

Exploring Social Justice-Oriented Evaluations

Kat Vang
BILL EMERSON NATIONAL HUNGER FELLOW | 2019

Contents

Acknowledgements	2
Introduction	3
Evaluation Misconceptions	3
Evaluation bias	3
Introduction to Social Justice-Oriented Evaluations	4
Assumptions about Social Justice Oriented Evaluations	5
Evaluator and Participant Relationships in Social Justice Oriented Evaluations	5
Participatory Monitoring and Evaluation (PM&E)	6
What is Participatory Monitoring and Evaluation (PM&E)?	6
Support for Participatory Monitoring and Evaluation (PM&E) Methodologies	6
How is PM&E Different?	6
Benefits	7
Challenges	8
Case Study	8
Exploring Social Justice-Oriented Frameworks	9
1. Empowerment Evaluation (EE)	9
How is EE Different?	9
Case Study	9
2. Transformative Evaluation and Research (TE&R)	10
How is TE&R Different?	10
Case Study	11
3. Culturally Responsive Evaluation (CRE)	11
How is CRE Different?	11
Case Study	11
Conclusion	12
References	13

Acknowledgements

I am grateful for the support of the Congressional Hunger Center as well as for the opportunity to grow and learn as a Bill Emerson National Hunger Fellow. My efforts to further understand the root causes of hunger and poverty as well as learn about effective anti-poverty and anti-hunger strategies have been greatly enhanced by the wisdom, insight and experience of all the incredible people at the Community Food Bank of Southern Arizona in Tucson, AZ. Without the support, guidance and mentorship of Melissa Mundt as well as the thoughtful conversations with Raye Winch, Audra Christophel, Luis Herrera, Marco Lui, Robert Ojeda, Michael McDonald, Rhonda Gonzalez, Kara Jones, the Farm and Garden Team and, especially, the Community Wealth Working Group, I would not have been able to produce this report or my research. I am especially grateful for the insights, opinions and solidarity of my field site partner Roxana Rodriguez who provided tremendous and invaluable support.

“In the midst of chaos, there is also opportunity.”

Sun Tzu

Introduction

Although a useful tool for measurement, evaluations can have many unintended consequences which are harmful to participants and communities: evaluations can unintentionally perpetuate stereotypes, re-enforce unequal power dynamics and completely disengage from social injustice. By examining the role of evaluations in either maintaining or disrupting status quo, this paper attempts to articulate the significance and power that evaluations have to make decisions on behalf of communities, shape lived realities for participants and perpetuate ideas about participant communities. An exploration into the potential of evaluations to support social change efforts and enact social justice, this paper critically examines evaluations and demonstrates how 3 types of social justice-oriented evaluation approaches have repurposed the role, influence and power embedded in evaluations to deepen the participant's role in deciding evaluative outcomes.

Evaluation Misconceptions

Objectivity within evaluations is difficult, if not near impossible, to achieve. Objectivity in evaluations assumes that the evaluator is neutral, meaning that they lack opinions, prejudices and bias and are also able to accurately interpret the participant's response as well as the context from which the participant references. However, evaluators are not objective spectators but are active participants with their own set of beliefs, opinions as well as implicit and explicit biases. Previously assumed to be neutral and objective, evaluations are now understood as being influenced by a wide array of social factors such as culture, history, economics and politics (Kosheleva, 2016).

According to the President of the International Organization for Cooperation in Evaluation, "there is a growing understanding within the professional community that 'the set of profound beliefs that each evaluator holds as his or her worldview about the nature of reality (ontology), the nature of knowledge (epistemology), and the nature of human nature (axiology), is reflected in the approaches he or she chooses to employ in practice – knowingly or unknowingly, consciously or unconsciously" (Kosheleva, 2016).

The vantage point of the evaluator is informed by their position in society as well as their lived experienced which they then use to interpret data (Mertens, 2007). For example, a European evaluator is inclined to frame the indigenous experience according to European norms, culture and sensibilities. Regardless of good intentions, evaluations and evaluators are a kind of information filter which can filter information in a manner that is biased, selective and misleading.

Evaluation bias

The strongest argument against the objectivity and neutrality of evaluations and the evaluative process is the 'evaluation biases' or the ways in which individual bias may occur and embed itself within the evaluative process (cite). Because evaluators are human and therefore prone to bias, whether implicit or not, it is important to transparently acknowledge where bias can occur rather than avoid the topic altogether. By working from a place of transparency, evaluations and evaluators are better poised to accurately understand where areas of misinterpretation, misinformation and misunderstanding can occur and take corrective action. Although bias and subjectivity are inevitable in the evaluative process, they can be mitigated by intentional design, critical reflection and the inclusion of diverse voices.

The following chart highlights common types of evaluation bias:

<i>Type of bias</i>	<i>Definition</i>	<i>Example</i>
<i>Design bias</i>	Bias can occur when a researcher's personal beliefs influence the choice of research question and methodology.	For example, a researcher working for a pharmaceutical company may choose a research question which supports the usefulness of the drug

		being investigated (Smith and Noble, 2)
<i>Selection/participant bias</i>	Bias can occur in the process of recruiting participants and study criteria.	For example, recruitment bias could occur if participants were invited to participate in a survey posted on the internet, which automatically excludes individuals without internet access
<i>Inclusion bias</i>	Bias can occur in what kind of data is included and discarded.	For example, an evaluation of a weight loss program may be affected by participant withdrawal; participants who become disillusioned because of not losing weight may drop out, which may bias the findings towards more favorable results.
<i>Data collection bias/measurement bias</i>	Bias can occur when a researcher's personal beliefs influence the way information or data is collected.	For example, in retrospective studies, for example, when completing questionnaires about eating habits when data collection relies on recall, participants may not remember and report events accurately
	In qualitative research, interviewing is a commonly used method of data collection; how questions are asked will influence the information elicited.	For example, a leading question, "Do you find the health service poor?", is likely to receive a closed yes or no response, and not gain insight into participants experiences and could be replaced with; "Please describe your last visit to hospital?"
	In quantitative studies, measurement bias can occur if a tool or instrument: has not be assessed for its validity or reliability or is not suitable for the specific setting or patient groups.	For example, using a shared decision-making tool that measures patient satisfaction rather than decision-making or using an adult verbal pain assessment tool with young children.
<i>Analysis bias</i>	When analyzing data, the researcher may naturally look for data that confirm their hypotheses or confirm personal experience, overlooking data inconsistent with personal beliefs.	For example, expecting to find a correlation between social media and depression and overlooking the other factors contributing to depression such as home life, social isolation, etc.

Source: Smith and Noble (2014)

Introduction to Social Justice-Oriented Evaluations

Recognizing that evaluations are never objective, neutral or value-free, the International Organization for Cooperation in Evaluation (IOCE)—an evaluator organization linked to UNESCO-- holds the position that the central value for evaluations and evaluators should be equity and social justice (Kosheleva 2016). Defined as an approach to examine "the holistic nature of social problems," social justice-oriented evaluations attempt to use a more democratic process to generate knowledge about social inequities as well as act on this knowledge to advance social change efforts (Thomas and Madison, 2010). Social justice orientation takes the stance that respecting the rights of others and giving legitimacy to lived experience is critical for conducting fair and valid evaluations as well necessary for engaging meaningful impact.

Advocates view social justice as the most important value of evaluations and see evaluations as a method to open up the decision-making process to the public and as a method to integrate the interests of participants into program design (Thomas and Madison, 2010). If evaluations are viewed as a method to enact social justice, “evaluation can contribute to enhancing fair and just distribution of benefits and responsibilities, or to continuing inequality and distorting such distributions” (Thomas and Madison, 2010).

A shared sentiment, several different types of evaluation methodologies have developed to ensure that participant voice is included in a way that results in influencing program outcomes.

This text will focus on 3 social justice-oriented types of participatory monitoring and evaluation (PM&E) methodologies.

1. Empowerment Evaluation
2. Transformative Evaluation and Research
3. Indigenous Evaluation Frameworks

Assumptions about Social Justice Oriented Evaluations

Although an umbrella term that is broadly encompassing of different methods, ‘social justice-oriented’ evaluations are situated within a specific worldview that bears certain assumptions about how the world is organized. Social justice evaluations assume that social injustice occurs and attempts to make that connection explicit (Sirotnik, 1998). Assuming that social justice is the desired outcome, evaluators are asked to commit to championing social justice and to anchor their work in democratic practices, equality, and emancipation (Greene, 2006). If evaluators actively reject the possibility of neutrality in evaluations and embrace that values are embedded within the evaluation process, they can choose to embed values of democracy, equality and emancipation to use evaluations as a tool to further social justice (Thomas and Madison, 2010).

Social justice-oriented evaluations require deliberate planning, intentional engagement, and a willingness to commit to the actions necessary to redress social injustices. As stated by Thomas and Madison in the American Journal of Evaluation, evaluators “must be inspired to challenge the status quo, to care about the interests of the disadvantaged, and to uncover weaknesses within the system that contribute to inequities within society” (2010). Although social justice does not have to be the sole reason for evaluations, integrating social justice issues can create an evaluative practice that can contribute to betterment and social change.

Evaluator and Participant Relationships in Social Justice Oriented Evaluations

In rejecting the possibility of neutrality in evaluative practices, social justice-oriented evaluations acknowledge that the relations between an evaluator and participant are laden with power dynamics. Despite the integration of social justice to promote and advocate for power equality and social equity, social justice-oriented evaluations still adhere to a structure that affords evaluators more influence and a perception as being a more legitimate expert than that of a participant. Until lived experience is entrusted with the same power, validity and legitimacy as “professional expertise,” the relations between an evaluator and participant will remain unequal and the evaluator will continue to be privileged with more power and influence in determining outcomes for the participant. Rather than a concession to structural power inequality, the explicit acknowledgement of privilege and unequal power invites a more meaningful engagement of how social justice should be integrated into evaluations.

The focus on social justice shifts the role of an evaluator from the conventional perception as a “judge of merit or worth to a social change agent” (Thomas and Madison, 2010). In integrating a social justice lens into evaluations, social justice-oriented evaluations hope to better position evaluators to recognize power dynamics, investigate their position in relation to power and deepen their understanding of how to serve and benefit the communities in which they evaluate. Encouraging evaluators to challenge the systems and practices which marginalize groups and normalizes injustice, social justice-oriented evaluations do not guarantee that systems and practices will change. Instead, evaluations illuminate where change can occur and leave the accountability to change in the hands of program managers. Program managers are therefore responsible for acting upon evaluative insight and following through in carrying out the actions necessary to achieve justice for participants.

Participatory Monitoring and Evaluation (PM&E)

Because social justice-oriented evaluation models are founded upon the principles of Participatory Monitoring and Evaluation (PM&E) and utilize PM&E methodologies, the purpose of this section is to provide a broad overview of PM&E to further contextualize social-justice oriented evaluations.

What is Participatory Monitoring and Evaluation (PM&E)?

Participatory monitoring and evaluation (PM&E) is an approach for evaluation that strives “to develop equal partnerships between participants and research/evaluation professionals and to create plans and knowledge that lead to action and positive social change” (Lennie, 2006). Developed around the 1970s and popularized as a method to utilize evaluations as a method for action learning and capacity building, PM&E is commonly used in project and program planning for higher education, preventative drug use programs and community IT projects (Lennie, 2006). A bottom up approach, participatory evaluation consults participants throughout every stage of evaluations: participants co-create the evaluation design, inform the implementation process and assist in interpreting findings and outcomes.

Support for Participatory Monitoring and Evaluation (PM&E) Methodologies

According to Linda Mayoux, a women and politics, human rights and conflict processes researcher and member of the Participation, Inclusion and Social Change Cluster at the institute of Development Studies, arguments in favor of participatory evaluations include (2005):

Rights argument: Participation, particularly the explicit participation of marginalized voices, is a human right and an inherent and indivisible component of development strategies aimed at empowerment.

Relevance argument: Participation of the main stakeholders increases the relevancy between evaluative questions and the realities of peoples’ lives.

Accuracy argument: Participatory methods contribute to a more comprehensive understanding of context by increasing the reliability of information collected and is therefore better positioned to make realistic recommendations.

Effectiveness argument: Involving the main stakeholders in the process of information collection increases awareness of issues as well as prompts ownership and leadership of the evaluation.

Process argument: The participatory evaluation process contributes to empowerment through skill, capacity and network building.

How is PM&E Different?

Despite the methodological credibility of multiple evaluative approaches, the conventional evaluative approach assumes neutrality and objectivity and therefore excludes the power dimensions of race, gender, and class. By failing to acknowledge the influences of race, gender and class on identity and individual experience, conventional evaluative approaches cannot capture the nuances and “range of local views, contextualized meanings and culturally relevant perspectives that are increasingly relevant today, and that participatory and collaborative approaches to evaluations are intended to capture” (Chouniard, 2013).

Although “participation” or the “taking part” in collective action and decision making occurs in both conventional and participatory evaluations—in the sense that participants provide information which therefore informs decisions-- the key difference between the two types of participation exists in the power entrusted to participants.

The following chart highlights some of the key differences between conventional and participatory evaluation:

Conventional Evaluation

Participatory Evaluation

<i>Who</i>	External experts	Community people, project staff, facilitator
<i>What</i>	Predetermined indicators of success, principally cost and production outputs	People identify their own indicators of success (which may include production outputs)
<i>How</i>	Focus on ‘scientific objectivity’ distancing of evaluators from other participants; uniform complex procedures; delayed limited access to results	Self-evaluation, simple methods adapted to local culture; open, immediate sharing of results through local involvement in evaluation processes
<i>When</i>	Usually upon completion; sometimes also mid-term	Merging of monitoring and evaluation; hence frequent small-scale evaluation
<i>Why</i>	Accountability, usually summative, to determine if funding continues	To empower local people to initiate, control and take corrective action

Source: Narayan-Parker 1993

Benefits

Developed as a method for including marginalized voices, PE&M can also facilitate mutual learning, build trust between evaluators and participants as well as prompt critical, intentional and reflective thinking. If utilized to enable participants to take leadership over evaluations, co-create outcomes and influence project designs, PE&M can programs better adapt to community needs, transform community capacity and achieve greater community impact.

Benefits of participatory evaluation include:

Facilitate mutual learning

Through dialogue, reflection and skill sharing, participatory monitoring and evaluation can facilitate mutual learning between evaluators and participants. PE&M can increase the capacity of research teams to be more cognizant of cultural context and, therefore, more effective in engagement strategies; PE&M can make research methodology and knowledge more accessible and can build the capacity of participants to do research (Mertens, 2012).

Builds trust between evaluators and participants

Gaining community trust is critical for engaging effective social change efforts. Participatory evaluations and monitoring can build trust by holding evaluators accountable for following through to address participants’ needs, maintaining program transparency, acknowledging and redressing power differentials and by actively prioritizing and building participant power and influence. (Mertens, 2012).

Prompts critical, intentional and reflective thinking

Intention and reflection are instrumental for designing evaluations and social change efforts that benefit participants in a manner that reflects their expressed needs, desires and agency. The built-in intention setting and feedback devices in participatory evaluation can prompt in both researchers and participants critical, intentional and reflective thinking. (Mertens, 2012).

Increased inclusivity and diversity

Participatory evaluation and monitoring can be more inclusive, equitable and representative of diverse voices if it champions the formation of research teams that include both researchers and participants in equitable positions of influence (Mertens, 2012).

Challenges

As with every evaluation methodology, participatory monitoring and evaluation is not perfect or fail proof. The main critiques of participatory evaluation pertain to the feasibility of its multi-stakeholder approach, its effectiveness in evaluating conflicting agendas and perspectives and its ability to actually empower participants (Lennie, 2006).

Feasibility

The need to ensure diverse stakeholder representatives can complicate the feasibility of participatory evaluation. Participatory evaluation is contingent on participant willingness which may be hard to access or achieve. There are many barriers to accessing participant willingness, such as lack trust and acceptance, and participant relations have to be built and maintained over time. Participatory evaluations require a significant amount of time for assessment, design, implementation and analysis which results in increased evaluation costs (Lennie, 30). Additionally, participatory evaluation requires a certain amount of agility and room for adjustment which can be difficult to anticipate and design for.

Effectiveness strategy: *Using multiple methods for ongoing communication and participation.*

“Both face to-face communication and communication via technologies such as email, phone and conferencing systems are valuable. However, relationships need to be built through face to-face meetings and workshops before technologies can be effectively used for significant evaluation activities (Lennie, 2006).”

Evaluating multi-perspectives

Because participatory evaluations prioritize diverse participant voices, the information gathered may be conflicting and not explicitly cohesive. In addition to the difficulty in identifying relevant stakeholders, diverse stakeholder participants still represent individual needs and may not be representative of group needs. Despite its emphasis on inclusivity and diversity, participatory evaluation may still not achieve a broad diversity of participants in terms of race, gender, class and education.

Effectiveness strategy: *Identifying relevant stakeholders and personally inviting them to participate.*

“Program staff can assist in developing lists of people and organizations that could be invited to participate. Program coordinators, community development officers and community health and education workers with strong networks and long-term relationships with a broad diversity of community groups and key community members can provide particularly useful assistance in identifying key people (Lennie, 2006).”

Assumption of empowerment

Despite its intentions for amplifying disenfranchised voices and capacity building, participatory evaluation does not automatically lead to, or guarantee, empowerment. Participatory evaluations can still perpetuate and/or justify oppressive practices, unequal power dynamics and biases (Lennie, 2006).

Effectiveness strategy: *Utilize participatory evaluations to advance participants to positions of power.*

‘Empowerment’ necessitates the act of ‘giving power;’ therefore, participants need to be given the power to influence programs beyond evaluations. The formation of a participant expert role or participant advisory committees can be a method of insuring that participant voice is legitimized with influential programmatic power.

Case Study

The following scenario is intended to highlight some of the potential limitations and conflicts that may occur in highly specific and close-ended questionnaires.

Scenario 1: Conventional Approach: *A food bank wants to learn about client satisfaction.*

A client visits a food bank and receives a 10-question questionnaire about their satisfaction with the food provided and their experience receiving the food bank's services. The client is given the option of ranking satisfaction from the scale of 1-10, with '1' being the least satisfied and '10' being the most satisfied. The client fills the questionnaire and marks '1' for satisfaction with the food being provided as well as a '10' for their experience receiving services. The client leaves the food bank wondering what to do with the gallon of milk and block of cheese that their lactose-intolerant family can't eat.

Critique: How can the food bank learn about the family's lactose-intolerance as well their satisfaction with the food provided?

The following scenario is intended to give an example of a participatory evaluation approach as well as to highlight how the participatory process can design for participant voice in a way that effectively collects information which can benefit the effectiveness of program impact.

Scenario 2: PM&E Approach: *A food bank wants to learn if its clients' needs are being met*

A food bank designs a listening session to learn more about the needs its clients. A food bank staff asks clients if they'd be willing to tell the food bank more about how the food bank can be more useful and helpful. The client agrees to a conversation; the staff member and client move to a more private part of the room in which the staff guides the conversation with only one question: "how can the food bank help you?"

By having a conversation guided by open-end questions, in which the participant can self-identify needs, the food bank can begin to collect information about its clients' priorities, better understand the clients' needs and refocus efforts to help address those needs.

Critique: Despite the PM&E approach, the food bank may still not be working towards social justice if they are not acting to address the needs of the clients.

Exploring Social Justice-Oriented Frameworks

This following section will provide broad overviews of three different types of evaluation models geared at achieving social justice. Although these frameworks share many similarities, such as data collection strategies, they differ in their addressed audience, explicit goals and approach to social change.

1. Empowerment Evaluation (EE)

Empowerment Evaluation is founded on the idea that "individuals are empowered when they are able to work with others, learn decision-making skills, and manage resources and that empowering organizational processes are those that provide opportunities for shared responsibility and leadership" (Miller & Campbell, 2006). Developed in the early 1990s, EE has been adopted by large institutions such as UNICEF, Center for Disease Control, and the State of Arkansas among many others to promote agency building and self-determination.

How is EE Different?

EE aspires to demystify evaluations by equipping the program staff and community members with the tools and knowledge to plan, self-evaluate and self-monitor their programs and social change efforts. Therefore, program staff and community members should be equipped with the knowledge and skills to assess, design evaluation strategies, implement evaluations as well as analyze and disseminate evaluation findings. Aspiring to institute an "improvement culture," EE attempts to build evaluative capacity into the program culture, so it can be more effective in achieving social justice and self-determination (Fetterman, 1994).

Case Study

When tasked with measuring their progress in carrying out a 5-year plan, the Oakland Unified School District decided upon EE as an evaluation framework. OUSD brought on an EE coach, or an evaluation trainer, to train their staff in evaluation and evaluative thinking. Staff had to determine appropriate goals for evaluation, identify appropriate

performance indicators as well as rate their performance according to those categories as a means to establish baselines for measuring their onward progress. By bringing on an EE coach to train staff in becoming competent evaluators, OUSD invested in building evaluative capacity and simultaneously instituted a culture of evaluations and evaluative thinking.

Fetterman, 1994

2. Transformative Evaluation and Research (TE&R)

Transformative Evaluation and Research, or transformative paradigm, seeks to redress systemic power imbalances and begins first with redressing the relationship between the evaluator and participants. TE&R insists that evaluators must work to facilitate open discussions about social justice issues to understand how these issues affect the programs being evaluated (Thomas and Madison, 2010). TE&R rejects the deficit mentality that blames individuals for social problems and, instead, focuses on how “institutional practices or societal responses to the certain individuals or cultural groups place them at increased risk for negative outcomes” (Thomas and Madison, 2010). In challenging evaluators to be cognizant of social justice issues, evaluators are prompted to rethink and reframe the way social problems are defined as well as questions whether those definitions align with those who are most affected ((Thomas and Madison, 2010).

The following chart is an example of what TE&R can look like in its design, implementation and analysis stages. Sourced from Donna Mertens, a leading evaluator researcher and scholar focused on using evaluations as a way to positively transform and impact participants, this participatory evaluation design is called “Transformative Resilience Mixed Method Design” (Mertens, 2015).

“Transformative Resilience Mixed Method Design”

Stage 1:	Stage 2:	Stage 3:	Stage 4:
<ul style="list-style-type: none"> Establish research team Engage in dialogue with stakeholder groups Establish Local Advisory Committee Read documents; literature review Identify contextual factors 	<ul style="list-style-type: none"> Develop research purpose and questions that reflect transformative principles and variables associate with resilience Conduct preliminary studies to identify risks and assets at multiple levels 	<ul style="list-style-type: none"> Conduct pilot studies: observations, interviews, surveys Develop interventions as appropriate Pretest knowledge, attitudes & skills, as appropriate Begin process evaluation 	<ul style="list-style-type: none"> Post-tests; interviews, surveys, observations Stakeholder involved in analysis, interpretation, reporting and use of findings Dissemination to multiple audiences Monitor use of findings for transformation

Source: Mertens 2015

How is TE&R Different?

TE&R is distinguished by its explicit goal of redressing systemic power imbalances as well as the core questions it organizes around. TE&R is guided by questions such as (Mertens, 2007):

- How is reality defined?
- Whose reality is given privilege?
- What are the social justice implications of accepting of accepting a reality that has not been subjected to a critical analysis on the basis of power differentials?

In asking these questions, TE&R assumes responsibility for evaluator’s role in advancing certain narratives over others and implicates the evaluator as either complicit to social injustice or an ally of social justice. It recognizes that evaluators shape reality, influence the conditions of lived realities and legitimize knowledge about a group of people; therefore, TE&R takes a strong stance for critically examining intentions, actions, consequences and power dynamics (Mertens, 2007). As a method of mitigating and redressing uneven power relations, TE&R advocates for evaluations to adopt a cyclical process of participant feedback and reflection to ensure that evaluations are responding to participant feedback

with accountability (Mertens, 2007). TE&R's strong stance and distinction is intended to prompt the evaluator to become aware of their role in maintaining or disrupting status quo.

Case Study

In Botswana, non-Botswanan researchers were brought on to launch an AIDS awareness campaign which resulted in an intervention strategy that included billboards printed in English. An external evaluator was brought on to evaluate the effectiveness of this campaign and the evaluator found that the English printed billboards were ineffective because the population with the highest rate of infection--young women and girls--were the least likely to be formally educated and, therefore, less likely to be literate or read English. The evaluator also found that there were over 20 languages spoken in Botswana and that the assumption of one universal language was intrinsically flawed. The evaluator considered structural inequities, local context and local knowledge and redesigned the intervention strategy to be most effective for communicating to young women and girls. The revised campaign resulted in leveraging different local languages to promote AIDS awareness through storytelling and public performances.

Mertens, 2007

3. Culturally Responsive Evaluation (CRE)

Culturally Responsive Evaluation (CRE) is an evaluation framework that centers evaluation in culture, meaning "it rejects culture-free evaluation and recognizes that culturally defined values and beliefs lie at the heart of any evaluative effort" (Newcomer et. Al, 2015). Within CRE, 'culture' is defined as "a cumulative body of learned and shared behavior, values, customs and beliefs common to a particular group or society" and 'responsive' is defined as substantively and politically attending to the issues of culture and race in evaluation practices (Newcomer et. Al, 2015). CRE advocates for evaluations to be designed and implemented in a way that responds to context-specificity by integrating cultural norms, beliefs and values. CRE prioritizes historically marginalized groups and seeks to support the equitable representation and influence of marginalized groups in evaluative practices. In situating evaluations through a lens of cultural examination and impact, CRE casts the participants' lived experience, validity and culture as the most important factors in evaluations.

How is CRE Different?

CRE is distinguished from other forms of evaluations by its emphasis on historical, social and geographic context as well as its centering of cultural norms and integration of cultural structures. An approach that explicitly challenges evaluators to educate themselves on the history, relational styles and power structures of the people they are evaluating, CRE is a framework that undermines prescriptive "intervention strategies" and, instead, tries to ensure that "intervention strategies" are consistent with the culture, beliefs and aspirations of participants (Newcomer et. Al, 2015). In CRE, participants determine success indicators and every phase of evaluation design and implementation reflects cultural competence and relevancy. Additionally, CRE has a specific framework for conducting evaluations (Newcomer et. Al, 2015):

1. Prepare for the evaluation
2. Engage stakeholders
3. Identify evaluation purposes
4. Frame the right questions
5. Design the Evaluation
6. Select and adapt instrumentation
7. Collect the data
8. Analyze the data
9. Disseminate and use the results

Case Study

CRE is frequently utilized to engage evaluations with indigenous communities because indigenous communities have their own governance systems and cultural hierarchies of authority. In considering history and location of the participant

culture, CRE recognizes that indigenous cultures have a history of being disempowered and discriminated against by dominant cultures and therefore understands that indigenous communities may feel distrust and skepticism for external agents. Taking this into account, the evaluator takes the responsibility of understanding how indigenous communities feel about external agents as well as strives to understand indigenous cultural norms and structures. The evaluator then applies that knowledge to align program efforts to ensure that programs fit within those cultural norms and structures. A key part of ensuring cultural competency is working closely with tribal officials or leaders and respecting cultural norms. For example, an evaluator may find that oral communication is more effective than written communication, or that meetings occur in a group setting rather than one-on-one or that certain topics are taboo. Rather than viewing these cultural norms and structures as limitations, the evaluator builds around these limitations to achieve more effective and respectful programs.

LaFrance, 2007

Conclusion

Generally speaking, conventional evaluations tend to consult participant voice and opinion for the purpose of gaining something, whether it is input, information, or insight etc. Commonly critiqued for being 'extractive,' or withdrawing something without giving back, conventional evaluations constrict participation by defining when, how, and what participation should be. For example, questionnaires with only close-ended answers such as 'yes,' 'no,' 'sometimes,' limit participant voice by constricting accepted responses and assumes that the questions asked are most relevant and appropriate.

Developed as a response to challenge and redefine the convention of evaluations, Participatory Evaluations and Monitoring (PE&M) 'challenges the hegemony of orthodox evaluation research methods' and therefore offers more opportunity to develop and evaluate long-term strategies for widening participation in education and lifelong learning" (Lennie, 2006). Aspiring to mutually benefit both the evaluator and community member, PE&M allocate more input and influence into hand of participants. Commonly used in project and program planning, monitoring, evaluation and impact assessment, PE&M have significantly contributed to program effectiveness and impact project through leveraging participant voice to inform outcomes and solutions.

Building off PE&M, social justice-oriented evaluations actively includes and involves community members in the evaluation process and emphasizes community empowerment, critical reflection and building relationships of mutual trust between evaluators and participants. Social justice-oriented evaluations take the stance that evaluators "must be inspired to challenge the status quo, to care about the interests of the disadvantaged, and to uncover weaknesses within the system to contribute to inequities within society" (Mertens). Social justice-oriented evaluations "can generate appropriate action, new ideas and long-term visions, foster ongoing change and improvement, and enables regular critical reflection on outcomes (McTaggart 1991) (Lennie, 2006).

Although varying in design, implementation and intention, social justice-oriented evaluations can advocate for the most vulnerable stakeholders—whether directly or indirectly affected by the program or project—by actively including their voice in the decision-making and evaluative process (Mayoux, 2005). By including the most vulnerable stakeholders in the stages of decision-making, evaluation design and data analysis, social justice-oriented evaluations build participant power by leveraging participant voice to inform, influence and determine outcomes (Mayoux, 2005). By casting the participants into active, influential and powerful roles, social justice-oriented evaluations challenge the idea of participants as passive, information providers and instead center participants' lived experience as the most important aspect in evaluations. Although a nuanced power shift, social justice-oriented evaluations reinforce the power, validity and legitimacy of participants and regards those voices as equal, if not more expert, than the evaluators. In elevating the participants' validity as equal to the evaluators, social justice-oriented evaluations mitigate and dismantle uneven power dynamics that are commonly embedded within evaluations.

References

- Bowman, Nicole R, et al. "Culturally Responsive Indigenous Evaluation: A Practical Approach for Evaluating Indigenous Projects in Tribal Reservation Contexts." *Digital Scholarship@UNLV*, 2015, digitalscholarship.unlv.edu/env_occ_health_fac_articles/192/.
- Casillas, Wanda D., and William M. Trochim. "Continuing the Journey to Reposition Culture and Cultural Context in Evaluation Theory and Practice." *IAP // Book // Complexity Leadership*, 2015, www.infoagepub.com/products/Continuing-the-Journey-to-Reposition-Culture-and-Cultural-Context-in-Evaluation-Theory-and-Practice.
- Celsa-Spraggs. "Methodologically Inclusive Transformative Evaluation as an Enabler of PDF Document - DocSlides." *DocSlides*, www.docslides.com/celsa-spraggs/methodologically-inclusive-transformative-evaluation-as-an-e.
- Chounaird, Jill. "The Case for Participatory Evaluation in an Era of Accountability." *Journal of Research in Crime and Delinquency*, 2013, journals.sagepub.com/doi/abs/10.1177/1098214013478142.
- Cornwall, Andrea. "Power & Knowledge - Gaventa and Cornwall." *Academia.edu - Share Research*, 2001, www.academia.edu/2636291/Power_and_Knowledge_-_Gaventa_and_Cornwall.
- Fetterman, David. "Empowerment Evaluation." *Journal of Research in Crime and Delinquency*, 1994, journals.sagepub.com/doi/abs/10.1177/109821409401500101.
- Fetterman, David M. "Empowerment Evaluation: A Form of Self-Evaluation." *Journal of Research in Education*, Eastern Educational Research Association. George Watson, Marshall University, One John Marshall Drive, College of Education and Professional Development, Huntington, WV 25755. e-Mail: Eerajournal@Gmail.com; Web Site: [Http://Www.eeraorganization.org](http://Www.eeraorganization.org), 31 Mar. 1995, eric.ed.gov/?id=ED387517.
- Fetterman, David. "From Policies to Results: Developing Capacities for Country Monitoring and Evaluation Systems." *Combine Qualitative and Quantitative Data | Better Evaluation*, www.betterevaluation.org/ja/node/1604.
- Frierson, Henry T, et al. "Section IV STRATEGIES THAT ADDRESS CULTURALLY RESPONSIVE EVALUATION 7. A GUIDE TO CONDUCTING CULTURALLY RESPONSIVE EVALUATIONS." *CiteSeerX*, citeseerx.ist.psu.edu/viewdoc/summary?doi=10.1.1.133.5459.
- Hopson, Rodney K., et al. "Culturally Responsive Evaluation." *The Canadian Journal of Chemical Engineering*, Wiley-Blackwell, 14 Oct. 2015, onlinelibrary.wiley.com/doi/10.1002/9781119171386.ch12.
- Hughes, Christina. "Qualitative and Quantitative Approaches to Social Research." University of Warwick.
- "Indigenous Approaches to Program Evaluation." *ArtBridges | ArtReach Self Care Toolkit: Caring for Yourself Is a Radical Act*, 2013, artbridges.ca/view_item/learning_resource/325.
- "Integration of Social Justice Into the Teaching of Evaluation." *Journal of Research in Crime and Delinquency*, 2010, journals.sagepub.com/doi/abs/10.1177/1098214010368426.
- LaFrance, Joan, and Richard Nichols. "Reframing Evaluation: Defining an Indigenous Evaluation Framework." *Journal of Research in Education*, Eastern Educational Research Association. George Watson, Marshall University, One John Marshall Drive, College of Education and Professional Development, Huntington, WV 25755. e-Mail: Eerajournal@Gmail.com; Web Site: [Http://Www.eeraorganization.org](http://Www.eeraorganization.org), 30 Nov. 2007, eric.ed.gov/?id=EJ935344.
- Lennie, June. "Increasing the Rigour and Trustworthiness of Participatory Evaluations: Learnings from the Field." *Evaluation Journal of Australasia*, 2006.
- Kosheleva, Natalia. "Methodologically Inclusive Transformative Evaluation as an Enabler of Social Inclusion." *International Organization for Cooperation in Evaluation*, 2016, unesco.org/new/fileadmin/MULTIMEDIA/HQ/SHS/pdf/Workshop-Social-Inclusion_IOCE.pdf
- Mayoux, Linda. "Between Tyranny and Utopia: Participatory Evaluation for pro-Poor Development." *Organisational Learning | Participatory Methods*, 2005, www.participatorymethods.org/resource/between-tyranny-and-utopia-participatory-evaluation-pro-poor-development.
- Mertens, Donna. "Transformative Mixed Methods: Addressing Inequities." *Journal of Research in Crime and Delinquency*, 2012, journals.sagepub.com/doi/abs/10.1177/0002764211433797.

- Mertens, Donna. "Transformative Mixed Methods: Addressing Inequities." *Journal of Research in Crime and Delinquency*, 2012, journals.sagepub.com/doi/abs/10.1177/0002764211433797.
- Narayan-Parker, Deepa. "Participatory Evaluation, Tools for Managing Change in Water and Sanitation." *Organisational Learning | Participatory Methods*, 1993, www.participatorymethods.org/resource/participatory-evaluation-tools-managing-change-water-and-sanitation.
- Newcomer, Kathryn E, et al. "Handbook of Practical Program Evaluation, Fourth." *The Canadian Journal of Chemical Engineering*, Wiley-Blackwell, 2015, onlinelibrary.wiley.com/doi/book/10.1002/9781119171386.
- Miller, Robin Lin, and Rebecca Campbell. "Taking Stock of Empowerment Evaluation: An Empirical Review." *Journal of Research in Crime and Delinquency*, 2006, journals.sagepub.com/doi/10.1177/109821400602700303.
- "Program Evaluation Theory and Practice." *Google Books*, 2012, books.google.com/books/about/Program_Evaluation_Theory_and_Practice.html?id=DUAmbbuWC1oC.
- Sirontik, Kenneth A. "Evaluation and Social Justice: Issues in Public Education." *Journal of Research in Education*, Eastern Educational Research Association. George Watson, Marshall University, One John Marshall Drive, College of Education and Professional Development, Huntington, WV 25755. e-Mail: Eerajournal@Gmail.com; Web Site: Http://Wwww.eeraorganization.org, 30 Nov. 1989, eric.ed.gov/?id=EJ407899.
- Smith, Joanna, and Helen Noble. "Bias in Research." *Evidence-Based Nursing*, Royal College of Nursing, 1 Oct. 2014, ebn.bmj.com/content/17/4/100.
- Tarsilla, Michele. "Inclusiveness and Social Justice in Evaluation: Can the Transformative Agenda Really Alter the Status Quo? A Conversation with Donna M. Mertens." *Journal of Service-Learning in Higher Education*, 2010, journals.sfu.ca/jmde/index.php/jmde_1/article/view/281.
- Thomas, Veronica G, and Anna Madison. "Integration of Social Justice Into the Teaching of Evaluation." *Journal of Research in Crime and Delinquency*, 2010, journals.sagepub.com/doi/abs/10.1177/1098214010368426.
- Wandersman, Abraham, et al. "Empowerment Evaluation: Principles and Action." *Academia.edu - Share Research*, www.academia.edu/16491766/Empowerment_evaluation_Principles_and_action.