies. These donors proactively promote these locally-grounded Southern innovations and approaches in global Western-centric spaces as a way to shift power.

Catalyzing Ground-Up Innovation in Evaluation Approaches

By participating in and influencing global evaluation forums and conferences (such as the Global Evaluation Forum, OECD DAC EvalNet, IDEAS, and EvalPartners) as well as diverse multilateral and decolonial/ progressive philanthropy communities, some donors and commissioners have raised critical questions around:

- The relevance and applicability of traditional and mainstream evaluation criteria and approaches, advocating and funding diverse methodologies and approaches that are not necessarily dominated by a few Northern private/consultancy actors.
- The need for transformation-focused and equity-oriented evaluation principles, better linking the evaluation policies and practices with wider global power-shifts efforts, for example, around localization and decolonization. They also actively engage in policy discussions and ensure that equity principles in evaluation are also part of the policy-making agenda.
- Some commissioners question the unfairness of certain power asymmetries in commissioning, evidence use and evaluators' selection, and make efforts to open-up to more accountability-centered and transparent practices. For example, with the creation of diverse Southern-led reference groups linked to evaluation initiatives.

MODULE FOUR INTERNALISED NORMS

This section invites participants to pause and reflect on certain internalized norms that become institutionalized over time in evaluation decisions, examining potential contradiction with stated equity commitments in previous sections.

It is essential to recognise that while individual members may hold different and progressive views, the final decisions related to evaluations, taken by the institution, **often demonstrate the presence of such internalized norms institutionally.**

Therefore, when reflecting on these statements, consider their presence within the institution rather than focusing solely on individuals participating in this reflection. Honest introspection is crucial. *Be mindful that these statements are often worded negatively, so your response of agreement or disagreement should be conscious of the wording.*

		This internalised norm is present in our organisation		Rationale
	Dimensions	Agree	Disagree (Disagree is equivalent to Vibrant)	
M	Devaluing Lived experience: We tend to believe in formally established and certified skills in evaluation, often overlooking the significant value of lived experience as an attribute.			
N	Undervaluing Theorising capacity of Marginal populations: Though we ensure voices from margins get included in evaluations as one of the many inputs; but do not recognise their capacity to theorise their own experiences.			
O	Partiality in defining Impartiality: We tend to believe that independent evaluation means being independent from the programme, its team and its implementation region's power dynamics, often overlooking the significant influence of broader geopolitical dynamics and of dominant theories.			
P	Community engagement Traded-off: While funding and operationalising evaluations, we tend to believe that prioritising financial and results-based efficiency often requires trading off equity and depth of community engagement.			
Q	Delegitimising local knowledge: We tend to believe that technical excellence is best defined by dominant Global North standards; which can unintentionally delegitimise diverse, local, and Indigenous knowledge systems			

If none of the above are 'Disagree'	BASIC
If 1 or 2 above are 'Disagree'	FOUNDATION
If 3 or 4 above are 'Disagree'	PROMISING
If all 6 above are 'Disagree'	VIBRANT

What would help our organisation in moving into the next stage?

What can we do in the next three years to be at the Vibrant stage?



MODULE FIVE NEXT STEPS

Next Steps for Advancing Equity Through the Equity-Centered Evaluation Assessment Tool

Using this tool meaningfully requires not only a commitment to equity principles, but also an **enabling environment** where the reflections and learnings it generates can lead to action. It is helpful to bring together a group of like-minded individuals within an institution who can reflect on the dimensions of the tool, adapt it to their context, and collectively build ownership over next steps. A dialogical, collegial, transparent, and safe space for these discussions is critical.

If a sufficient number of donors and commissioners engage with the tool, the following **collective** next steps may be considered:

- **Pilot and Adapt:** Test the tool in real- world contexts and share adaptations and learnings with the creators and with one another.
- **Peer Learning Group:** Convene a cohort of early users to share practices, challenges, and successes in applying the tool.
- **Community of Practice:** Create a virtual space or forum where users can post reflections, share resources, and exchange experiences.
- **Dissemination and Dialogue:** Share stories and examples of using the tool through roundtables, panels, and convenings.

Over time, a community of practice among like-minded commissioners and donors can serve as a catalyst for broader transformation helping to shift organisational cultures, influence global evaluation norms, support changes in incentive structures, and systematically document stories of change that can make the case for equity-centred evaluation practice across institutions.

Do Engage with Us!

The tool is best used in teams, alongside strategic planning or evaluation commissioning. **Facilitation** is useful to support discussion, taking deep dives and planning next steps. Discussions related to equity are ideological and can lead to debate, contested beliefs and self- reflection that can be at times difficult. We recommend **mentorship** especially to those engaging with the tool for the first time, either one on one or in small groups throughout the evaluation process.



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