A SOCIAL EQUITY ASSESSMENT TOOL (SEAT) FOR EVALUATION[1]

KHALIL BITAR

WILLY BRANDT SCHOOL OF PUBLIC POLICY, UNIVERSITY OF ERFURT

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ABSTRACT: *The paper discusses the lack of a methodological tool for equity assessment in the evaluation field. It highlights the historical neglect of equity and social justice in some of the most widely and globally utilized evaluation criteria, including the OECD Development Assistance Committee (DAC) Evaluation Criteria, and its implications for the evaluation field's equity assessment effort. It proposes an intersectional and adaptable tool —with 13 main social equity aspects— which evaluators can utilize to practically and contextually examine equity and social justice issues in various contexts.*

KEYWORDS: evaluation, equity, social justice, assessment, tool, criteria, equity-focused, equitable evaluation.

[1] The SEAT is a work in progress. To contribute to its enhancement, **complete this short form**: https://bit.ly/3rLCSqm.

Introduction

Evaluators —scholars and practitioners alike— have always paid considerable attention to the *importance* of addressing equity and social justice issues in evaluation. Some have long argued for the crucial importance of centering ethics in evaluation and the evaluator's professional and ethical responsibility to address social issues (Scriven, 2016). Others even asserted that evaluation should always advocate for social justice and address the needs and interests of the vulnerable and disadvantaged in particular (House, 1993). While the evaluation field does not have a dedicated social justice approach, multiple prominent evaluation schools of thought and approaches closely examine equity and social justice issues, including Equity-Focused (Bamberger & Segone), Transformative (Mertens), Culturally Responsive (Hood, Hopson, Kirkhart), Indigenous (LaFrance, Cram, Bowman), Feminist (Siegert, Podems, Sielbeck), Empowerment (Fetterman & Wandersman), Participatory (Gujit, Chambers), Collaborative (Rodriguez-Campos), Developmental (Patton), Utilization-Focused (Patton), Blue Marble (Patton), Democratic (MacDonald, Hanberger, Picciotto), and Critical Social Theory Evaluation (Freeman, Mabry). Almost no year passes without a special volume —or several separate articles— is published in some of the most prominent evaluation journals focusing on the importance of social justice and equity in evaluation and how to promote them in the evaluator's work. The 'evaluation jury' is still out on whether evaluators can play an *activist role* or not in their evaluation work (Bitar, 2020). Yet, there is a near consensus concerning evaluation's —and evaluators'— vital role in assessing the evaluand's equity and social justice considerations and results. **Therefore, it is rather remarkable that the field —defined as the "*systematic assessment* of the design, implementation, or results of an initiative for learning or decision-making" (CES, 2015)— lacks the methodological tools needed for equity assessment and evaluation.**

The Methodological Gap

Highlighting the lack of methodological tools for equity assessment in evaluation is not the same as claiming that the evaluation field and its intellectual tradition lacks scientific and innovative approaches to evaluating equity and social justice. On the contrary, outstanding research exists concerning how to consider equity and social justice issues in evaluation. Notably, however, much of this research is about specific types of intervention, country case studies, and some particular aspects of social equity and justice —for example, gender equality or racial justice. What is missing is a *comprehensive, intersectional, and adaptable* tool that can help evaluators *practically and contextually* examine equity and social justice

issues in various types of interventions and multiple contexts. **The lack of such an equity assessment tool in the evaluation field is contributing to the inadequate consideration and examination of equity and social justice issues in evaluation overall, especially in practice**. The field would benefit from such a tool to contribute to enhancing equity and social justice, which is central to its relevance and usefulness.

Equity in Evaluation Criteria

The apparent methodological gap could be understood in light of several potential rationales. Many of these rationales are related to the complex nature of evaluating equity and social justice —ethically, politically, and practically. Evaluation commissioners often prefer to focus on evaluating their interventions exclusively based on their program theory (theory of change or a logic model), i.e., evaluating the intervention strictly based on its objectives as defined in its program theory. Discussing these rationales at length is beyond the scope of this paper. A major rationale in my view, however, on which I focus here, is the tendency to overlook equity —and the importance of *evaluating for equity*— in the traditional evaluation criteria. Consider the widely utilized evaluation criteria of the Development Assistance Committee of the Organisation for Economic Co-operation and Development (OECD-DAC). Relevance, effectiveness, efficiency, impact, and sustainability constitute the criteria since 1991, when it was first laid out as part of the Principles for Evaluation of Development Assistance (OECD-DAC, 1991) and later detailed in the Glossary of Key Terms in Evaluation and Results Based Management (OECD-DAC, 2002). These criteria were initially developed for evaluating international development and humanitarian interventions. However, evaluators and evaluation commissioners use them beyond such domains —especially in public policy evaluation. When the OECD-DAC recently revised its criteria (December 2019), it added *coherence* as a new criterion (OECD-DAC, 2019). It was noteworthy —and disappointing to many— that OECD-DAC did not add an equity criterion after the review process despite the significant increase in attention to equity-related issues in evaluation since the criteria were first developed some 30 years ago. OECD-DAC merely stated that equity issues could be covered under the Relevance and Effectiveness criteria (p. 3). Evaluators were *encouraged* to "examine equity issues for groups that have been marginalized" (p. 9).

The problem with this approach is that it minimizes —even if it does not intend to— the evaluated intervention's social value by merely focusing on evaluating its design, implementation, and results with a generic approach. It is primarily an *intervention-focused rather than a right-holder-focused approach*. The Relevance Criterion focuses on "the extent

to which the intervention objectives and design respond to beneficiaries', global, country, and partner/institution needs, policies, and priorities, and continue to do so if circumstances change" (p. 7). The Effectiveness Criterion examines if the intervention is achieving its objectives, i.e., "the extent to which the intervention achieved, or is expected to achieve, its objectives, and its results, including any differential results across groups" (p. 9). In both these criteria and others, little attention is paid to the wider community of right-holders who were *not targeted* by the intervention, if the intervention is reproducing disadvantages or privileges to certain segments of the community, and how it responds to existing social power dynamics and interactions. In essence, while the OECD-DAC Evaluation Criteria encourages evaluators to examine equity issues and results for groups that have been marginalized, it does not allow for systematic and intersectional consideration of these issues.

The Active Learning Network for Accountability and Performance (ALNAP) adapted the OECD-DAC criteria for evaluating humanitarian action (Beck, 2006). It uses seven rather than five criteria, i.e., relevance/appropriateness, connectedness, coherence, coverage, efficiency, effectiveness, and impact utilizing the OECD-DAC criteria's adaptation for 'evaluation of complex emergencies' (p. 10). Even with the adaptation of the OECD-DAC criteria for evaluating humanitarian interventions, ALNAP does not include an equity criterion. Equity is mentioned only once in the ALNAP criteria guide, particularly in the Coverage Criterion: "Equity questions are central to analysis of coverage. Coverage should consider equity through both geographical analysis and a breakdown of data by relevant socioeconomic categories, such as gender, socioeconomic grouping, ethnicity, age and ability″ (p. 41).

Bamberger & Segone (2011) aptly adapted both the OECD-DAC and ALNAP criteria for equity-focused evaluations. They put forward a set of equity-focused evaluation questions corresponding to all five (original) OECD-DAC criteria, as well as the three additional criteria ALNAP uses for humanitarian interventions (pp. 35–38). These questions —designed to be included in evaluation TORs as suggested by Bamberger and Segone— are often not incorporated by program and evaluation managers. Organizations do not usually include these questions in practice because they grapple with including evaluation questions not directly linked to the OECD-DAC criteria and the intervention's theory of change —often in evaluations that already have limited funds and numerous evaluation questions to prioritize. As Holvoet et al. (2018) show, it is even difficult for organizations to cover some OECD-DAC criteria per se, namely sustainability and impact, due to intervention-related conditions and contexts. The majority of the 40 interventions the authors

studied —of the Belgian development cooperation in Benin, Democratic Republic of the Congo, Rwanda, and Belgium— were found to have satisfactory conditions only to be evaluated based on the effectiveness and efficiency criteria. The authors warn against "commissioning of evaluations that ritually focus on all OECD/DAC criteria regardless of their readiness" (p. 189). However, this practice is prevalent in evaluating international development intervention while often overlooking equity aspects nonetheless.

Evaluators, especially in the Global South, are often bound to accept and utilize the OECD-DAC criteria. Bilateral aid agencies of OECD member countries and many public institutions from non-OECD countries, UN agencies, other multilateral organizations, INGOs, foundations, and local NGOs include '*the Evaluation Criteria*' —i.e., OECD-DAC criteria— in their request for proposals (RFP's) or Terms of reference (TORs) as the principal criteria to evaluate their projects, programs, or policies. Evaluators have to answer the evaluation questions included in these RFPs or TORs, which are frequently exclusively based on the OECD-DAC criteria. An increasing number of organizations have started to include additional cross-cutting —or transversal— criteria related to gender equality, human rights, and equity (see, for example, Peersman, 2014, pp. 3–4 for UNICEF's Evaluative Criteria; DANIDA, 2018, pp. 17–19 for DANIDA's Evaluation Guidelines; USAID, 2011, p. 2 for USAID's Evaluation Policy). Nonetheless, these cross-cutting criteria often significantly differ from one organization to another. They are also not used across all interventions in the same organization. And while most organizations include one or two of them, *many do not,* especially concerning social determinants of equity (Robertson, 2016). Finally, it is noticeable that while several scholars have critiqued the OECD-DAC criteria from different standpoints (see, for example, Chianca, 2008; Eggers, 2009; de la Concha, 2020; Patton, 2020), little research focuses on investigating the criteria's limited consideration of the equity aspects.

The tendency to neglect or even refuse to include equity as an evaluation criterion has recently shifted with the introduction of the Evaluation Criteria for Evaluating Transformation by Michael Quinn Patton. Besides providing a compelling critique of the (revised) DAC criteria —mainly for its business-as-usual approach in an ever-changing world and inadequacy to address major systems transformations— Patton also puts forward six alternative criteria (Patton, 2020). They include:

1. Transformation Fidelity
2. Complex Systems Framing
3. Eco-Efficient Full-Cost Accounting

4. Adaptive Sustainability
5. **Diversity/Equity/Inclusion (DEI)**
6. Interconnectedness Momentum

Incorporating DEI as a key criterion in these already more inclusive evaluation criteria provides a much-needed framework for more serious consideration of DEI issues when designing and conducting evaluations and reporting their findings and recommendations. ***Criteria matter. Including —or excluding— pivotal issues such as equity, inclusion, and diversity in evaluation criteria also matters***. As Patton notes, "criteria direct what questions to ask, data to collect, and results to highlight" among several other rationales he provides about the centrality of criteria to evaluation (p.4). Nonetheless, until such forward-looking criteria are adopted and mainstreamed, the OECD-DAC criteria prevail —without an equity criterion. Additionally, while the DEI's inclusion in the Evaluating Transformation Criteria is a significant positive development, it does not include an *equity evaluation tool*. Even if more evaluation clients and evaluators start employing these criteria, they will need methodological tools to evaluate interventions' equity performance and results covering the intersectionality of social equity and justice aspects.

Equity Aspects

No matter what evaluation criteria we use, we need a comprehensive tool to assess equity more inclusively and critically than the current norm. Examining one or a limited number of the complex and manifold social equity aspects could provide helpful findings for the aspect(s) considered. For example, exploring racial justice aspects is of great importance —and is becoming noticeably more prevalent in recent years. However, suppose these aspects are considered without examining other social equity and justice aspects, such as gender equality, economic empowerment of worst-off groups, and age-related factors. In that case, the overall analysis will be, at best, partial, and that of the racial justice aspects themselves will likely be incomplete and inaccurate.

There are 13 equity aspects identified below to be systematically considered when evaluating an intervention using the SEAT. Several questions are identified for each aspect related to the equitable treatment of relevant community members and right-holders/right holder groups within the broad geographical area the intervention covers and meaningfully involving them in the intervention design and implementation. The SEAT consists of **eight demographic aspects** (geographical, economic, gende, racial and ethnic,

religion, age, sexual orientation, and disability) and **five cross-cutting aspects** (intervention team, evaluator/evaluation team, data collection/analysis/reporting, environmental justice, and unintended consequences).

Considerations before Using the SEAT

'*Equitable treatment*' of people —as used in the SEAT below— means the *fair and impartial treatment of all people without discrimination, bias, or favoritism*. Equity is not the same as equality, though. Hence, **equitably treating people necessitates addressing imbalances** in the existing social systems and people's social, economic, and political realities due to unequal access to opportunity within their social contexts. The objective of equity is not to make everyone have the same social, economic, and political conditions, for it —I believe— is unachievable and perhaps undesirable. Instead, equity aims to decrease and eliminate inequities between people caused by the unfair and unjust treatment of a particular individual(s) or group(s) due to discrimination, bias, or favoritism.

It is imperative to inclusively and methodologically examine *all* equity aspects —or any number of them *based on the intervention context*— when using the SEAT. No aspect should be ignored. Noting '*not applicable*' or '*N/A'* for an aspect because it is not relevant to the context is not the same as not examining it completely. *N/A* implies that the evaluator asserts that this particular aspect does not apply to the intervention's context, which she or he is evaluating, not disregarding it altogether without justification. As Carden (2017) puts it: "Those who want to evaluate for equity and want to understand how to promote a more equitable society need to be concerned about the fine-grained differences that interventions have for different groups in society." (p. 123)

Additionally, **examining cross-cutting aspects, namely environmental justice, unintended consequences, intervention team, evaluator/evaluation team, and evaluation data collection, analysis, and reporting, is as important as accounting for the demographic aspects**. Cross-cutting aspects have a substantial effect on the intervention's equity considerations and results. They are often noticeably overlooked or ignored in evaluations commissioned by many organizations, even when additional transversal criteria are included. Finally, all relevant aspects —depending on the intervention's context— should also be tackled whether the intervention's objectives are directly equity-related or not. **It is even more necessary to use a SEAT when the intervention does not have equity-related objectives.**

SOCIAL EQUITY ASSESSMENT TOOL

Stage #1: Assessing Demographic Aspects

(aspects 1 to 8)

The evaluator(s) using the SEAT should examine each of the focus areas listed here against all eight demographic equity aspects (on the next page) by asking each of the three questions for the corresponding right-holder category.

Focus area #1: To what extent did right-holders *[...fill in here with the corresponding social aspect's right-holder group from the following page, i.e., points 1 to 8]* within the overall geographical unit the intervention covered ***equitably benefit from its activities, outputs, and outcomes***?

Focus area #2: To what extent did the intervention **contribute to decreasing or increasing inequities and inequalities** between right-holders [*...fill in here with the corresponding social aspect's right-holder group from the following page, i.e., points 1 to 8*] within the overall geographical unit it covered —compared to what existed before its implementation?

Focus area #3: To what extent were right-holders [*...fill in here with the corresponding social aspect's right-holder group from the following page, i.e., points 1 to 8*] within the overall geographical unit the intervention covered (especially those who participated in the intervention) **involved in its design and adjustment during the life of the intervention**? To what extent were they equitably and meaningfully involved in these processes?

Demographic social equity aspects:

1. [**Geographical**]...from multiple geographical locations AND area types (e.g., urban, suburban, rural, refugee camp, etc.)
2. [**Economic**]...who are most economically worst-off, vulnerable, and marginalized, compared with others who enjoy better economic conditions
3. [**Gender**]...of different genders (based on their personal self-identification of their gender identity), including women, men, trans, and gender diverse people
4. [**Racial and Ethnic**]...of different racial and ethnic backgrounds
5. [**Religion**]...of different religious beliefs and affiliations
6. [**Age**]...of different age groups, especially children, youth and senior citizens
7. [**Sexual Orientation**]...of different sexual orientations
8. [**Disability**]...identified as persons with disabilities[2], compared with others who do not have such long-term disabilities

[2] "Those who have long-term physical, mental, intellectual or sensory impairments which in interaction with various barriers may hinder their full and effective participation in society on an equal basis with others" (UNGA, p. 4)

Stage #2: Assessing Cross-cutting Aspects

(aspects 9 to 11)

These three cross-cutting aspects focus on the intervention team, evaluator/evaluation team, and the evaluation's data collection/analysis/reporting activities and outputs. For each aspect, the evaluator(s) using the SEAT should collect, analyze, and report relevant data and findings that address whether —and to what extent— elements of the abovementioned demographic equity aspects (aspects 1-8) were considered. For example, was the intervention team diverse, inclusive, and equitable concerning gender and ethnic backgrounds within the community where the intervention was implemented? Similarly, was the data the evaluator(s) have collected representative and inclusive of the different right-holder groups from various geographical locations and areas, age groups, etc.? How? If no, why? What were the limitations and the consequences?

9. **Intervention Team**

   To what extent was the intervention team diverse, inclusive, and equitable concerning relevant demographic equity aspects?

10. **Evaluator/Evaluation Team**

    To what extent was the evaluation team diverse, inclusive, and equitable concerning relevant demographic equity aspects?

11. **Data Collection, Analysis, and Reporting**

    To what extent were the evaluation's data collection, analysis, and reporting activities and outputs diverse, inclusive, and equitable concerning relevant demographic equity aspects?

Stage #3: Assessing Cross-cutting Aspects (aspects 12 and 13)	
This last part focuses on aspects related to the intervention's environmental impact and unintended consequences and whether —and to what extent— the intervention's implementer has monitored them and how they affected right-holders and community overall within the geographical unit the intervention has covered.	
12. Environmental Justice[3] A. To what extent did the intervention monitor its environmental impact[4]? B. To what extent did the intervention's environmental impact affect the environment and biodiversity within the overall geographical unit it covered? C. To what extent did the intervention's environmental impact affect right-holders and community members within the overall geographical unit it covered? Did it affect specific right-holder or right-holder groups more than others?	**13. Unintended Consequences** A. To what extent did the intervention monitor its unintended consequences[5]? B. What positive and negative unintended consequences resulted —or partially resulted— from the intervention? C. To what extent did the intervention's unintended consequences affect right-holders and community members within the overall geographical unit it covered? Did they affect specific right-holder or right-holder groups more than others?

[3] "The fair treatment and meaningful involvement of all people regardless of race, color, national origin, or income with respect to the development, implementation and enforcement of environmental laws, regulations and policies" (US EPA, www.epa.gov/environmentaljustice)
[4] "Any change to the environment, whether adverse or beneficial, resulting from [an intervention's] activities, products, or services"? (US EPA, 2015, p. 2)
[5] "Unforeseen outcomes of efforts to create change in complex social systems"? (Merton, 1936 cited in Leslie, 2019, p. 543)

Way Forward

The newly-established Equitable Evaluation Initiative (EEI) has three main principles, the first of which reads: "evaluation and evaluative work should be in service of equity" (EEI, www.equitableeval.org/framework). Utilizing a multidimensional, contextual, and adaptable SEAT —with consideration of intersectionality— is vital for evaluation and evaluators to methodically evaluate equity and social justice issues in any given intervention, let alone centering equity and social justice issues in evaluation. Without such a tool for evaluating interventions' *equity footprint* for accountability and learning purposes, evaluation commissioners will continue to include equity aspects only partially or not include any of them at all. And evaluators will continue to face numerous significant challenges to systematically and consistently assess social equity and justice.

Evaluation scholars often argue that there is a need to further invest in evaluator education, training, and overall capacity concerning equity and social justice issues (see, for example, Thomas and Madison, 2010; Carden, 2017). Such investment is pivotal given the intricate and challenging nature of conducting equity-focused —or equitable— evaluation (Segone, 2012, pp. 9–11; Bamberger, 2012; Stern, Guckenburg, Persson, & Petrosino, 2019, pp. 4–5). Yet, the reward is valuable. Calling attention to social inequities through evaluation is essential to empowering disadvantaged and marginalized groups and, ultimately, challenging colonial systems and conditions (Robertson, 2016, p. 349; Hopson, 2014, pp. 89–91). As Thomas and Madison put it, these efforts help "enable [evaluators] to challenge existing evaluation hegemonic ontological, epistemological, theoretical, and methodological practices that diminish groups at the margins of society and normalize injustice" (2010, p. 573). Nonetheless, without the appropriate equity criteria and tools —and truly utilizing these tools on the ground— much of our work as evaluators could hamper rather than enhance equity and social justice even with excellent theoretical knowledge, analytical skills, and overall evaluation capacity.

Finally, while I hope that the proposed tool will provide a practical and contextual approach to considering social equity and justice issues in evaluation (with their multifaceted and complex nature), I know that it would benefit from the input and participation of evaluation colleagues from various countries, cultures, experiences, and specializations. Hence, I am reaching out to you for your feedback and suggestions. To contribute to its enhancement, complete this short form: https://bit.ly/3rLCSqm.

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