

What Does it Take to do Evaluation in Communities and Cultural Contexts Other Than Our Own?

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Background: This paper builds on the growing body of evaluation literature around the importance of culture and cultural context in evaluation (e.g. Greene, 2005; Hood, Hopson and Frierson 2005; Hopson, 2009; Kirkhart, 1995 and 2005; La France, 2001).

Purpose: The place of language, culture, cultural context, and leadership roles in evaluation is explored through consideration of the question, “What does it take to do evaluation in communities and cultural contexts other than our own?”

Setting: Not applicable.

Intervention: Not applicable.

Research Design: Not applicable.

Findings: Attention to the location of power and privilege in evaluation, and to community engagement and ‘sense-making’ processes are the conversational starting points to begin to explore what it takes to do evaluation in communities, where the language, culture, and cultural context are different from one’s own.

Keywords: *culture, context, diversity, power, indigenous communities, communities of color, values, ethics, cultural competence, validity*

In January 2010, the American Evaluation Association (AEA) President's Forum "thought leader" of the week,¹ E. Jane Davidson, started a discussion thread on language, translators, cultural context and other expertise on an evaluation team. This article is an edited version of some excerpts from that discussion, presented here in the hopes of inviting a wider dialogue internationally on this important topic.

What's Wrong with this Picture? (E. Jane Davidson)

Last year I was asked to review a student paper for a graduate course in evaluation. It was a mock proposal to evaluate a community program aimed at Pasifika² communities.

A mixed method design was duly trotted out. The student had spotted that there would be a language issue involved (many of our Pacific people in New Zealand are island-born and have English as a second language). The student "solved" this problem by writing into the budget a couple of \$15/hr "Pacific Assistants."

What's wrong with this picture?

¹ The AEA Thought Leader Discussion Series is an online exchange conducted over the course of a week, where an established evaluator or theorist (the "thought leader" for the month) contributes daily to an online dialogue around issues of importance to the field and to professional practice. New and long-time members of AEA are encouraged to contribute to the discussion.

² Pasifika is a term used to refer to New Zealand citizens and residents who trace their origins to ethnic groups from South Pacific nations. The six largest groupings of Pacific people living in New Zealand are from the islands of Samoa, Tonga, Niue, Cook Islands, Fiji, and Tokelau.

Just a very quick caveat on this: It was not clear whether the student writing the mock proposal was herself Pasifika, but if she was, she should mention this in a proposal as a selling point. The fact that she didn't mention her ethnicity or background at all strongly suggests to me that she was Pākehā (a New Zealander of European descent), so I am going to run with that assumption for now.

What was to be the role of the Pacific Assistants? Well, basically, they would translate the interview questions into Samoan, Tongan, and whatever other languages would be needed; they would conduct the interviews; and then translate the responses back into English so they could be analyzed by those running the evaluation.

What struck me most about this "solution" to the "language problem" were the *underlying assumptions and the implicit messages this sends to the community*:

1. We know best about the evaluation design; we don't need any input from a Pasifika evaluator or researcher; we don't think we'd miss anything crucial by not doing this.
2. It's really just a simple translation job, which anyone can do as long as he or she is bilingual.
3. We won't need any assistance interpreting the data either, thanks. After all, they'll be in English once we get our hands on them. How hard can it be?

Okay, let's start with the Big Issue...

Here in New Zealand we often see RFPs (requests for proposal) for the evaluation of culturally-based (for want of a better word) programs that specifically target Māori or Pasifika communities. I never EVER bid on them, either by myself

or as the lead organization pitching the proposal. I just don't think it's appropriate. There are *many* fantastically talented Māori evaluators out there and a growing number of fantastically talented Pasifika evaluators as well. I just feel it would be insulting to them for me even to suggest I evaluate or take the lead on such a project. Moreover, how would I ever be able to put together a competitive bid, given my lack of cultural and language capabilities in these contexts?

Gone are the days in this country when a Pākehā (New Zealanders of European descent) evaluation team could win a bid on a project like this, even with a couple of Māori or Pasifika researchers on the team. So, the student's project as written would simply never be funded.

But even if the student is not seeking funding from elsewhere (e.g., because she is able to allocate funds out of a budget at her own organization), *I would still ask her to question seriously whether it's appropriate that she lead such a project.* As I said, I am assuming she is not Pasifika herself, which a funder would have to assume since she didn't mention it.

I was quite shocked to beam in by Skype recently to an evaluation class in the United States, where some of the African American students told me it was still quite common for white evaluators to be evaluating in African American communities. *Really?* I was astonished. The pool of African American evaluation talent in the States is just mind-blowingly good, I thought. How could this still be happening?

As I've said, the most glaring Big Issue for me was whether this student should be proposing to lead such a project *at all*. But let us suppose for a minute that that she did decide to go ahead.

Where, exactly, is the project going to need serious Pasifika cultural expertise? Just in the translation of interview questions and responses, as she assumes? No—she's going to need it right up front in the stakeholder engagement process; in the evaluation conceptualization and design phase; *and* at the back end in the sense-making and evaluative interpretation of findings.

Let's talk about the front end first—stakeholder engagement, evaluation conceptualization, and design.

I feel compelled to comment at the outset on how very symbolic it is that Pasifika cultural expertise is relegated to such a low-status role on the team. The reality is that it is of central importance—it will be one of the things that makes or breaks the entire evaluation project. Where a team positions its evaluation staff with cultural expertise, and how many are involved—in positions of influence and power on the team vs. in a low-status role, as a 'critical mass' vs. as the 'token'—speaks volumes about how well the team 'gets' this point. Funders would do well to carefully consider this as a criterion for judging the quality of proposals for culturally responsive *and valid* evaluation.

It's not just that representation from the target population ethnicity or culture is "nice" or "good to have" on an evaluation team; you are actually going to seriously compromise the evaluation's validity and credibility without it.

This project is going to require (1) a mix of consultation and engagement with the community; (2) some form of needs and strengths assessment to understand the key issues in this community and the key enablers, barriers, supports, and strengths that a good program would need to tap into or address in order to succeed;

and (3) some serious conceptualization and design work at the front end, for starters.

The conceptualization and design phase needs heavy involvement from one or more people with in-depth knowledge of and connections in the Pasifika community *and* with evaluation expertise, or at the very least, applied research expertise. Someone who is junior/inexperienced enough to be working at \$15/hr won't be able to provide this kind of guidance (either that, or you are planning to unfairly underpay them for this expertise, as Vidhya Shanker so astutely points out later in this discussion).

The caliber and seniority of the person who leads your entrée into a community is symbolic of how much you respect the people and their culture, how important their participation really is, and how important the program and the evaluation itself are too. This person is the 'face' of your evaluation project, your ambassador. Choose very carefully indeed. There is no shortage of good people to choose from, but they won't be working for \$15 an hour.

OK, you say, but this could be expensive! Not necessarily. Just half a day or even a couple of hours of someone *really* experienced would be worth gold—well worth scaling down your junior research assistants' hours, and in any case, it will save considerable time by helping prevent mistakes. If you're short on budget, try bartering—you donate me this much time and I'll come and do your filing or data cleaning for you next week. Whatever it takes—the project NEEDS this expertise!

Now let's take a look at the 'back end'—the sense-making and evaluative interpretation part of the evaluation.

Let me start with a fairly straightforward point about language and

translation. This point will only be truly understood by those who are fairly fluent in more than one language, and preferably languages that are quite distantly related. And by "fairly fluent," I mean that you speak the other language without thinking in your home language or translating words; you think and even *dream* (and sleep talk!) in the other language at times.

The point is this: Some concepts, ideas, and expressions in one language *simply don't translate* into the other language – the concept doesn't exist, or the nuance is completely different, or the way of making sense is just completely different. So, a lot can get lost in translation. You really need to be rooted in a particular culture in order to interpret some findings. OK, this is going to be more of an issue in some evaluations than in others, but the key point is that one can't just assume that if the data are translated into English, somehow you can just apply a 'mainstream' cultural frame to interpreting what they mean.

So, is it OK to just make sure that there are some bilingual team members on hand to help with the interpretation of evaluation findings? Unfortunately, it's not that simple.

To do an effective job of translating ideas and experiences across cultural boundaries, you really have to understand not just the language and culture, but also the subject matter you are trying to explore, and what exactly you are trying to find out or convey. For example, I have a textbook on evaluation methodology. If I wanted to get it translated into another language, would I just give it to any bilingual person? Would I even give it to an experienced generalist translator with proven fantastic writing skills? No; I would *have* to give it to an evaluator, and not just any evaluator; it would have to be someone who fully understood the

concepts and would be able to convey and explain them effectively.

In an evaluation context, anyone out there conducting interviews has to have a clear sense of what the evaluation is trying to find out, what clues or hints or comments need to be followed up on, how the data are going to be used and interpreted, and what overarching evaluation questions you are trying to answer with each interview or survey question. Qualitative evaluation is so much more challenging in this respect because you are having to make split second decisions in real time as you facilitate an interview (etc.). For this project, the interviewers will need to be familiar with the Pasifika community cultural context and languages, understand the relevant barriers and enablers in that community for the issue at hand, and—very importantly—understand the evaluation questions and how each piece of the interview is going to fit into the big picture.

Later, the evidence needs to be understood and evaluatively interpreted from within the relevant cultural frame or worldview, *as well as* from within the evaluation values, framework, and questions. Further, the findings need to be shared back with the community (as well as the paying client) in a way that doesn't "trample on the mana of the people," as my colleague Nan Wehipeihana would put it ("mana" being a Māori word that here means something like status, dignity, sense of identity/pride).

In summary, when figuring out who should take key roles on a project in a culture outside the so-called 'mainstream,' simply being bilingual and bicultural isn't enough. It's not about having *any* person from the target community involved in the project; it's about having people with *both* the cultural knowledge, language

competence, and community connections *and* the evaluation skills and experience to get the job done well. It's also about positioning those people so that they have power and influence over the evaluation and can ensure that relevant cultural values are privileged so that the evaluation findings are valid, credible, and effectively and sensitively shared back with the local communities.

In closing, because it's traditional in Aotearoa to introduce oneself in terms of one's roots and culture...

Kia ora (greetings). I'm Jane Davidson. I'm a 6th generation Pākehā (NZer of European descent) descended on my father's side from Scottish railway workers (from Muirkirk, near Glasgow) and on my mother's side from rugged English farmers (from Sussex). I grew up in New Zealand, spent four years in Tōkyō (and can speak reasonable Japanese), 12 years in the United States, and currently reside in Tamaki Makaurau (Auckland, New Zealand), in the lands of the Ngāti Whātua people. My husband is a marketing and strategy specialist from Japan who helps companies enter and succeed in the Japanese market, and we have three bilingual/bicultural poppets—Kiri (5), Ema, and Mariko (2-year-old twins).

What Does it Take to do Evaluation in Pasifika Communities? (Nan Wehipeihana)

My own take on the question, what's wrong with this picture, as expressed through the student assignment example, is not so much as a question of language and translators but perhaps through a different lens of **"what does it take to**

do evaluation in Pasifika communities?” (You could also substitute African American, Māori, or indigenous for Pasifika to take an even broader perspective.)

The student assumed that all that is needed is a translator. In my humble opinion, what it takes to do evaluation in Pasifika communities requires a deep, methodological evaluation theory and practice tool kit **as well as** a deliberate, purposeful and responsive attention to culture and cultural context.

I don't want to labor this point too much as there is a growing body of evaluation literature around the importance of culture and cultural context in evaluation (e.g., Greene, 2005; Hood, Hopson and Frierson 2005; Hopson, 2009; Kirkhart, 1995 and 2005; La France, 2001) and much of this discussion I hope will be picked up in AEA's March 2010 discussion series when Rodney Hopson will be the Thought Leader.

When thinking about culture and cultural context in evaluation—in a shorthand form—I tend to think about it in two ways: (1) the 'how to' of engagement and (2) the 'sense-making' process.

The how to of engagement is the 'stuff' of ethical, research and evaluation practice guidelines. Typically, they set out the steps/processes for involvement of and engagement with individuals and communities from conception, evaluation design, data collection, analysis, report writing and dissemination. Often they are 'umbrella'd' under a broader set of principles such as respect, reciprocity, responsiveness, etc. This is all good stuff for practice per se, but particularly when undertaking evaluation in cultures and contexts other than our own.

The sense-making process is about the analysis and interpretation of data. Whilst

much of the formal sense-making takes place towards the later stages of the project, it is seeded from the outset of the evaluation in terms of the framing of the evaluation questions, the preference given to some methods (over others), some stakeholders (over others) and the prioritizations of what counts as valued, or valuable outcomes. Whose values hold sway? Whose voices are privileged? Whose perspectives are valued?

So for me, another point that the student assignment highlights is the evaluator as a cultural being and the role of personal and cultural values in the drawing of evaluative conclusions and the determination of merit, worth or significance. The work here of Hazel Symonette (2004) and Jennifer Greene (2005) springs to mind. Echoing Jennifer Greene, the practice of evaluation is not restricted to the application of methods and techniques to a problem or issue. Rather, it is as much about who we are, and where we position ourselves in relation to others, as it is about what we do (Wehipeihana & McKegg, 2008).

The other aspect of sense-making for me relates to the sense that an evaluator has the *cultural capital* to analyze and interpret data validly in all its richness and subtlety. This in part talks to Karen Kirkhart's (2005) multi-cultural validity but for me is both a professional and political stance, around **“who should be doing/ leading evaluation with and in Pasifika, Māori, indigenous, and African American communities?”** It is not a question of who can—theoretically all evaluators can/could—but it is a question around what is right ethically and methodologically.

I believe that evaluation in Māori communities should be lead by Māori. Māori, for the most part, are more likely to have greater levels of knowledge,

understanding and experience in relation to the 'how to' of engagement—so it makes pragmatic sense. I think it is important to note here that cultural responsiveness in Aotearoa/New Zealand is not the preserve only of Māori; to presume so would be arrogant and demeaning of the many non-Māori or Pākehā (New Zealanders of European descent) who are both adept, skilled and respectful in their engagement in Māori and Pasifika communities.

An evaluator can be responsive and respectful and there is much that can be learnt in relation to cultural knowledge and understanding, indeed there are many examples of this throughout history such as historians, missionaries etc. (It is also fair to say there are also examples in history where anthropologists and historians etc have got it wrong!). However, in my humble opinion there are some things that can't be learnt, known or explored except from within the culture. Therefore, for me it is in the sense-making process that there is no substitute for the cultural capital (understanding, knowledge, and intuit) that comes from being of the culture.

There are times in the analysis and interpretation process when there is alignment between all members of the evaluation team, irrespective of culture or ethnicity and where a non-cultural framework or lens is applicable, for example, a gender analysis or analysis of socio-economic status and where cultural capital seems to be of less importance or relevance. However, it is at times like this, and especially when there are differences in the analysis and interpretation process, whether it is subtle or significant, that cultural capital is essential.

From my experience, it makes a significant difference to the sense-making process if the evaluation team leader is Māori. Whilst I have worked in teams as

the Māori evaluator in the team, it has not always been possible to retain control of the way findings in relation to Māori are reported.

As Jane has pointed out, we are fortunate here in Aotearoa/New Zealand that there is an increasing emphasis in the evaluation commissioning documentation, on Māori taking the lead or playing a significant or meaningful role in research and evaluation studies that have a primary focus on Māori. This is largely due to the socio-political history of New Zealand, Māori aspirations for self-determination and the status given to the Treaty of Waitangi (the founding document of New Zealand). However, there is still a presumption on the part of some non-Māori evaluators that they can do this work well and indeed, have a right to do this work.

Kia ora³ (thank you) Jane for your challenge to non-Māori evaluators to think about the role, position and stance they take in relation to evaluation with and in Māori communities.

As is customary in Aotearoa New Zealand, I'd like to conclude with a personal introduction in terms of my whakapapa (genealogy) and tribal connections.

Kia ora (greetings). I'm Nan Wehipeihana. On my mother's side, my tribal links are to two tribes on the east coast of the North Island; Ngāti Porou and Whānau ā Apanui. On my father's side my tribal links are to Ngāti Tukorehe, an hour north of Wellington. I've been working in the field of evaluation for approximately 15 years, the last 10 of those running my own evaluation consultancy. I live in

³ Kia ora is a Māori greeting which takes multiple meanings in context. In this article, it is used to express thanks (thank you) and as a form of introductory greeting (greetings/hello).

Wellington with my partner Bill and have two daughters Kahiwa (22) and Teia (18).

Power, Politics, and the 'Othering' of Culture (Kate McKegg)

What this discussion raises for me is the much shied away word and concept of power, and the everyday lived reality for many people in our world, of having a dominant culture with power over them, interpreting their reality, in evaluation and in so many other aspects of their lives. Evaluators generally share a commitment to doing good. However, who has the power to decide—about what 'good' looks like, about what the data means, how it will be interpreted and reported is an area with less shared agreement.

The political positioning of different cultures in our society has historically determined whose values and cultural worldviews hold sway in many contexts. In evaluation, this political situation has manifested itself most obviously in a relational sense, with Pākehā (white) evaluators often holding leadership positions in evaluation teams.

This positioning often results in the 'othering' of all other cultural perspectives, different to those of the dominant white cultural worldview. Moreover, in my experience, culture itself becomes 'othered'; that is, it is viewed by the dominant group, or leadership as something others have, and that working cross-culturally is conceptualized as working with those 'others'.

The really major challenge, as I see it, is for many of my fellow Pākehā (white) evaluators to understand ourselves as 'cultural beings,' as having 'culture,' and to acknowledge that our cultural worldview is not 'best' or 'better;' it is

different; and more importantly, this difference precludes our ability to appropriately interpret and make valid, robust sense of people's lives from different cultural contexts.

This doesn't mean we can never work in different cultural settings and contexts; there will be times when our skills are needed and required, but we must understand that our positioning on these teams is a political act, and therefore in cultural settings and contexts different to our own, it is not our role to lead or decide.

I have come to understand that one act that gives practical expression to a different cultural politics than the oppressive acts of my ancestors is to wait to be invited to participate. As a Pākehā evaluator, I will always be a guest in cultural settings different to my own (even if I learn the language, and live among people for many years); and therefore I should act as I would expect guests in my own home to act. I would not expect my guests to start telling me how to cook our meals, or lay my tables, or clean my home, or raise my children, and therefore in cultural settings different to my own, I should listen, acknowledge and defer to the knowledge and experience of those in whose culture I am among.

Of course the implication of this positioning is that the power relations between cultures are shifted, from those we are used to, and most comfortable with. And therein lies the rub.

Sadly, it seems it's not really in human nature to do this easily. However, if we are to truly give expression to our commitment to strive for good, in our culturally diverse societies, I believe that the relations of power in evaluation must shift. Pākehā (white) evaluators and others with power to resource need to invest in and support the development of

evaluators from other cultures to lead and to determine whose values hold sway.

Here in New Zealand, I have come to see that what is good for Māori turns out to be good for all New Zealanders. Lifting the capacity, resources, skills and power of Māori (in evaluation, as well as all other domains of life) lifts the quality, and enriches the lives of all New Zealanders.

Kia ora (greetings). I'm Kate McKegg and I'm a sixth generation Pākehā New Zealander, descended from Irish, Scottish and English immigrants who came to New Zealand in the 1800s. I now live in Te Awamutu, in the north island of New Zealand, with my partner Richard, and I have three beautiful children, Jessica, William, and Patrick.

Power, Privilege, and an Inflated sense of Entitlement (Vidhya Shanker)

I'm never able to respond promptly to these messages but do follow them and want to express my gratitude to Jane for raising this issue (usually it is left to the one or two people of color/ indigenous people in the room to raise such issues—if we want to risk being considered “hostile,” “not a team player,” etc.) and to Nan for addressing it SO WELL.

I just want to add something in regard to the student's use of the word “assistants” and the wage s/he listed. Nonprofit and nongovernmental organizations—and, indeed, government agencies—routinely benefit from the border-crossing/code-switching skills of people of color and indigenous people, which extend far beyond verbal language alone, without ever recognizing or remunerating those skills. Moving between two (or more) worlds requires great expertise that people from dominant

groups have the privilege of never having to cultivate. It is laughable that this student thought s/he could design an evaluation **for** another community and then receive assistance **from** them in delivering it **to** them. But it happens all the time, right in front of my face.

And it is not just a matter of “cultural competence,” either. People from the dominant culture think they can get a “top 10” list of things to do or not do with any particular minoritized culture and that they are then “competent” in it—as if culture is something static that can be “known” instead of something living that is practiced.

I was in a class last year where we were discussing evaluation of a childcare program composed largely of West African immigrants and refugees. Everyone in the class said that they would make sure they didn't have men interviewing women or men and women in the same focus groups. I asked them why. They said because “women in those cultures are more submissive.” Oh really? That was news to my husband, who is a West African refugee (and who has a highly nuanced understanding of gender dynamics, or I wouldn't have married him!).

Did it occur to any of my classmates that the participating women may have been more comfortable talking to a West African man than to them as white women, Western notions of “global sisterhood” notwithstanding? My classmates knew a little (very little) about the relatively larger East African communities (plural) that have been in the Twin Cities longer and extrapolated from that minimal knowledge without ever distinguishing among different regions of Africa, let alone differences in terms of religion, education, urban/rural upbringing, colonial history, etc. They also

understood what they had heard about “East African culture” only as a deficiency in relation to Western notions of “feminism,” “women’s rights,” etc., without ever considering that maybe women of color and indigenous women have our own conceptions of justice with respect to gender.

“What’s wrong with this picture” has very little to do with language or culture and everything to do with power, privilege, and an inflated sense of entitlement.

As the only non-New Zealander among the authors, I will extend my greetings in English. My family is originally from the priestly caste of south India, and my parents were among the earliest arrivals following the 1965 Immigration Act that opened U.S. shores specifically to Asian math and science professionals. Born in the Midwest, I live in Minneapolis—birthplace of the American Indian Movement and home to one of the largest urban Native (originally Dakota/Lakota and Ojibwe) populations as well as one of the largest refugee populations, particularly those with roots in Southeast Asia and East Africa. My husband, Hindolo Pokawa, is from the Mende community in Sierra Leone.

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