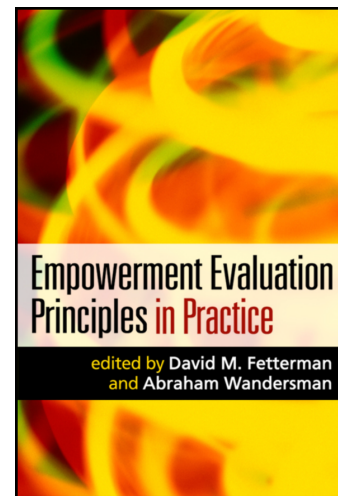
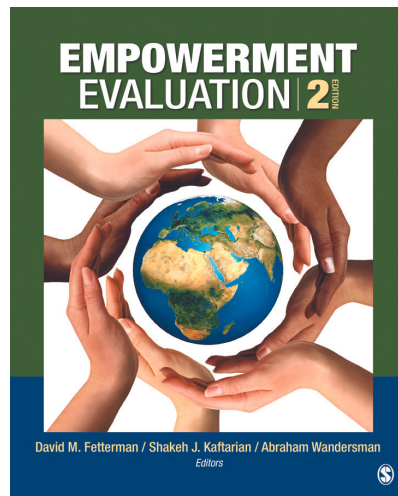
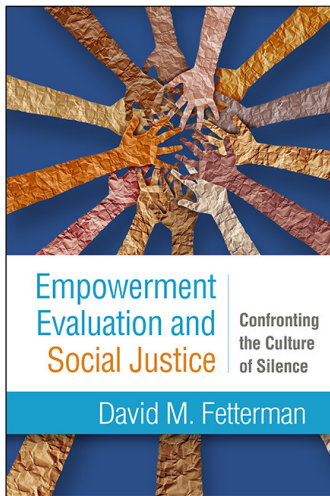


FETTERMAN & ASSOCIATES

EMPOWERMENT EVALUATION PRINCIPLES FIDELITY INDEX



JULY 2026

EMPOWERMENT EVALUATION PRINCIPLES INDEX (EEPI)

INTRODUCTION

A FIDELITY INDEX RECOGNIZES THAT PROGRAMS VARY IN HOW FULLY THEY OPERATIONALIZE EACH PRINCIPLE AND ALLOWS ORGANIZATIONS TO TRACK PROGRESS OVER TIME.

COUPLED WITH A MISSION-TAKING STOCK-PLANNING FOR THE FUTURE FRAMEWORK AND DASHBOARD APPROACH, IT IS BOTH A PRACTICAL SELF-ASSESSMENT TOOL AND A RESEARCH INSTRUMENT FOR EXAMINING THE RELATIONSHIP BETWEEN FIDELITY TO EMPOWERMENT EVALUATION PRINCIPLES AND OUTCOMES SUCH AS EVALUATION CAPACITY, ORGANIZATIONAL LEARNING, AND PROGRAM EFFECTIVENESS.

THIS INSTRUMENT ALSO PROVIDES AN EMPIRICAL FOUNDATION FOR FUTURE STUDIES OF EMPOWERMENT EVALUATION IMPLEMENTATION ACROSS DIVERSE SETTINGS.

INSTRUCTIONS

RATE THE EXTENT TO WHICH EACH STATEMENT DESCRIBES YOUR EVALUATION PROCESS.

SCALE

SCORE

DESCRIPTION

1
STRONGLY DISAGREE

2
DISAGREE

3
SOMEWHAT DISAGREE

4
NEUTRAL

5
SOMEWHAT AGREE

6
AGREE

7
STRONGLY AGREE

PRINCIPLES

IMPROVEMENT

OUR EVALUATION FOCUSES ON CONTINUOUS IMPROVEMENT RATHER THAN MERELY JUDGING SUCCESS OR FAILURE.

THE EVALUATION FINDINGS ARE ROUTINELY USED TO IMPROVE THE PROGRAM.

PARTICIPANTS OPENLY DISCUSS WEAKNESSES WITHOUT FEAR OF PUNISHMENT.

COMMUNITY OWNERSHIP

PROGRAM PARTICIPANTS ACTIVELY MAKE EVALUATION DECISIONS. STAKEHOLDERS DEFINE EVALUATION PRIORITIES.

COMMUNITY MEMBERS FEEL OWNERSHIP OVER BOTH THE PROCESS AND RESULTS.

INCLUSION

ALL RELEVANT STAKEHOLDER GROUPS HAVE MEANINGFUL OPPORTUNITIES TO PARTICIPATE.

DIVERSE VIEWPOINTS ARE ACTIVELY ENCOURAGED.

TRADITIONALLY MARGINALIZED VOICES INFLUENCE EVALUATION DECISIONS.

DEMOCRATIC PARTICIPATION

EVALUATION DECISIONS ARE MADE COLLABORATIVELY.

POWER IS SHARED THROUGHOUT THE EVALUATION PROCESS.

DISAGREEMENTS ARE RESOLVED THROUGH DIALOGUE.

SOCIAL JUSTICE

THE EVALUATION EXPLICITLY ADDRESSES FAIRNESS AND EQUITY.

THE EVALUATION EXAMINES DISPARITIES AMONG POPULATIONS.

RECOMMENDATIONS SEEK TO IMPROVE EQUITABLE OUTCOMES.

PRINCIPLES

COMMUNITY KNOWLEDGE

LOCAL KNOWLEDGE IS CONSIDERED LEGITIMATE EVIDENCE.
PARTICIPANTS' LIVED EXPERIENCES ARE INTEGRATED INTO DECISION MAKING.
COMMUNITY EXPERTISE IS VALUED EQUALLY WITH PROFESSIONAL EXPERTISE.

EVIDENCE-BASED STRATEGIES

PROGRAM DECISIONS ARE INFORMED BY CREDIBLE EVIDENCE.
EVIDENCE IS INTERPRETED JOINTLY WITH STAKEHOLDERS.
DATA ARE REGULARLY REVIEWED TO GUIDE ACTION.

CAPACITY BUILDING

PARTICIPANTS GAIN EVALUATION SKILLS OVER TIME.
THE EVALUATION LEAVES BEHIND SUSTAINABLE EVALUATION CAPACITY.
TRAINING IS AN EXPLICIT COMPONENT OF THE EVALUATION.

ORGANIZATIONAL LEARNING

THE ORGANIZATION REFLECTS ON SUCCESSES AND FAILURES.
EVALUATION RESULTS INFLUENCE ORGANIZATIONAL POLICIES.
LEARNING IS VIEWED AS AN ONGOING PROCESS.

ACCOUNTABILITY

GOALS ARE CLEARLY DEFINED.
PROGRESS IS MONITORED REGULARLY.
STAKEHOLDERS HOLD THEMSELVES ACCOUNTABLE FOR RESULTS.

ADDITIONAL PRINCIPLES & CONCEPTS

CRITICAL FRIEND

THE EVALUATOR PROVIDES CONSTRUCTIVE CHALLENGE WITHOUT TAKING OWNERSHIP AWAY FROM PARTICIPANTS.

THE EVALUATOR BALANCES SUPPORT WITH HONEST FEEDBACK. PARTICIPANTS TRUST THE EVALUATOR WHILE RETAINING DECISION-MAKING AUTHORITY.

SELF-DETERMINATION

PARTICIPANTS INCREASINGLY RELY ON THEIR OWN EVALUATION SKILLS.

THE EVALUATOR INTENTIONALLY REDUCES DEPENDENCE OVER TIME. THE ORGANIZATION CAN SUSTAIN EVALUATION ACTIVITIES INDEPENDENTLY.

SCORING

CALCULATE:

- INDIVIDUAL PRINCIPLE SCORES
- OVERALL MEAN
- RADAR CHART (12 DIMENSIONS)

INTERPRETATION:

MEAN
INTERPRETATION

6.5–7.0
EXCELLENT ADHERENCE

5.5–6.4
STRONG ADHERENCE

4.5–5.4
MODERATE ADHERENCE

3.5–4.4
EMERGING ADHERENCE

BELOW 3.5
NEEDS SUBSTANTIAL IMPROVEMENT

FIDELITY LEVELS

INSTEAD OF A SINGLE SCORE, CLASSIFY IMPLEMENTATION.

LEVEL 1 — TRADITIONAL EVALUATION

EVALUATOR CONTROLS DESIGN, IMPLEMENTATION, AND INTERPRETATION.

LEVEL 2 — COLLABORATIVE EVALUATION

STAKEHOLDERS CONTRIBUTE INFORMATION BUT EVALUATOR RETAINS PRIMARY CONTROL.

LEVEL 3 — PARTICIPATORY EVALUATION SHARED DECISION MAKING AND INCREASED STAKEHOLDER INFLUENCE & CONTROL.

LEVEL 4 — EMPOWERMENT EVALUATION

STAKEHOLDERS DIRECT EVALUATION WITH EVALUATOR SERVING AS A CRITICAL FRIEND.

LEVEL 5 — INSTITUTIONALIZED EMPOWERMENT

EVALUATION IS EMBEDDED INTO ORGANIZATIONAL CULTURE AND ROUTINELY DRIVES SELF-DETERMINED IMPROVEMENT.

ADDITIONAL EVIDENCE

THE RATING SCALE CAN BE SUPPLEMENTED WITH OBJECTIVE EVIDENCE, SUCH AS:

- WRITTEN MISSION STATEMENT DEVELOPED BY STAKEHOLDERS
- TAKING STOCK PRIORITIES IDENTIFIED COLLABORATIVELY
- PLANNING FOR THE FUTURE DOCUMENT
- DASHBOARD WITH GOALS, MILESTONES, AND ACTUAL ACCOMPLISHMENTS
- REGULAR REFLECTION MEETINGS
- EVIDENCE OF STAKEHOLDER-LED DECISION MAKING
- EVALUATION TRAINING ACTIVITIES
- STAKEHOLDER-GENERATED REPORTS
- SUSTAINABILITY PLAN
- DOCUMENTATION SHOWING USE OF FINDINGS

ADDITIONAL NOTES:

PSYCHOMETRIC DEVELOPMENT

THIS INSTRUMENT CAN BE VALIDATED USING STANDARD MEASUREMENT PROCEDURES:

- INTERNAL CONSISTENCY: CRONBACH'S ALPHA OR MCDONALD'S OMEGA FOR EACH PRINCIPLE.
- CONSTRUCT VALIDITY: EXPLORATORY AND CONFIRMATORY FACTOR ANALYSIS TO EXAMINE WHETHER THE PRINCIPLES FORM DISTINCT BUT RELATED DIMENSIONS.
- INTER-RATER RELIABILITY: COMPARE RATINGS ACROSS FACILITATORS, STAKEHOLDERS, AND EXTERNAL OBSERVERS.
- CRITERION VALIDITY: TEST WHETHER HIGHER ADHERENCE PREDICTS OUTCOMES SUCH AS INCREASED EVALUATION CAPACITY, ORGANIZATIONAL LEARNING, PROGRAM IMPROVEMENT, STAKEHOLDER OWNERSHIP, AND SUSTAINABILITY.
- SENSITIVITY TO CHANGE: ADMINISTER AT MULTIPLE POINTS TO ASSESS GROWTH IN EMPOWERMENT OVER TIME.

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