Executive Summary

The Greater Boston Evaluation Network (GBEN) is a non-profit professional association and local affiliate of the American Evaluation Network. The mission of GBEN is to promote excellence, innovation and equity in evaluation among professional and aspiring evaluators, and those who align their work with the discipline of evaluation in Greater Boston. The organization achieves its mission through professional development, resource-sharing and networking around evaluation approaches and best practices.

In early 2020, GBEN created the Diversity, Equity, and Inclusion (DEI) Committee to develop a common definition and vision for equity for the organization and increase the organization’s capacity to engage in diversity, equity, and inclusion, including equitable evaluation. On June 8, 2020, GBEN released a solidarity statement on white supremacy, police brutality and COVID-19 with a list of action steps, including the DEI plan of action, DEI survey, and hiring a DEI consultant.

Between September 2020 and February 2021, XEM Consulting Services, in collaboration with the GBEN leadership team, engaged in DEI visioning and strategic planning. Through a collaborative process with the GBEN leadership and members, recommendations were offered related the following areas: governance, membership engagement, capacity building, and outreach and pathways. Below are the Year 1 action items:

Governance
- Devote time to explore issues related to (in)equity in leadership and DEI committee meetings.
- Develop a framework to evaluate organizational structures, policies, and practices and their alignment to DEI principles.
- Re-examine governance job descriptions with DEI in mind.
- Develop a nomination process that increases equity in leadership and adjust as needed.
- Align overall GBEN strategic plan with DEI strategic plan.

Membership Engagement
- Collect membership data.
- Focus on building community, so that members can get to know each other, build affinity, and collaborate.
- Communicate the importance of volunteer work for the membership of the organization by spotlighting members.
- Develop and implement a strategy to collaborate with affiliates and other entities on programming for members.
- Increase visibility of DEI on the GBEN website.

Capacity Building
- Develop a DEI Community of Practice.
- Develop and implement DEI programming strategy.

Outreach and Pathways
- Develop a more intentional strategy to engage in outreach.
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Introduction
The Greater Boston Evaluation Network (GBEN) is a non-profit professional association and local affiliate of the American Evaluation Network. In 2007, Janet Smith founded The Evaluator’s Roundtable, the precursor to GBEN as an informal group for evaluators, many of whom were sole evaluators at organizations or were consultants who wished to connect regarding challenges in their roles and sought support from others like them.

In 2016, GBEN leaders worked to establish an affiliation with the American Evaluation Network. In 2017, GBEN was recognized as a non-profit organization. Through this process, they developed a governance structure for the organization as well as outlined regular programming, including roundtable discussions and networking opportunities. To date, GBEN currently has 140 dues paying members.

The mission of GBEN is to promote excellence, innovation and equity in evaluation among professional and aspiring evaluators, and those who align their work with the discipline of evaluation in Greater Boston. The organization achieves its mission through professional development, resource-sharing and networking around evaluation approaches and best practices. They value the inclusion of voices from diverse sectors and experience levels.

What distinguishes GBEN from other professional networks is that it is a completely volunteer-run professional organization by evaluators for evaluators. It also seeks to engage evaluators at the beginning of their careers as well as those who are seasoned professionals. Their 2019-2022 strategic goal is that GBEN is a growing and sustainable association that delivers value. Their objectives are: growth, sustainability, and value.

DEI Committee
In early 2020, GBEN created the Diversity, Equity, and Inclusion (DEI) Committee to develop a common definition and vision for equity for the organization and increase the organization’s capacity to engage in diversity, equity, and inclusion, including equitable evaluation. The DEI Committee was led by two co-chairs, Min Ma and Calpurnya Roberts. The DEI committee was formed before the deaths of Ahmaud Arbery, Breonna Taylor, Tony McDade, George Floyd, and other Black individuals, which sparked nationwide protests in support of Black lives and calls to defund the police.

On June 8, 2020, GBEN released a solidarity statement on white supremacy, police brutality and COVID-19 with a list of action steps, including the DEI plan of action, DEI survey, and hiring a DEI consultant. The DEI consultant was to focus on the following areas of influence to support GBEN in DEI visioning and strategy: governance and membership (organizational), programming (organizational), strengthening skills to support an equity lens among GBEN members (individual members), and tackling issues of equity within which members work (community, advocacy, and partnerships).

Data Sources
Document analyses were conducted with GBEN organizational materials as well as affiliate websites. Interviews and focus groups were conducted with the GBEN Advisory Board, Executive Committee, DEI Committee, GBEN members of color, affiliate organizations, and non-members. Focus groups were conducted with DEI committee and governance committee members. Individual interviews were conducted with advisory board members. In total, 19 members of the GBEN leadership were interviewed via focus group and interviews. This includes 6 people who identify as evaluators of color and 2 evaluators who self-identified as LGBTQIA+. Interview protocol included questions related to individuals’ experiences with evaluation, individual capacity for equitable evaluation, experiences with GBEN as a resource and source of support for equity work, and pathways to leadership. In addition, two leaders of color within GBEN also were willing to provide additional insights from what was offered in their focus group sessions.

In addition to the initial interview/focus group session, 7 members of the leadership team who also engaged in a visioning session and SWOT analysis.

One focus group session and individual interviews were conducted with 10 GBEN members to better understand their experiences with GBEN more broadly, as well as a focus on DEI issues and programming, membership engagement, and governance. Two of the GBEN members interviewed identified as people of color and none of them identified as LGBTQ+. All members have attended GBEN events in the past and have varying levels of experience with evaluation as well as diversity, equity, and inclusion.

Non-members, which included individuals of color who engaged in evaluation, AEA affiliate leaders, and community organizations, were asked about pathways to evaluation, opportunities for collaboration, and individual and organizational needs as they relate to equitable evaluation. These individuals were mostly identified by the consultant as people she knew through her professional network, were recommended by colleagues, or were found through affiliate websites and LinkedIn. In some cases, members of the GBEN leadership recommended and assisted the consultant in connecting with individuals and organizations.

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<thead>
<tr>
<th></th>
<th>Number of Individuals Interviewed</th>
<th>Demographic Information</th>
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</thead>
<tbody>
<tr>
<td>GBEN leadership (advisory board, executive committee, DEI committee)</td>
<td>19</td>
<td>6 BIPOC (32%) 2 LGBTQIA+ (11%)</td>
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<tr>
<td>GBEN members</td>
<td>11</td>
<td>2 BIPOC (18%)</td>
</tr>
<tr>
<td>Affiliate Organizations</td>
<td>6 (representing 4 affiliates)</td>
<td>3 BIPOC (50%)</td>
</tr>
<tr>
<td>Non-Members (includes evaluators and organizations)</td>
<td>11</td>
<td>11 BIPOC (100%) 2 LGBTQIA+ (18%)</td>
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Defining Equity
The DEI Committee developed the working definition of equity as follows:

Equity is the condition of fair and just inclusion into a society in which all can participate, prosper, and reach their full potential.

Equity will exist when those who have been most marginalized have equal access to opportunities, power, participation and resources and all have avenues to safe, healthy, productive, and fulfilling lives.

Achieving equity requires restructuring deeply entrenched systems of privilege and oppression that have led to the uneven distribution of benefits and burdens over multiple generations. Society will be stronger when the promise in all of us is actualized.

- With inspiration from: Policy Link, King County Office of Equity and Social Justice

While this statement is clear about equity, the statement does not focus specifically address equity for whom.

Vision for Equity within GBEN and Beyond
The data sources from this section come from organizational documents, a SWOT analysis session with members of the GBEN leadership team, and feedback from GBEN leadership team members. The equity definition will be shared across the organization, so that all members have a common understanding of equity. Equity will then be operationalized and infused throughout GBEN. This includes fairness within its practices and policies. Equity will be sustained by the leadership and members so that there is fairness in how they engage in evaluation. The knowledge produced within the organization would help equip evaluators to conduct equitable evaluation in various settings that they work in.

Their vision for equity within GBEN encompasses structure (governance, membership) and programming, and externally to include the organizations evaluators work in or with and field building -- GBEN wants to see that equity is infused in all aspects of the organizations, not just as standalone programs or activities. One GBEN leader stated about her vision for GBEN as an inclusive organization that infuses equity into its fabric to support membership learning about this topic.

*I want GBEN to be an organization that is welcoming, that anyone anywhere on their journey, is welcome to hop on. It doesn’t exclude anyone. Everyone is starting from a different place. It creates space for people to join in that regard. Also, I want it incorporated into the way we do things and the content is of a high quality.*
GBEN recognizes that DEI language and concepts are constantly evolving and that the organization will need to keep up-to-date to continue to engage in DEI work. GBEN recognizes that work to enhance diversity, equity, and inclusion will take time and commitment to fully integrate DEI into the organization as it endeavors to recognize, welcome, support, and advance the professions of all evaluators regardless of their identities.

**Governance and Membership.**

The leadership would like to see the GBEN membership and leadership is more racially diverse and reflective of the evaluator population. The organizational membership would include evaluators and who might not identify as evaluators, but engage in “evaluative thinking” and evaluator-like work. While the DEI committee would lead equity efforts, the leadership would take ownership of equity work and the DEI committee would also collaborate across the organization on projects that are cross-cutting (e.g., programming).

**Programming.**

GBEN will be seen as an expert on DEI evaluation that other organizations will engage with for advice as well as support memberships for their staff. GBEN will meet their members where they are to support their learning and growth about equity issues; co- and cross-learning about equity will take place within the organization and across other organizations. GBEN will provide learning opportunities to individuals and organizations to help improve pathways to evaluation more broadly, and equitable evaluation, more specifically.

**Field Building.**

GBEN will contribute to making evaluation a more just and equitable field by providing professional development to evaluators and organizations to learn about their own identities as it relates to power, privilege, and oppression. GBEN will provide the tools and resources for evaluators to engage in equitable evaluation. Evaluators will recognize the power dynamics that exist inherently in evaluation processes, understand the problematic nature of appropriation, and approach conducting evaluation in a way that privileges the voices and lived experiences of marginalized and minoritized communities.

**DEI Survey Results**

In June 2020, the DEI Committee disseminated the DEI survey to 324 GBEN members and friends to understand the demographics of evaluators affiliated with GBEN as well as their needs, usage, interest, and capacity pertaining to equitable evaluations. Out of the 324 people the DEI survey was sent to, 170 individuals...
opened the email and 51 participated (45 of them were active GBEN members). Specifically, among GBEN due paying members, 32% (45/140) completed the survey. The results were shared with the membership in August 2020.

**Demographics.**

Nearly 8 in 10 respondents identified as female, 14% as male, and 8% did not respond. No one identified as transgender and non-binary. The majority (81%) identified as heterosexual, 10% as gay/lesbian, 8% as bisexual, 4% as queer, 2% as fluid, and 16% did not respond. Most identified as White (76%) followed by Black/African American (12%), Latinx (2%), Asian (2%), and 8% did not respond.

**Equity in GBEN.**

Respondents overwhelmingly responded “Never” (96%) feeling excluded at GBEN events due to your identity (ex: race/ethnicity/gender/sexual orientation). Approximately 44% respondents think that an equity-focused lens has been infused too little into the content of the roundtables, while 26% believe equity has been adequately infused. It is important to note of the 9 BIPOC GBEN members who completed the survey, 5 responded N/A (I have not attended any roundtable events), one person responded that they have only attended one roundtable event, and one person stated “too little” equity content. Newer members were also more likely to answer N/A as 8 out of 14 GBEN members in their first year gave this response.
In terms of membership capacity to engage in project constituents in productive, meaningful conversations about culture and oppression, 29% of members felt not very prepared, 62% felt somewhat prepared, and 9% felt extremely prepared. Members were asked how prepared they were to manage conflict between project stakeholders and their evaluation team when discussing racism, discrimination, and oppression as part of the evaluation effort, only 4% replied that they were extremely prepared, while 47% stated they were not very prepared, and 49% stated they were somewhat prepared.

**Equity Training.**

In the past three years, participants attended a variety of equity trainings. Attending in-person workshops or online webinars were among the more popular answers, 73% and 35%, respectively. On average, respondents reported using three self-assessment methods when asked, how they have assessed their own cultural awareness or biases, with Reflection, Implicit Bias Test, and Workshops being the most selected. Eight of the 9 BIPOC respondents responded very interested and 1 out of the 9 responded interested.

Engaging community stakeholders and managing conflict on projects involving racism or oppression.

Most respondents felt somewhat prepared (61%) to engage community stakeholders around equity. Only 8% reported feeling not at all prepared. Additionally, participants were asked, how prepared they were to respond to managing conflict when discussing racism, discrimination, and oppression. The largest proportion of respondents indicated feeling somewhat prepared (47%) and 10% responded not at all prepared.

The survey results show that there are areas for improvement within the organization, including increasing the diversity of membership. The prevalence of N/A responses for BIPOC as well as
newer members speaks to the need for more targeted engagement of these groups, especially as it relates to equity-related programming given the interest from the membership to engage in these conversations.

**Analysis of Websites, Focus Groups, and Interviews**

From October 2020 through January 2021, XEM Consulting Services, LLC analyzed organizational data as well as conducted focus groups and interviews with various individuals and groups about equity. This section includes data from GBEN members and non-members. Below is an analysis of the data related to GBEN as well as in the field (affiliates network).

**Greater Boston Evaluation Network.**

**Governance and Membership.** The GBEN governance team consists of the president, vice president, treasurer and clerk. Currently, only one of the members of the governance team is a person of color. The governance team, along with the co-chairs of membership (vacancy), communications, program, and DEI committees comprise the leadership team. This group is a bit more diverse as BIPOC individuals are 38% of the leadership team. The advisory board (20% BIPOC) also plays a leadership role in advising the governance team. Currently, there is no information about them on the website. The organization has struggled with having members of all races run for leadership positions as well as volunteer for the organization. GBEN has been reliant on reaching out to anyone who was willing to step up to volunteer. The most common answer to why individuals did not consider running for leadership positions was the lack of time to commit to the organization.

Most members learn about GBEN through being affiliated with AEA or by word of mouth. No demographic information is currently collected from the membership, though there is some information about the sectors they work in (e.g., public health, education). Most members of GBEN are independent consultants or are the sole evaluator within a smaller organization. Most GBEN member and non-members I interviewed had some formal academic training in evaluation through their master’s or doctoral program. There are opportunities for GBEN to increase access to members who may not have the formal training in evaluation, but who need the technical assistance and support.

The capacity of these senior leaders in GBEN varies as some of the leaders have just started engaging in examining their own identities and privilege within society as well as in evaluation. Other senior leaders have expertise in equitable evaluation, have experience speaking with clients about the need to keep equity at the forefront of evaluation, and have modified tools to better support working with marginalized and minoritized populations. They gained their knowledge and skills in internships and in the workplace where they engaged in evaluation with marginalized and minoritized populations. From these experiences, they have developed their own personal style in being explicit about equity with clients. One person has a set of tools and practices that they have curated over time. There are opportunities for the membership of GBEN as well as the leadership team to learn from these more experienced evaluators who engage in equity.
While the skills and knowledge about equity vary in the leadership team, everyone is open to learning. Some of the leadership team members have sought knowledge on their own by reflecting, reading, and discussing equity issues with others. Recently, the leadership team has more critically examined how racism and bias exist within GBEN structures, processes, policies, and practices. They are working toward being more intentional about interrogating bias, recognizing that they must be vigilant in mitigating bias. They must look at their processes, policies, practices, and structures with an equity lens as bias is inherent in all of these artifacts. The DEI committee has been a space for members to talk about these issues and learn about them in a group setting. Through the focus groups and SWOT analysis, leaders have expressed how they have learned from these conversations as they were ones that the team had not discussed before. They expressed the urgency to continue having these conversations and create change within GBEN so that the leadership could be much more diverse, an inclusive place that all members feel a sense of belonging, and a place to continue to learn and grow together. GBEN has been responsive and nimble to members’ needs from its founding and they see equity as an extension of this responsiveness while some of the leaders are also learning and growing on their own while they lead this process. This also helps them to reflect on what this means for them as they seek expertise to perhaps develop guidelines/a framework to help them as well as prospective speakers to consider equity in operations and speaking engagements.

The leadership team and volunteers within GBEN are “energetic, smart, and dynamic.” They enjoy working together and appreciate each other. The leadership team works well together to achieve organizational goals and is committed to the success of the organization. They work hard on high-quality programs and other deliverables to demonstrate that being a member of GBEN has added benefits. There is a lot of collaboration across the governance group, while committees are starting to collaborate with each other. Communication works in a top-down way. The organization is also starting to collaborate more with institutions of higher education, such as MIT, Boston College, and Northeastern University. They hope to continue collaborating and develop additional partnerships with other institutions.

The organization does not seem to have mechanisms for members to communicate or collaborate with one another. While other organizations have a listserv for members to information share and gather, there is none that exists for GBEN. The listserv is used primarily for disseminating information from the leadership team, such as the newsletter. Members do not take initiative to plan events or meetups on their own. A lot of the work happens in the leadership team as well as the committees and members simply attend the events or programs planned by these teams. The committees are small (less than 10 members per committee) and there is an urgent need for more volunteers to participate in them. GBEN struggles with recruiting volunteers while the leadership and committee chairs take on a bulk of the work and may experience burnout. Members mainly expressed lack of time to engage in volunteering and running for governance positions. It is also important to note that some BIPOC individuals may feel they need more seniority before they seek a governance position.

One challenge discussed is that prior to the pandemic, meetings were held at various Boston sites, which made it more challenging for individuals to travel to who were located outside of
The Boston area. With the pandemic and move to the virtual settings, some members who had not participated in as many in-person events were able to re-engage with GBEN. However, some individuals who had attended the in-person events often have become less involved in the Zoom sessions. Members also discussed wanting to network with others and how challenging it is virtually. GBEN may wish to consider accessibility with both in-person and virtual engagement opportunities after the pandemic as well as more informal networking opportunities virtually. Another challenge some members expressed with social events was that new members may feel intimidated and not know anyone at the events. They suggested targeted outreach to new members so that they could feel more comfortable knowing at least one person at the first event they attend.

**Programming.** Members of GBEN have access to a robust set of regularly scheduled programs, such as roundtables and social events. Due to the COVID-19 pandemic, the programming committee is still in the process of formalizing how social events will work online considering a lot of people are experiencing Zoom fatigue. The programming committee has been focused more on providing roundtables and high-quality programs that meet the professional development needs of the membership. Currently, Kelly Washburn is the only Program Chair and takes on an exorbitant amount of the planning and execution for events.

In the past two years, GBEN has hosted three events that may be considered DEI-related: Racial Equity and Evaluation (05/14/2019), Presentation on Trauma-Informed Data Collection (03/09/2020), and Culturally Responsive Evaluation (CRE): Introduction and Inquiry (11/16/2020). Given that the survey showed that members felt equity was infused “too little” and they could not ascertain due to limited participation in GBEN events, this opens opportunities to engage the membership in more standalone equity-based programs like this as well as infusing equity content throughout the other roundtables and events GBEN plans.

The November 2020 CRE event was the kick-off of a series of CRE roundtables. It garnered a lot of interest from members as there were over 100 registrants and 60+ attendees. It was a co-planned event between Kelly Washburn (Co-Chair of Programming), Calpurnyia Roberts (Co-Chair of DEI), and Tiana Yom (Director of NU-PEL at Northeastern University). Members of the leadership team felt that this collaborative programming process was successful and would like to see this collaboration continue with additional higher education institutions. Given the pandemic and the greater amount of interest in equity in evaluation, there are additional opportunities to collaborate across AEA affiliates.

There are no affinity or caucus groups or meetups other than one independent evaluators meetup in April 2019. Members of the leadership team expressed both interest in hosting TIGs or other affinity groups for networking as well as feelings of being overwhelmed with the additional work required to plan and execute these events.

Some of the programming occurs within the DEI Committee. This committee spearheaded the DEI Survey, facilitating hiring of the DEI consultant, and has planned conversations about equity issues. For instance, the DEI Committee developed a reading list that members completed prior to discussing Critical Race Theory and how it can be used as a framework for conducting
evaluations. Another example is that the leadership through this DEI visioning process is having dialogues and asking questions about what it means to engage in equity in evaluation concretely and what it means to be an anti-racist organization. These conversations would be beneficial for the general membership to participate in and yet, they are currently not a part of these conversations. The leadership team believes that having a framework in place would help guide the work of GBEN as some members are just starting the process of learning about DEI issues. The framework would also help sustain DEI work within the organization.

**Equity Lens among GBEN Members.** GBEN members are open to learning about equity issues, especially focused specifically on evaluation. Some members also expressed interest in exploring their own identities and being able to learn more power and oppression. Most of the GBEN members interviewed were interested in attending GBEN programs and events focused on DEI, but did not have as much experience engaging in equitable evaluation. One member who did have expertise in this area noted this as well, that most of the attendees are newer to evaluation, especially equitable evaluation.

As mentioned from a previous section, the leadership ranges from just starting to interrogate DEI issues to members who are entrenched in social justice work in evaluation. The DEI survey results demonstrate the need and want for more equity content infused within the organization. It seems like there are two themes from the survey results about the equity lens needs, which are 1) tools for self-reflection and self-work as it relates to equity and 2) tools for how to engage and think about equity in evaluation processes. It seems like there should be a suite of workshops and resources to help members develop skills in both areas. While data is not collected on members who share this expertise when they sign up for a GBEN membership, this information would be helpful for knowledge sharing across the organization.

In speaking with one executive director of a community organization, they expressed concern about having worked with evaluators that do not understand nuances related to certain marginalized and minoritized communities. They stated that evaluators have some basic understanding of the Black-White binary, but do not understand the experiences and needs of populations that may be minoritized, but are not Black. For instance, Indigenous, Latine, and Asian American communities. This leads to conflict and adds labor for these organizations to educate the evaluators. Perhaps a basic toolkit also for working with communities from different racial groups, understanding their sociopolitical histories in this country, the different ways they have been oppressed, and contemporary issues would be helpful. Other basic toolkits for about LGBTQIA+, disabled, and homeless populations may be useful for the membership. Collecting areas of expertise for evaluators and identifying them in a publicly available way on the GBEN website could also serve as a resource to community organizations seeking specific expertise on these populations.

**Tackling Issues of Equity within Organizations in Which Our Members Work (community, advocacy, partnerships).** A couple of issues came up when speaking with evaluators working with clients and funders about equity. Some of these clients may not understand equity issues, which makes it difficult for evaluators who are committed to this work because they want to
advocate for collecting data in a different way or presenting different sets of data. The funders primarily want to know whether a program is working and to show effectiveness. An executive director of a community organization also echoed these same thoughts as the evaluators, that funders want specific information, presented in specific ways, which makes it harder on the community organizations themselves as the community organizations also recognize that they are jumping through hoops to “show the work, but what the funders want isn’t actually the work.” It seems like funders are often a barrier to equity without knowing this as they support marginalized and minoritized populations. Similarly, clients and organizations may have missions that serve populations of color and may believe they inherently are engaging in equity work, so they do not recognize the need to engage in equitable evaluation. It seems that outreach to them and sharing knowledge with them as Milwaukee Evaluation! did with their Sankofa Funder’s Briefing event could increase capacity for equity work among funding organizations as well as encourage more evaluators to pursue equitable evaluation.

While funders or clients have been barriers from some evaluators, they have also created opportunities for learning for another evaluator. Social-justice based clients make available professional development opportunities for evaluators to gain knowledge about equity issues. Their grantees are getting similar types of trainings and may be an asset to GBEN as members who can share this expertise with the organization.

In speaking with prospective members as well as community organizations, it seems there is a need for more capacity building among smaller community organizations to develop a “culture of evaluation.” Currently, Project Evident with their Talent Accelerator is providing some of this support to community organizations. The program is structured as cohort-based model for a small group of non-profits to engage in for a 6-month period where they participate in 5-6 week modules to learn about various aspects of the evaluation process. They have coaches to support them through the process of planning and evaluation for a program or initiative. While GBEN does not have the capacity to develop a program similar to this or like those offered by affiliates, it could provide pro bono webinars to community organizations about things to consider when developing programs and what they should evaluate. There are opportunities to conduct outreach to foundations that convene grantees to present this type of workshop to develop evaluative thinking within these organizations and promote GBEN. There are also opportunities to collaborate with Project Evident for a portion of the programming, share information about GBEN, and provide additional support after the Talent Accelerator program is over for cohorts. Another possibility could be to work with evaluation faculty who teach practicum courses to graduate students who can then gain experience working with community organizations on evaluation projects. This can also pose a challenge as projects have to be clearly defined for students, there may not be alignment with students’ interests and organizational needs, students might not have enough time to devote to evaluation projects, and this can be taxing on both the project site as well as faculty supervisors.

Establishing outreach to smaller community organizations could help build the membership base for GBEN as these organizations tend to be social-justice related and have the knowledge to share about equity while they gain knowledge about evaluation through GBEN. It will also
improve pathways to membership from individuals who identify as evaluators to also those who are doing evaluative-type work, but might not identify as evaluators. There have also been some promising partnerships with MIT, Northeastern, and Boston College. GBEN could also start to recruit students at these institutions as well as faculty to join GBEN and build pathways. Good places to start could be career services offices and faculty who each evaluation courses.

One topic came up about capacity building for the membership to discuss how evaluators can advocate for equity during the evaluation process. This topic emerged during a couple of interviews where individuals had to make a case for equity because leaders within an organization felt like it was inherently equitable based on the populations they served. In other cases, the organizations did not see value in equity work. In conversations with individuals that had encountered this issue, one person asked for tools on how to engage in these conversations and another one who had experience having these difficult conversations stated the importance of knowing how to push in a way that does not turn people off, but also is not window dressing. GBEN members expressed interest in having the opportunity to learn more informally from one another; they want to have a space where they could share an evaluation dilemma and others could advise about how they approach this issue.

There is no shortage in ideas for and opportunities to engage in advocacy work, develop partnerships, and field building. Recommendations will be made to improve equity within GBEN that considers these ideas as well as limited human resource capital to plan and execute these initiatives.

AEA Affiliate Network.

Currently, AEA has 34 local affiliates, including GBEN. Twenty-seven of the affiliates have websites with local affiliate content in English. DEI-related data, such as leadership and membership, membership fees and structure, programming, and resources from these websites were analyzed. It seems that all of the affiliate organizations are led by volunteers, though some may have some assistance. There is no evidence of this from the website, but a telephone call confirmed that an affiliate recently hired a consultant to support implementation of DEI work.

Leadership and Membership. It seems that governance may be a challenge for other affiliates as well. Alaska Evaluation Network and Evaluation Network for Missouri River Basin have vacancies for a Treasurer and President-Elect, respectively. Most of the websites do not have pictures of leadership or members and most of the websites that did, had leadership who presented as White. Of note, 5 members of the 11-member leadership team of Atlanta-area Evaluation Association are BIPOC; the President and Vice President of Baltimore Area Evaluators are BIPOC; 2 of the 5 members of Milwaukee Evaluation! leadership team are BIPOC, including the President; and 5 of the 6 leadership team members of the Southern California Evaluation Association are BIPOC. Most of the websites did not have public directories. For the affiliates that did, their directory entries ranged from 29-265 members with Alaska Evaluation Network having the lowest number of members and Hawai’i-Pacific Evaluation Association having the most members publicly listed on their directory. There was no way to ascertain diversity of the membership from these directory listings. Both Milwaukee Evaluation! and Washington
Evaluators stand out as organizations with equity explicitly written into their organizational documents as well as programs that embody this commitment. Seattle Evaluation Association also has a mission focused on equity.

**Membership Fees and Structure.** At $25 annually for a professional membership, GBEN is at the lower end of the range of $20-$60 that affiliates charge. GBEN’s student membership fees are also at the lower end of the range at $15 annually (range is $10-$25). Some affiliates may also charge for attendance at certain programs, including conferences. In addition to these fee structures, some affiliates also offer an affiliate (Alaska Evaluation Network), organizational for multiple individuals, 2-year, workshop add-on (Evaluation Association of Saint Louis), and academic mentor (Michigan Association for Evaluation) memberships to provide additional cost savings. Indiana Evaluation Association also sets aside scholarship funds to cover memberships for students, AmeriCorps members, and individuals encountering financial hardship.

To offset costs for running the organizations, some of the affiliates offer an option to donate directly to the organization, another reminds that membership fees help to support not only individuals, but also the community as the affiliate is engaged in collaboration with the community on programs, and several organizations provide sponsorship opportunities. One of the affiliates exhibiting strengths in developing sponsorship opportunities is the Indiana Evaluation Association. The Atlanta-area Evaluation Association also announced that they will be making monetary donations to some surplus revenues from membership fees to local social justice-oriented organizations. All their equity-related programming is open to non-members, so that they can increase access to this information for everyone.

**Programming.** A review of the websites shows that many of the organizations themselves have engaged in programming that is related to DEI issues, including cultural humility, structural racism, critiques of capitalism, anti-racism, social justice, racial equity, and culturally responsive evaluation. About 8 of the affiliates have annual conferences with content focused on DEI issues. Several of the affiliates also collaborate with each other on programming, such as conferences and standalone programs. For instance, the recent Atlanta-area Evaluation Association anti-racism panel was a national conversation that was co-sponsored by other affiliates.

In addition to the programs and conferences, some of these affiliates have ongoing programs that improve pathways and strengthen relationships with the community. For instance, the Atlanta-area Evaluation Association has two pro bono programs: The Pro Bono Evaluation Support Program and the Pro Bono Evaluation Capacity Building Series. The Pro Bono Evaluation Support Program pairs up volunteer evaluators with nonprofit organizations to build an appreciation for program evaluation and create practical deliverables that they can use (AeEA, 2020). This program was developed to help early career evaluators gain hands-on skills in evaluation as well as to stay connected to community work. The Pro Bono Evaluation Capacity Building Series is a 5-session course that helps individuals and organizations seeking to build their skill and knowledge in evaluation (AeEA, 2020). Similarly, Washington Evaluators has an Evaluation without Borders Program that also matches evaluators with local community-based
and nonprofit organizations on projects related to program planning, measurement, and evaluation services (Washington Evaluators, 2020). These programs improve equity as well as increases access to affiliate organizations to build capacity in evaluation and evaluation-like work.

As a form of outreach, Washington Evaluators utilizes University Ambassadors as advocates for evaluation as well as ambassadors for the affiliate organization on their college campuses. Washington Evaluators also offers two scholarships for professional development support to improve pathways to evaluation careers to early career professionals, including students. Finally, Washington Evaluators has a mentoring program called “Mentor Minutes,” which is a short-term program that matches more seasoned evaluators with early career evaluators to discuss networking, careers, and technical advice about evaluation.

To get to know members as well as recognize them for their work, several affiliates have sections on their website spotlighting members. Some of them also provide an annual volunteer award to acknowledge the work of a fellow member in contributing to the organization. Some of these member spotlights have highlighted evaluators engaging in equity work, such as Oregon Program Evaluators Network and Washington Evaluators.

**Resources and Toolkits.** Some of the affiliates have robust information on their websites, which include sharing job announcements, RFPs, volunteer opportunities, and resources that are available for public consumption. They seem to be a hub of information. Some also share videos of previous programs and events, such as Atlanta-area Evaluators Association, which has the link to its anti-racism panel and Milwaukee Evaluation!, which has its funder’s briefing and other programs on their YouTube channel as well as their written report on culturally responsive evaluation. Indiana Evaluation Association, Michigan Association for Evaluation, and Ohio Program Evaluators’ Group share checklists, handbooks, and toolkits related to evaluation. This information could be useful for those who are new to engaging in evaluation work. Minnesota Evaluation Association has a section on their website focused on social justice and evaluation that shares findings from their member survey on this topic as well as links on social justice more broadly and in evaluation. Seattle evaluation Association also has a DEI Resources section that focuses more broadly on this topic, but also has some links on DEI and evaluation.

**Recommendations**

The recommendations offered below were developed based on the data collected from the survey, focus groups, interviews, organizational data, and the collaborative prioritization process with 22 GBEN members. This included the GBEN leadership team along with DEI committee members, membership committee members, and programming committee members. After this prioritization process, recommendations were offered based on four overarching themes: 1) Governance; 2) Cultural shift to one that focuses on connection, collaboration, and capacity building; 3) Increase diversity of membership and outreach; and 4) Establish pathways to evaluation careers and culture. From this, the DEI Committee and Executive Committee members met to provide feedback to prioritize these recommendations into action steps.
focused under the following categories: 1) Governance; 2) Membership Engagement; 3) Capacity Building; and 4) Outreach and Pathways. The most immediate action steps for GBEN are to work on governance issues with some focus on membership engagement.

**Governance**

1. **Devote time to explore issues related to (in)equity in leadership and DEI committee meetings** before facilitating for the rest of the membership. It is important to create a space in meetings to discuss how they can engage in DEI and interrogate bias, beyond simply acknowledging DEI issues. Time spent in these meetings can be devoted to taking a stand on issues in the field of evaluation, addressing what equity means and for whom within the organization, strategizing how to increase racial/ethnic diversity and representation among GBEN members, discussing how to mitigate bias within the organization, and designing an equitable nominations process and outreach plan.

   Length of time estimated to complete this project: ongoing process
   Involvement: Pilot with Governance and DEI Committee and then roll out to general membership

2. **Develop a framework to evaluate organizational structures, policies, and practices and their alignment to DEI principles** (e.g., roundtable presentations include equity content). GBEN should be explicit about racial equity and for what other populations it wishes the organization to better serve. It may take 6-9 months to develop this framework along with protocols, such as an equity impact statement where there is a cover sheet completed for every change or action or boxes that are checked off related to impact, (un)intended consequences, budget implications, and policy implications. Principles or values could be developed, modified from another source, and adopted using membership feedback and involvement to discuss how they see themselves and work, both within GBEN and beyond how they operate as an organization. These tools
can help keep the organization accountable. For an example, see the LouEval Racial Equity Tool Matan BenYishay shared and Washington Evaluators Embodying Antiracism Principles and Practices in Evaluation.

Length of time estimated to complete this project: 6-9 months
Involvement: Governance leadership with membership involvement

3. **Re-examine governance job descriptions with DEI in mind.** This includes explicitly mentioning DEI in each of the four governance position descriptions as all four leaders should be responsible for DEI. Governance should continue to examine policies, practices, and processes within GBEN where inequities and inconsistencies may exist, lead change management, and communicate changes to GBEN committees and membership as appropriate and equitable. There should be clarity around time commitment, governance structure, and possibility of redistributing work if hours are not equitable. GBEN should examine alternate ways of working in a more distributed, shared responsibility and possibly examine other structures to more equitably distribute workload (e.g., Past-President, President, and President-Elect structure). Through the prioritization process, some members suggested having an emerging professional (e.g., student of color) on the GBEN leadership team and provide financial support to attend professional development (e.g., AEA conference). Increasing visibility of emerging professionals on the Governance team could help with increasing student participation in GBEN as well as signal that leadership at all levels is possible for professionals of all experiences.

Length of time estimated to complete this project: Should be completed in the first 3 months and revisited in years 2 and 3.
Involvement: Governance leadership

4. **Develop a nomination process that increases equity in leadership and adjust as needed.** This process should be timely and completed after the job descriptions are revised given that GBEN will be electing a new president in fall 2021 for 2022. It should allow for both self-nominations as well as the nomination of others. Roles and responsibilities for leadership positions should be re-examined and clarified, so that expectations and time commitment are clear. In addition, committee needs should be explicit, including goals, activities, and how equity shows up in the work. The process should be transparent in how members of the leadership reach out to members regarding opportunities, providing a clear pathway to volunteer and leadership opportunities, and encouraging members to become involved in GBEN, especially those from marginalized and minoritized backgrounds.

Length of time estimated to complete this project: 6 months, with periodic revisiting
Involvement: Governance leadership
5. **Align overall GBEN strategic plan with DEI strategic plan.** It is critical to ensure that DEI is not a separate activity and that it is integrated and present the organizational strategic plan. This is something GBEN should do after they develop the DEI framework and protocols. GBEN should also align its budget with DEI priorities as it is an integral component of the strategic plan. Governance will take the leadership in delegating tasks and recommendations from this DEI strategic plan to various committees to implement.

Length of time estimated to complete this project: 6-9 months, but ongoing to track progress
Involvement: Governance leadership with delegation to committees to implement

**Membership Engagement**

![](chart.png)

1. **Collect membership data** to better understand the membership and establish an expectation that members participate in committee work. Information to be collected could include: demographic information, populations they work with (including racial/ethnic groups), areas of expertise/focus areas/”ask me about..”, job title, organization and other affiliations (e.g., She+ Geeks out, colleges, etc.), years of practice and experience level, role (e.g., student, internal, university consultant), and contact information, GBEN committees to be a member/volunteer of, years in field, and a checklist for willingness to be contacted by other members, willingness to share work at an event etc.

Length of time estimated to complete this project: 3 months, with periodic revisiting
Involvement: Membership committee

2. **Focus on building community, so that members can get to know each other, build affinity, and collaborate.** The pandemic has limited the opportunities for members to
meet at monthly socials, so GBEN should consider social programming to engage members virtually, such as http://gather.town or Zoom. It should continue to offer both virtual and in-person engagement opportunities for the membership after the pandemic is over. In offering virtual sessions, GBEN should try to open sessions 15-30 minutes before actual programs and advertise this to the membership so that they can engage in informal networking with guided questions in breakouts. GBEN could also integrate networking within roundtable breakout discussions or host standalone networking programs. GBEN should endeavor to create affinity and caucus meetups to connect with one another. A designated volunteer could plan these meetups based on their membership within them. In addition, there should meetups for new members to orient them to GBEN and programs. Implement Mentor Minute (Washington Evaluators) for newer members to speak with a more seasoned evaluator, network, and possibly collaborate. Through these meetups, social events, and mentoring program, members within the organization will feel more of a sense of connection to the organization given their various engagements with GBEN.

Length of time estimated to implement this project: 3 months
Involvement: Programming and/or Membership committee
Estimated cost: Dependent on cost of licenses and accounts (e.g., Gather.town, Zoom, etc.)

3. Communicate the importance of volunteer work for the membership of the organization by spotlighting members. GBEN should implement a volunteer of the year award to recognize a GBEN member who is devoted to service within the organization. It should also create a section of the website to spotlight members with information about themselves, their work, and their commitment to equity in evaluation. This spotlight will hopefully increase diversity on the website and visibility for equity work in GBEN. The spotlight and volunteer of the year award can be implemented around the time the DEI Framework is completed.

Length of time estimated to complete this project: 3-6 months
Involvement: Programming and/or Membership committee
Estimated cost: Dependent on cost of awards

4. Develop and implement a strategy to collaborate with affiliates and other entities on programming for members. After GBEN completes the DEI framework and protocols, it will be ready to develop a strategy to collaborate with others who may be doing similar work. For instance, several affiliate organizations currently engage in anti-racism and culturally responsive evaluation programming, so it would be beneficial to collaborate with them. This would allow GBEN members to network across organizations and broaden their learning about DEI issues. It would also allow the committees engaged in planning these events to lighten their workload as it will be distributed across affiliates. GBEN may wish to collaborate with these affiliates and possibly host a New England
conference on DEI issues. A possible speaker could be Dr. Bianca Montrosse-Moorehead.

Length of time estimated to develop and implement this project: 6 months
Involvement: Programming committee
Estimated cost: Dependent on cost of honoraria for programming

5. **Increase visibility of DEI on the GBEN website.** The GBEN website lacks diversity in images as well as content. Updating the website on an ongoing basis will help to better connect the organization’s commitment to DEI with artifacts. GBEN can create a DEI subsection to the website and while other committees currently do not have subsections, it may be helpful to add this as well. Adding more information about each committee will help the general membership to learn more about the work each of these communities is engaging in. DEI content could fall under three separate categories: resources for self-learning about DEI broadly; application of DEI to evaluation with specific toolkits; and a directory of DEI evaluators. In addition, GBEN may wish to include content that may be helpful for community organizations to learn more about evaluation. In the long-term, GBEN can work to curate or develop its own resources with content, such as: DEI vocabulary, assessing implicit bias, examining one’s own privilege, understanding the problematic nature of appropriation, recognizing and responding to microaggressions, white supremacy culture, history of race and racism in Boston, overview of Native, Black, Latine, and Asian communities in Boston, what you need to know about LGBTQIA+, disabled, and homeless populations, etc., more broadly, and communicating to members about the GBEN DEI framework; incorporating equity into evaluations; including constituents in every part of the evaluation process; convincing management/funders to invest in equitable evaluation; managing conflict when discussing racism, discrimination, and oppression; using an asset-based approach in evaluation; explicitly addressing systemic oppression in evaluation; the importance of disaggregating data, tutorial on how to modify tools for marginalized and minoritized communities with examples of surveys and other tools shared, etc., more specifically.

Length of time estimated to complete this project: ongoing, but about 3 months to develop strategy and 12+ months to curate materials.
Involvement: Governance will delegate tasks to committees
Estimated cost: Dependent on cost of resource materials (e.g., access to journals)

**Capacity Building**
1. **Develop a DEI Community of Practice.** GBEN will be able to use the DEI framework that Governance develops in order to develop and implement capacity building strategies. GBEN started as an organization that hosted informal brown bag discussions where members brought problems of practice to discuss with others and provide feedback. GBEN should revisit brown bag discussions to discuss DEI-related problems of practice and possibly including journal club discussions on JEDI issues (e.g., *American Journal of Evaluation* and *New Directions in Evaluation*). To improve cross-pollination of ideas and sharing of resources, GBEN should examine the possibility of using a listserv or Slack where members of the community of practice can ask DEI questions of each other and provide advice freely. Several individuals interviewed had mentioned the Nonprofit Consultants Network listserv, whose members are quite active in sharing resources and asking how others may respond to certain dilemmas of practice.

Length of time estimated to develop and implement this project: 3 months  
Involvement: Programming committee  
Estimated cost: Dependent on access to resource materials (e.g., journals) and cost of platforms (e.g., listserv)

2. **Develop and implement DEI programming strategy.** While the Programming committee will be implementing ongoing DEI programs, the Programming committee should devise a strategy for how to engage in DEI programming. They should consider infusing all programs with equity content as well as standalone programs for the GBEN membership to capacity build. What aspects of DEI are needed by the membership? How can GBEN meet the personal and professional DEI needs of members? These are a couple of questions for the Programming committee to consider as they also use the DEI framework to develop their programming strategy for the membership.

Length of time estimated to develop and implement this project: 3-6 months to develop strategy and implement with ongoing programming  
Involvement: Programming committee  
Estimated cost: Dependent on cost of programs
3. **Engage paid support.** GBEN has a limited number of volunteers to support the entire organization’s needs. GBEN should consider engaging paid support to help with DEI capacity building for the membership as well as communications and outreach. GBEN should consider the Federal Work-Study Program, AEA Graduate Education diversity Internship (GEDI), about the Annie E. Casey Foundation Leaders in Equitable Evaluation and Diversity (LEEAD), and a sabbatical fellow whose expertise is in DEI and evaluation to support the leadership team. More information about the former programs can be found in the next section under pathways. Sabbatical Fellows are usually tenure-track or tenured professors who may only need partial funding from the sponsoring organization as they receive partial funds from their home institution. These paid supports could implement some of these DEI recommendations, such as build content library/resources as well as facilitate some programs. A foundation may be able to support the hiring of these fellows or interns. GBEN should explore the possibility of engaging paid support in year two and apply for funding so that they could hire them in year 3.

Length of time estimated to complete this project: Dependent on available funds, but sabbatical fellows may be available for a semester or academic year.

Involvement: Governance with collaboration from committees

Estimated cost: varies by program

### Outreach and Pathways

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1. **Develop a more intentional strategy to engage in outreach.** GBEN should consider who they wish to engage and use the DEI framework to look at how to improve diversity and equity of membership as well as increasing DEI in evaluation through funder outreach. It should consider how to diversify membership by thinking of individuals who may work in adjacent fields, may not consider themselves evaluators/who engage in “evaluation-like work,” BIPOC students, and other populations for whom it would like to increase membership diversity (e.g., LGBTQ+ evaluators, evaluators with disabilities, etc.). It should also consider what organizations to partner with as well as planning for pathways to careers in evaluation and membership. For the membership recruitment strategy, GBEN should think about the following:
Engagement of community organizations, high schools, colleges, and universities (institutional reps), funders (to advocate for equitable evaluation, to present to grantees at meetings about GBEN, and perhaps work with funders/ foundations to sponsor grantee memberships to GBEN). Career services offices at colleges can advertise GBEN to students and alumni through their newsletter, Facebook groups, and LinkedIn to improve pathways to evaluation. GBEN should consider conducting outreach to funders/ foundations to support capacity building for equitable evaluation and community outreach, thereby making it easier for evaluators to generally engage in this work. GBEN can attend community events and present at conferences to raise awareness about GBEN (e.g., Massachusetts Nonprofit Network annual conference, She+ Geeks Out), but also account for potential competition with others. The organization should implement different membership fee structures that would allow for more equitable access by BIPOC students and those working for community organizations (e.g., 2-year memberships, organizational memberships, free memberships/scholarships) as well as improve membership benefits, such as RFP and job postings, communications, volunteer opportunities, evaluation resources for individuals new to evaluation, and member discounts for goods and services. Offer equity programming for free regardless of GBEN membership. GBEN should engage potential sponsors to support GBEN initiatives and programs, thereby reducing membership costs or providing scholarships for those who need financial support to engage in professional development opportunities. It should consider hosting webinars and evaluation clinics.

Length of time estimated to complete this project: Ongoing, though developing a strategy will take about 6 months.
Involvement: Governance leadership with membership committee implementation.
Estimated cost: Varies based on costs of attendance as various conferences and events. There may be additional costs associated with reduced membership fees even if GBEN does not have sponsors.

2. Establish External Partnerships. GBEN should consider collaborating with Project Evident’s Talent Accelerator and/or developing pro bono (Atlanta-area Evaluation Association) / Evaluation without Borders (Washington Evaluators) and/or partnerships with graduate programs in evaluation to provide experience for newer evaluators and support community organizations. This can include curriculum development for organizational participants of the Talent Accelerator or for the organizational participants of the pro bono program if GBEN deems this venture as feasible. This project should take place in year 2 or 3 after the membership recruitment strategy is developed, so there is alignment between this project and the strategy.

Length of time estimated to complete this project: 1-2 years.
Involvement: Governance leadership with significant membership involvement/contribution.
3. **Establish pathways to evaluation in alignment with recruitment strategy.** This can include developing relationships with universities to increase diversity of members from student populations. It could also include creating resources to support practitioners interested in hosting and supporting interns (e.g., job descriptions, hosting an intern 101 materials, mentorship, etc.). Work with colleges and universities to participate in the Federal Work-Study Program (70% by federal government and 30% by GBEN through accounts payable) by hiring FWS interns or free interns (paid through colleges as some career services offices have funds to pay students a stipend for unpaid internships.) to increase racial/ethnic diversity of support for individuals in evaluation. They can help with programming and operational support. Another option is to explore the potential of hiring through the AEA Graduate Education diversity Internship (GEDI), which has shown success in increasing capacity building for culturally responsive evaluation as well promoting pathways to evaluation for marginalized and minoritized graduate students. The GEDI program may not pay PhD candidates equitably for an 8-10 month appointment, so GBEN should consider a better way to compensate GEDI Fellows and provide a longer-term project that is challenging for them. GBEN may also seek to learn more about the Annie E. Casey Foundation Leaders in Equitable Evaluation and Diversity (LEEAD). This program may no longer be in existence. However, it may be helpful to reach out to this foundation to learn more about the program and opportunities for collaboration. Aside from hiring FWS and/or Fellows GBEN can host webinars, such as “what is evaluation?” for undergraduates as well as community organizations as well as host evaluation clinics. This project should take place in year 3 after the membership recruitment strategy is developed, so there is alignment between this project and the strategy.

Length of time estimated to complete this project: 1 year  
Involvement: Governance leadership with membership committee implementation.  
Estimated cost: Varies based on programs offered for pathways as well as cost of support. FWS cost should be less than $10,000 a year for 15 hours of work x 52 weeks a year (with FWS student being paid $25 an hour). Fellows could cost $50,000 a year.

**Conclusion**

Over the course of the past five months, GBEN leadership and members have had the opportunity to engage in ongoing discussions about equity within the organization and evaluation. These conversations, along with programming have already helped to build capacity among the membership to begin to engage in equitable evaluation. The most immediate steps for GBEN is to continue engaging in these critical conversations and develop a DEI framework that centers on equity. GBEN is positioned well to implement the recommendations set forth in this DEI strategic plan to engage the membership, capacity build, and conduct outreach and build pathways.