

BEING RESPONSIVE:

The First Assessment of Culturally Responsive Evaluation in Wisconsin: Findings from the 2017 Survey

iMilwaukee Evaluation!

CRE

Culturally Responsive
E v a l u a t i o n

Kate Westaby, MS, iMilwaukee Evaluation! Board Member
Troy M. Williams, MA, iMilwaukee Evaluation! Partner
Nicole Robinson, MSW, MPH, iMilwaukee Evaluation! Board President
Emily Connors, MS, iMilwaukee Evaluation! Board Secretary

iMilwaukee Evaluation!

BORN IN MILWAUKEE – SERVING THE STATE

AEA
AFFILIATE

FALL 2019

Suggested Citation:

Westaby, K. A., Williams, T. M., Robinson, N. N., & Connors, E. (2019). *Being responsive: The first assessment of Culturally Responsive Evaluation in Wisconsin: Findings from the 2017 survey.* Milwaukee, WI: iMilwaukee Evaluation!, Inc.

iMilwaukee Evaluation! Inc.

This report was prepared by the board members and affiliated partners of iMilwaukee Evaluation! Inc.

iMilwaukee Evaluation! Inc. is Wisconsin's American Evaluation Association statewide affiliate. The organization aims to promote the science and practice of evaluation in pursuit of social justice, provide a forum for evaluators to network, exchange ideas and knowledge, and participate in critical capacity-building and professional development opportunities. And importantly, we aim to establish a pipeline for evaluators of color and underrepresented groups (e.g., low-income, LGBTQIA+, non-college enrolled, Indigenous, rural, lay, youth, Spanish-speaking) to increase the number of underrepresented evaluators practicing throughout the state of Wisconsin and to address systemic oppression and inequality.

Suggested Citation: Westaby, K. A., Williams, T. M., Robinson, N. N., & Connors, E. (2019). *Being responsive: The first assessment of Culturally Responsive Evaluation in Wisconsin, Findings from the 2017 survey*. Milwaukee, WI: iMilwaukee Evaluation!, Inc.

Contact Information

Email: Milwaukeeevaluation@gmail.com



evaluation.wildapricot.org



[@MilwaukeeEval](https://twitter.com/MilwaukeeEval)



[@MilwaukeeEvaluation](https://www.facebook.com/MilwaukeeEvaluation)



[Milwaukee Evaluation](https://www.youtube.com/MilwaukeeEvaluation)

iMilwaukee Evaluation!

FIELD DEVELOPMENT, NETWORKING & PIPELINE **AEA**
AFFILIATE

Page layout and graphic design by Ryan Aubert
RyanAubertDesign.com, Milwaukee, WI.

Copyright © 2019 by iMilwaukee Evaluation! Inc. All rights reserved.

Acknowledgments

Throughout this project, we were able to tap into the wisdom and encouragement of many individuals in Wisconsin and across the country, including members of the American Evaluation Association network. With heartfelt appreciation, we thank those who supported the development of this survey: Paul Elam, Michelle Robinson, Kathy Newcomer, and Cindy Crusto. We are grateful to the individuals who participated in the survey for their candor. In addition, we thank Annalee Good for providing space and resources for the data parties. We also thank those who participated in the data analysis sessions: Amy Hilgendorf, Amy Owen, Ellie Hartman, Hazel Symonette, Karen Reece, Nola Walker, Oriana Eversole, and the 21 other individuals who also participated. Finally, we thank those who provided feedback on this report: Nora Barr, Gerardo Rodriguez, Miloney Thakrar, Monique Liston, and Paul Elam.

The views and statements expressed in this publication are solely those of the authors and iMilwaukee Evaluation! Inc. They do not purport to reflect the opinions or views of dues-paying iMilwaukee Evaluation! Inc. members (past, present, or future) or individuals acknowledged for providing editorial assistance during this project.

Table of Contents

Executive Summary ... 5

About ;Milwaukee Evaluation! Inc ... 7

About this Survey... 9

Results ... 10

Crucial Recommendations... 20

Conclusion... 22

References... 23

Appendix 1: Methods... 24

TABLE OF CONTENTS

Being Responsive: The First Assessment of Culturally Responsive Evaluation in Wisconsin: Findings from the 2017 Survey

Executive Summary

“It is all about power and money. The same folks are getting the same evaluation (or research or TA [technical assistance]) grants or contracts and conduct evaluations in the same way. It isn’t rocket science why some of the same chronic outcomes and poor quality of life have not changed. Evaluation and research studies need to be built differently by different people. Higher education needs to produce researchers, evaluators, and policy or organizational leaders with critical race, community-based, Tribal governance, and a whole lot of other ‘core content.’ If we keep producing basically the same monolithic group of academics, how will things ever change? This is embedded in the systems and institutions of education, policy, procurement, political, and monetary practices. People who educate the next generation of academics and award contracts, grants, keynotes, or presidential sessions MUST be held accountable for structurally ensuring and requiring diversity in curricular content, human resources, funding priorities, contract/grant awards, keynotes, publications, etc., or things won’t change.”

- Survey respondent

Background

Established in 2012 and recognized by the American Evaluation Association as the statewide local affiliate, ¡Milwaukee Evaluation!, Inc. aims to fundamentally change the way evaluation is practiced in Wisconsin. We believe when social justice is intentional and authentically infused into the evaluation process, society will become more equitable and just. We also believe that when power is redistributed throughout the evaluation field, a new, intersectional and intergenerational evaluation workforce will emerge ready to address the most prominent issues of the 21st century. ¡Milwaukee Evaluation! Inc.’s work calls out, resists, and undermines the institutional racism, sexism, classism, and oppression inherent in the existing evaluation infrastructure in the state.

This is the first known survey to assess the use of Culturally Responsive Evaluation (CRE) in Wisconsin. The survey, along with a series of focus groups with evaluators of color (report available in 2020), is designed to understand a subset of evaluation practices related to CRE. CRE prioritizes social justice, evaluators of color, culture, and context as essential to valid knowledge production in general and evaluation in particular. We begin the discussion with an emphasis on CRE, how/if/when it is practiced, and the barriers to its use, though we readily recognize other styles of evaluation for social justice (e.g., Feminist and Emancipatory) and that a study of their use in the state would be equally valuable and instructive.

We launched the survey in the fall of 2017, and 54 Wisconsin evaluators and individuals who conduct evaluations responded. In 2018, we began analyzing the results, a process that involved two in-person data parties with 28 evaluators to interpret the results using data placemats. In 2019, we began sharing our preliminary findings in formal settings, including our flagship Social Justice & Evaluation Conference in March 2019. In this report, we present a series of recommendations for funders, organizational leaders, evaluators, evaluation users and consumers, and other practitioners (e.g., data scientists, universities, and government agencies).

Key Findings and Recommendations

The survey results revealed the following:

- **Survey respondents reported that their evaluations are conducted with inconsistent representation, contribution, and leadership from the individuals most impacted by the program or policy.** Evaluation teams consist of mainly White evaluators who work with programs and policies impacting individuals from diverse backgrounds. To address this,

evaluation firms, independent consultants, and evaluation teams within larger institutions (e.g., government, non-profit) must **promote internal policies** requiring that **the populations most impacted be integrated into the evaluation decision-making process** from the start of the project. Evaluation entities must also conduct reviews of their **hiring and promotional policies** to understand the workplace bias that results in White-led and White-dominant evaluation teams and the oppressive barriers to diversifying paid evaluation staff.

- **While several survey respondents rated themselves highly on measures of cultural responsiveness, only 37% of respondents stated they had incorporated CRE into their work to some degree, and most evaluators rated their skills as low.** Cognitive dissonance is a common phenomenon. We want to exercise but also binge Netflix. Netflix wins. We want to conduct culturally responsive evaluations, but traditional evaluation wins. The CRE survey results do not tell us exactly what is happening. Is it the lack of evaluator knowledge or skills, or both? Do evaluators not value and prioritize cultural responsiveness and its underlying tenets to the extent needed for change? Did the survey accurately measure racist and oppressive beliefs? Is it that the evaluator holds social justice beliefs, but institutional or client practices impede its use? The survey results suggest that multiple factors are at play. Accordingly, we ask individual evaluators to challenge themselves to increase their structural competence¹ in current and historical injustices and to call out as individuals, evaluation practices policies, and programs that can perpetuate injustice in the absence of this lens. Moreover, we ask academic entities to intentionally teach Culturally Responsive Evaluation and that any evaluator presenting at a conference, staff meeting, or other capacity-building setting embed social justice, such as partnering with community members, in the presentation. Lastly, we recommend evaluation departments and evaluation firms create internal organizational learning spaces to share resources and expertly mentor and challenge each other (particularly since few spaces like this exist across the state).
- **Funders served as the greatest barrier to conducting Culturally Responsive Evaluation.** Survey participants reported that funders do not request CRE and provide little support for related practices (e.g., longer timelines to meaningfully engage the populations most impacted in the evaluation). This finding highlights the need for grantmaking institutions, and the philanthropic sector as a whole to assess their implicit and explicit evaluation values and practices and re-align their approach. Culturally responsive assessment is culturally affirming and sustaining; it aims to eliminate exploitation. We recommend funders support CRE and Indigenous, Feminist, and other social justice approaches.

Call to Action

The findings in this report offer some promise but unveil structural problems. If we administer this survey again, we hope to see:

- an increase in evaluation teams that include the populations most impacted as decision-makers and an increase in racially/culturally diverse evaluation teams;
- evaluators who are not only aware of CRE but are actively practicing CRE; and
- improved environmental conditions that are conducive to CRE (e.g., a supportive philanthropic sector such that grantmakers request CRE by name or require its principles in requests-for-proposals) as well as internal organizational policies and learning spaces that make it easier for individual evaluators to call out unjust, exploitative practices and demand change.

The field of evaluation needs advocates of all races, ethnicities, genders, sexual orientations, religions, and classes to step up to shift the field and its influencers to realize social justice for all.

¹ See Metzl, J. M. (2012). Structural competency. *American Quarterly*, 64(2), 213-218.

About iMilwaukee Evaluation!, Inc.

Established in 2012 and recognized by the American Evaluation Association as the statewide local affiliate, [iMilwaukee Evaluation! Inc.](#), set out to diversify the evaluation workforce in Wisconsin and influence the practice of evaluation to deeply embed social justice principles into everyday evaluation activities. Its specific aims are to:

- promote the science and practice of evaluation for social justice in both the public and private sectors of society;
- provide a forum for professional evaluators to network, exchange ideas and knowledge, and participate in professional development activities that promote excellence in the field of evaluation; and
- establish and maintain a pipeline for evaluators of color and underrepresented groups (e.g., low-income, LGBTQIA+, non-college enrolled, Indigenous, rural, lay, youth, Spanish-speaking) practicing throughout the state of Wisconsin.

Moved by the 2011 AEA [Public Statement on Cultural Competence](#) that asserts that the validity of an evaluation requires cultural competence and that ethical evaluation must recognize power dynamics, the affiliate has sought to address structural challenges within the evaluation field. From the outset, the affiliate's founders and early supporters surmised the following:

- **Too few evaluators of color are practicing in the state of Wisconsin.** Some were discouraged from entering or staying in the field of evaluation; others moved out of state for better evaluation job opportunities, thus contributing to a brain drain. Evaluators of color often held the lowest-paid positions and had little opportunity for advancement to lead, manage, or direct evaluation teams or firms. Most evaluators of color were relegated to outreach and language translation activities. These trends occurred despite widespread recognition that diversity, representation, and inclusion mattered on the programmatic side (it should follow that it matters on the evaluation side too) and that substantial evaluation and research funding directed to communities of color would presumably value diverse evaluation teams and evaluation team members with lived experiences. The lack of evaluators of color and diverse teams has had rippling occupational consequences. Affiliate founders noticed that there were few senior evaluators and that new and emerging evaluators of color lack an in-state mentor or elder of color. Locally based evaluation firms have difficulty attracting and retaining evaluators of color.
- **Most evaluation reports were apolitical and lacked an understanding of White supremacy,** even if they purported to address health, economic, social, and political, racial disparities. Many evaluation projects (and written reports) prioritized a narrative that problematized people of color, used methodologies that reinforced that narrative, never challenged paternalistic program practices, and made it difficult to address racism in multiple sectors via the evaluation.



The American Evaluation Association (AEA) is an international professional association of evaluators. AEA has approximately 7,000 members who represent all 50 states in the US and more than 75 foreign countries. (eval.org/evaluationroadmap)

WHAT IS WHITE SUPREMACY?

White supremacy refers to political, economic, and social systems that result in racial and social hierarchies and the exploitation, domination, and oppression of people based on race and other identities.² To understand how white supremacy affects the scientific process and knowledge development, see works by Zuberi and Bonilla-Silva (e.g., *White Logic, White Methods*).

² Zuberi, T., & Bonilla-Silva, Eduardo. (2008). *White logic, white methods: Racism and methodology*. Lanham: Rowman & Littlefield.

- **The capacity-building, professional development, and leadership opportunities available in Milwaukee, the state's largest city, were not in keeping with the national conversation around the intersection of racism, evaluation, and the evaluator's social responsibility to counter injustice.** In fact, most professional development and capacity-building opportunities were inherently apolitical and supported a post-racial evaluation agenda that effectively stalled transformative evaluation practices. As a result, Wisconsin evaluators across race, geography, discipline, and sector lacked the necessary skills to address domination, exploitation, and oppression stemming from the White supremacy embedded within either the program or the chosen evaluation approach. They tended to engage in non-productive, "diversity" discussions. This pattern led to the distorted use of the terms "data-driven" and "evidence-based," which legitimizes some knowledge but not others (i.e., lived experiences). The field's silence toward White supremacy reinforced a culture where evaluation was distinct from social justice rather than a tool for social justice.

WHAT IS SOCIAL JUSTICE?

Social justice is a process, not an outcome, which:

1. seeks the fair (re)distribution of resources, opportunities, and responsibilities;
2. challenges the roots of oppression and injustice;
3. empowers all people to exercise self-determination and realize their full potential; and
4. builds social solidarity and community capacity for collaborative action (UC Berkeley, no date).

- **Finally, White evaluators (and allies) who had the power to do something did not advance a call to action or develop a plan in the field** to rectify the situation by tangibly diversifying their teams or planting the seeds of social justice within the larger evaluation community. This is a point we will address in an upcoming report as their silence has created an exclusionary evaluation infrastructure; impaired the ability of evaluation consumers and stakeholders (e.g., grantmakers) to view evaluators of color as legitimate; hampered the field's ability to name, identify, and respond to client policies or programs that reinforce White supremacy. The consequences of their silence, we believe, has direct ties to the racial and economic inequality that is observed throughout the state.

We began meeting and established the affiliate to create an evaluation infrastructure that would directly address these issues. The affiliate is values-based and volunteer-run. It provides professional development activities that are people of color-centered in the areas of emancipation and liberation. While it emphasizes race, it also considers gender, class, and sexual orientation equally important. The affiliate has leaned on CRE as a point of entry with which to discuss the relationship between social justice and evaluation, help prepare evaluators to address injustice, and ensure that diverse evaluation teams are capable of meeting 21st-century demands. CRE, in addition to other styles such as Feminist evaluation, offers guidance on evaluator capacity needs and explicitly states that the composition of the evaluation team matters.

ABOUT THIS SURVEY

Since its inception, iMilwaukee Evaluation! Inc. wanted to survey the field on issues of social justice and Culturally Responsive Evaluation capacity. In 2017, it began to do so.

We focused on Culturally Responsive Evaluation because it is an approach that supports validity and ethical rigor in evaluation results. The American Evaluation Association's Guiding Principles state, "To ensure recognition, accurate interpretation, and respect for diversity, evaluators should ensure that the members of the evaluation team collectively demonstrate cultural competence." Given this understanding, this survey project boldly aimed to:

- understand how evaluators did or did not operationalize CRE in their work;
- identify systemic and capacity barriers of and facilitators for using CRE;
- share CRE survey data with the local evaluation community to gain broader interpretations of survey results and meanings as well as the shared buy-in of its interpretations and recommendations, and;
- use the results to inform the affiliate's field development strategy and activities and its professional development opportunities.

As we embarked on this project, we wanted to build trust and increase transparency with the evaluation community by keeping the members directly engaged and updated throughout the process. We also wanted the members of the larger community to participate as leaders working behind the scenes and sharing responsibility with the larger community. To that end, we engaged Troy M. Williams. In addition, we held two data parties to help interpret data and engaged 28 Wisconsin evaluators. Our collective efforts culminated in this final report. If resources permit, it may be updated and expanded in the future to assess the progress within the state.

WHAT IS CRE? (CULTURALLY RESPONSIVE EVALUATION)

Culturally Responsive Evaluation centers values and cultural beliefs on the evaluation of a program or policy. It provides a particular focus on groups that have been historically marginalized, asking how power is distributed, which relationships are valued, and which are privileged in an evaluation (Hood, Hopson, & Kirkhart, 2015).

AWARENESS IS HIGH, APPLICATION IS LOW

AEA's Statement on Cultural Competence

Promisingly, 70% of survey respondents reported hearing of and/or reviewing AEA's 2011 Statement on Cultural Competence; however, less than a quarter (22%) of survey respondents stated they had incorporated it into their work (see Figure 1). Still, many respondents had been contemplating how to do so. When asked about these results, one data party participant stated, "Often, statements stay statements and go no further." In Wisconsin, AEA's statement has had some influence, but much more could be done to apply the important tenets within the statement.

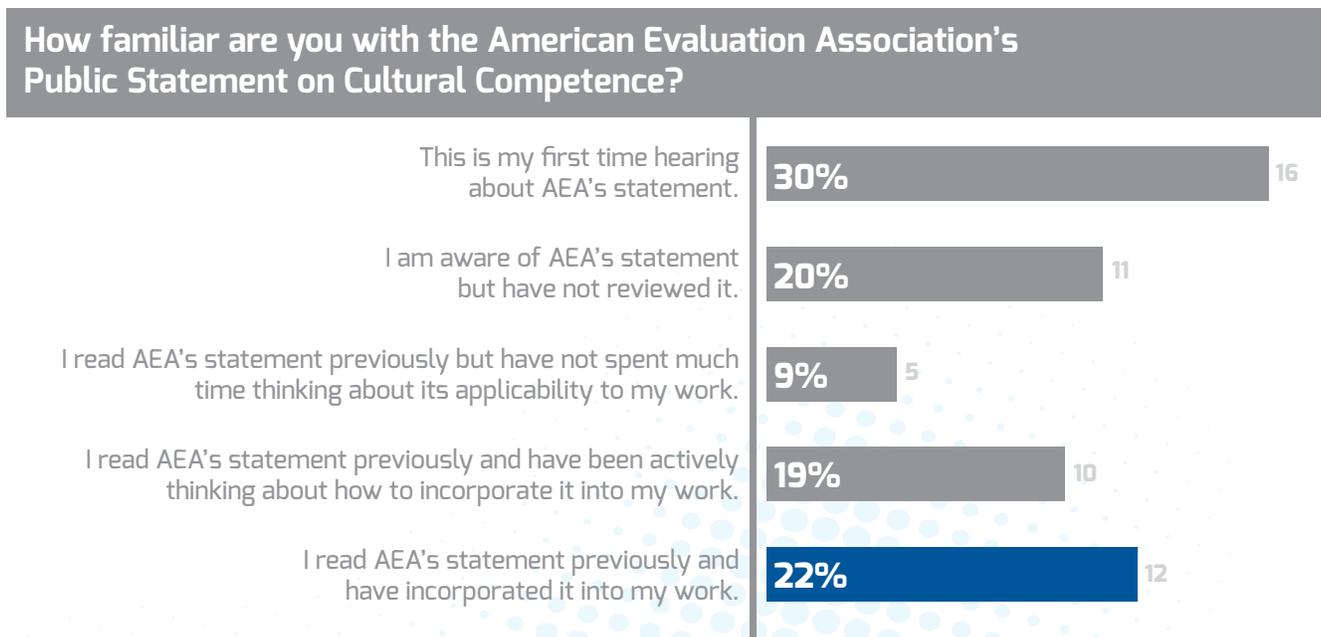


Figure 1. Wisconsin evaluators are aware of AEA's Public Statement on Cultural Competence, but it has had little impact on the practice of evaluation in Wisconsin.

Culturally Responsive Evaluation

While eighty-seven percent of survey respondents (n = 47) reported an awareness of CRE, a much smaller number (37%) stated they had actually incorporated CRE into their work (see Figure 2). When asked further about this application, more than half of the respondents reported that they used CRE to develop evaluation plans (59%), choose evaluation questions (59%), and collect (52%) and report (52%) on the findings. Fewer respondents (37% and 31%, respectively) reported they use CRE to analyze the data and develop evaluation teams (see Figure 3), two immensely important tenets of CRE. Again, the data shows that awareness is high but has not reached a high enough level of application or practice.

How familiar are you with Culturally Responsive Evaluation?



Figure 2. Most respondents were familiar with CRE. Only 37% felt they had incorporated CRE into their work.

Evaluators use Culturally Responsive Evaluation when:

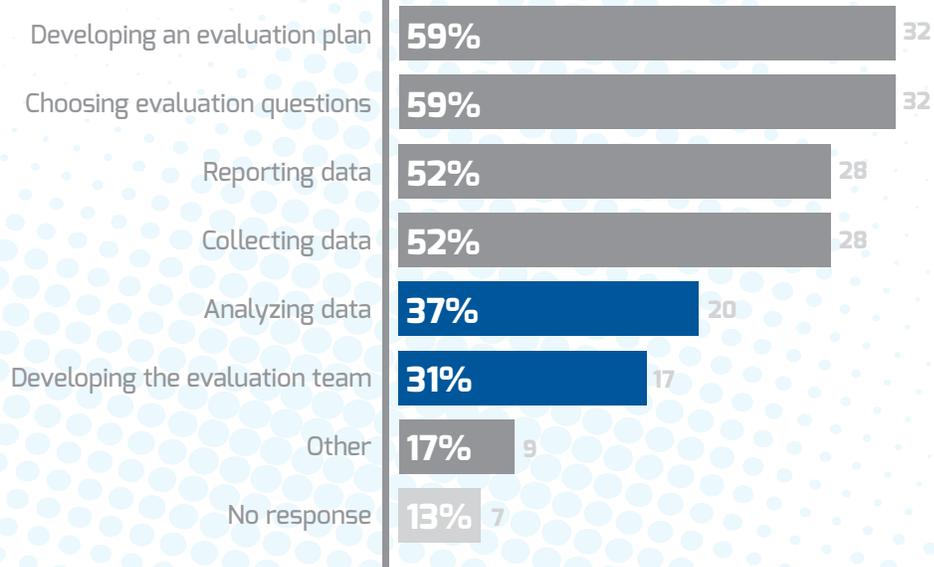


Figure 3. Evaluators were asked when they used CRE in evaluation processes. The use of CRE to analyze the data and develop evaluation teams, important tenets of CRE, were low. Respondents could select all that applied.

INCONSISTENT REPRESENTATION

Survey respondent data suggests that most evaluations are being conducted with **inconsistent representation, contribution, and leadership from the individuals/groups most impacted by the program or policy being evaluated.** When asked what percentage of the time culturally responsive tenets (e.g., representation of individuals with lived/shared experience as part of the team) were present in their evaluation work, respondents stated that this happened less than half the time (see Figure 4). The results can be approximately split into thirds: one-third of the respondents are not doing the practices at all, a third group of respondents are doing the practices about half the time, and a final group of evaluators are doing each practice nearly all the time.

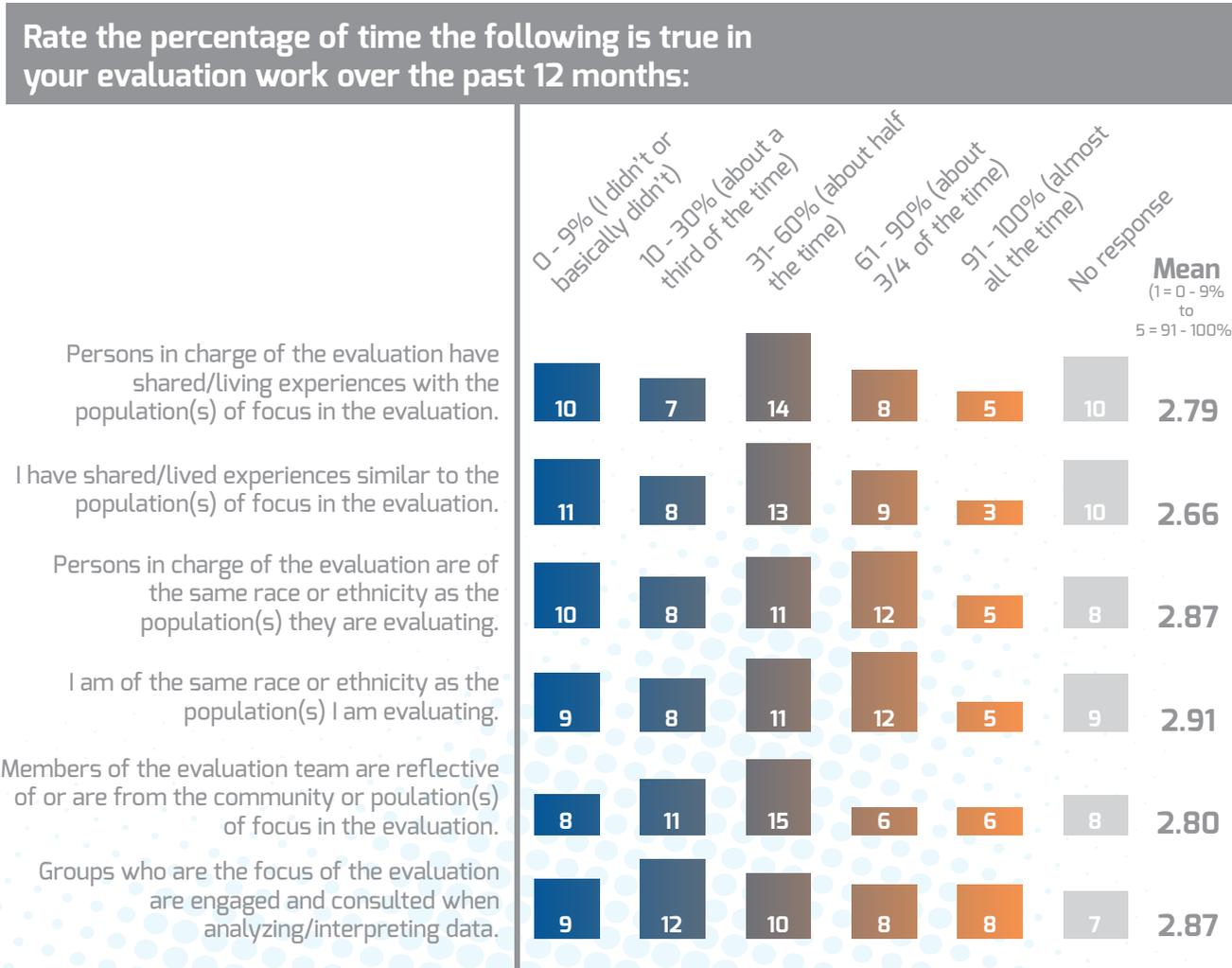


Figure 4. Respondents rated the percentage of time that CRE tenets were true in their evaluation work over the past 12 months.

We examined the respondent responses by race/ethnicity. We found that when assessing the practices of the people in charge, respondents of color (n = 21) reported lower scores when compared to White respondents (n = 33; see Figure 5). Respondents of color believe that people of color are less represented than their White counterparts believe.

These findings point to the need for White people to share responsibility in ensuring evaluation teams are representative of the populations they are serving. One data party participant stated, "White people need to step up! This cannot just be people on the margins pushing for change. This is why burnout occurs." To serve as effective allies, White people need to routinely and proactively champion for diverse and representative evaluation teams.

Data further supported these findings. We asked respondents to rate the challenges they encountered while doing CRE. Of the 47 respondents, 41% found it challenging to ensure that persons in charge of the evaluation "have shared/lived experiences" or were "of the same race or ethnicity" (39%) as the population(s) of focus in the evaluation (see Figure 6).

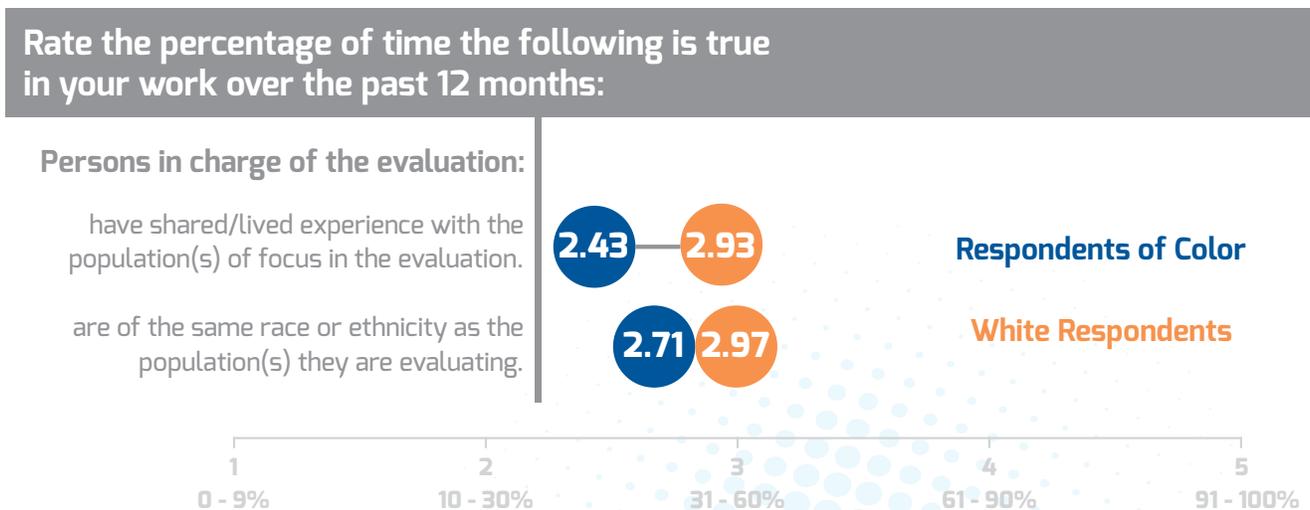


Figure 5. Respondents were asked to rate the percentage of time the above items were true on a 5-point scale from 1 = "0-9% (I didn't or basically didn't)" to 5 = "91-100% (almost all the time)." On average, persons of color believed less of the time that evaluation leadership had shared/lived experience with the population(s) of focus compared to White respondents.

Which of the following are most challenging in your work? (select up to five)

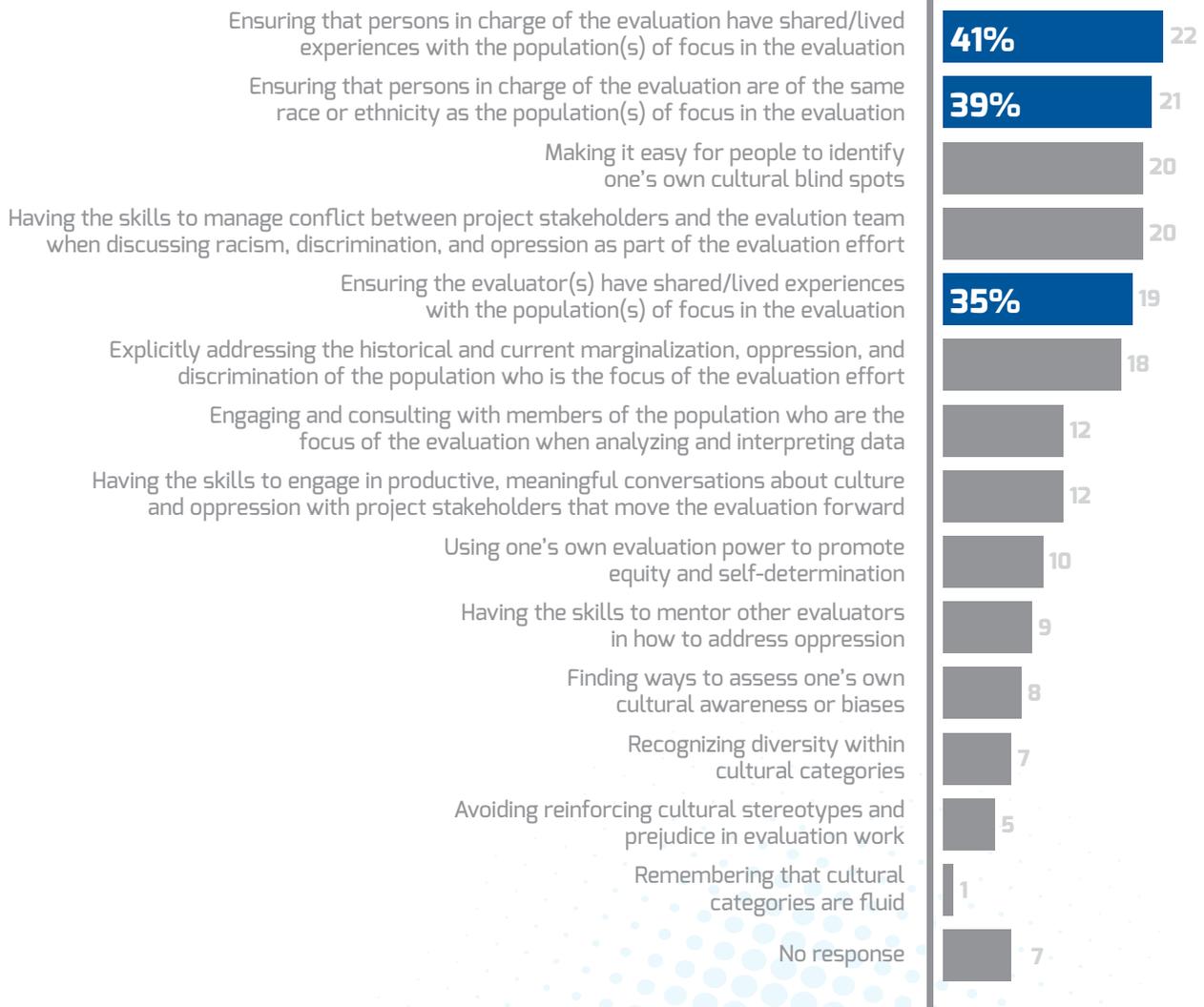


Figure 6. The most frequent responses to “Which of the following are most challenging in your work? Select up to five.” Several of the most frequent responses were related to excluding individuals most impacted from positions of power in the evaluation.

A sizable group of survey respondents do not use CRE when developing evaluation teams (only 31% selected it; see Figure 3). One survey respondent provided illuminating insight into why there might be low rates of inclusion, stating “often there are not enough opportunities to have these discussions, especially when working in bureaucracies and there is pressure to just ‘get it done’ without enough thought or engagement from the people who are affected most by the issues.” This insight speaks to the need for organizations to reflect on conflicting values when productivity may be in opposition to inclusionary and social justice processes.

Data party participants discussed several promising advocacy strategies to increase inclusion, including educating organizational leadership about negative (and unjust) consequences of excluding the most impacted populations from the decision-making process. Other strategies included sharing peer-reviewed CRE resources or AEA’s cultural competence statement, **evaluator competencies**, or guiding principles endorsed by the largest professional evaluation organization in the country, all of which might sway some stakeholders to support evaluation practices consistent with CRE.

GAPS IN ANTI-OPPRESSION SKILLS

We found **major practice gaps** that have implications for individual professional skill development, application of CRE (e.g., project management), organizational practices, and systemic issues such as the lack of CRE mentors. This survey covered many interrelated topics from cultural responsiveness, CRE, and a subset of emancipatory, anti-racism/discrimination, and anti-oppression topics in an attempt to identify future professional development and emancipatory capacity-building for the state. We asked survey respondents to rate their practice in several areas of CRE (see Figure 7). Responses varied but overwhelmingly corresponded with a belief in cultural responsiveness. yet lower ratings in the skills related to cultural and structural responsiveness.

Further, on average, persons of color rated themselves more highly on all but one self-assessed item when compared to White respondents (see Figure 7). One survey respondent provided further detail on White allyship in Wisconsin: *“There is a lack of White people who are ready to be good allies. It’s so frustrating because it’s the people of color who have to do all the work in these spaces, and some can’t even speak up for fear of losing that relationship.”*



Rate the percentage of time the following is true in your work over the past 12 months:

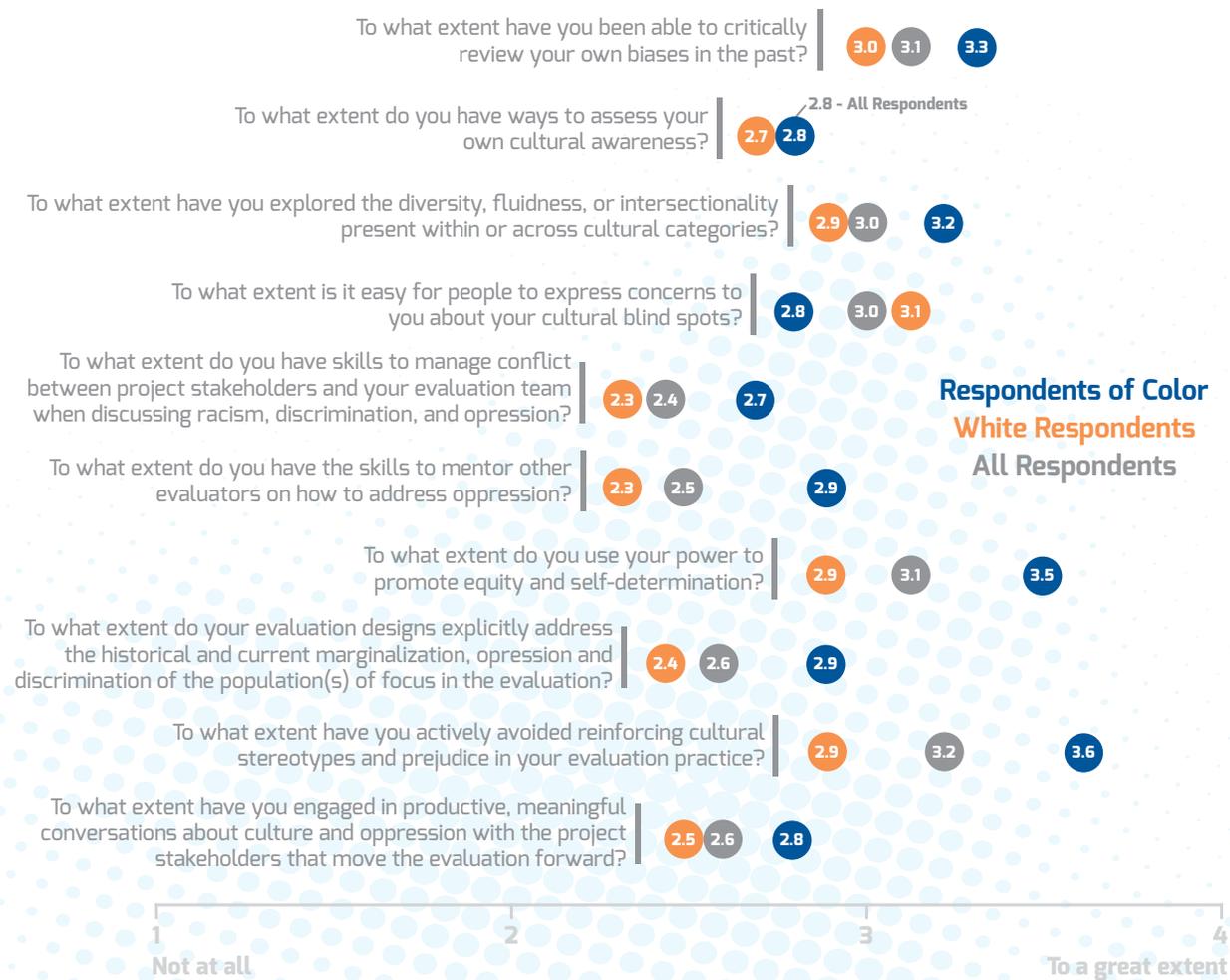


Figure 7. Respondents rated whether these statements were true on a four-point scale (4 = To a great extent; 3 and 2 unanchored; 1 = Not at all). Respondents of color rated themselves more highly than White respondents on all but one measure. On average, White respondents perceived themselves to be more open to feedback about their cultural blind spots.

When looking at responses by years of experience, about half of the survey respondents (n = 26) had six or more years of evaluation experience. When compared to the other half of the evaluators (n = 23) with less than six years of experience, **the more experienced evaluators ranked themselves more highly on all measures of skills and practices of cultural responsiveness.** This included higher ratings on the percentage of time that experienced evaluators were:

- conducting more culturally responsive evaluation practices (e.g., ensuring that the people in charge of the evaluation “have shared/lived experiences” or were “of the same race or ethnicity” as the population(s) of focus in the evaluation) (see Figure 8); and
- carrying out culturally responsive tenets (e.g., “to what extent do you use your power to promote equity and self-determination?”).

It is possible that evaluators with more experience have increased skills in cultural responsiveness. However, we might question their ratings as desirability-based given the vast differences in their ratings of perceived items such as “Persons in charge of the evaluation have shared/lived experiences with the population(s) of focus in the evaluation,” which was rated as 2.14 by those with less than six years of experience and 3.36 by those with six or more years of experience. More research that independently assesses the actual evaluation process and procedures for cultural responsiveness should be completed to better understand the validity of these ratings.

Rate the percentage of time the following is true in your work over the past 12 months:

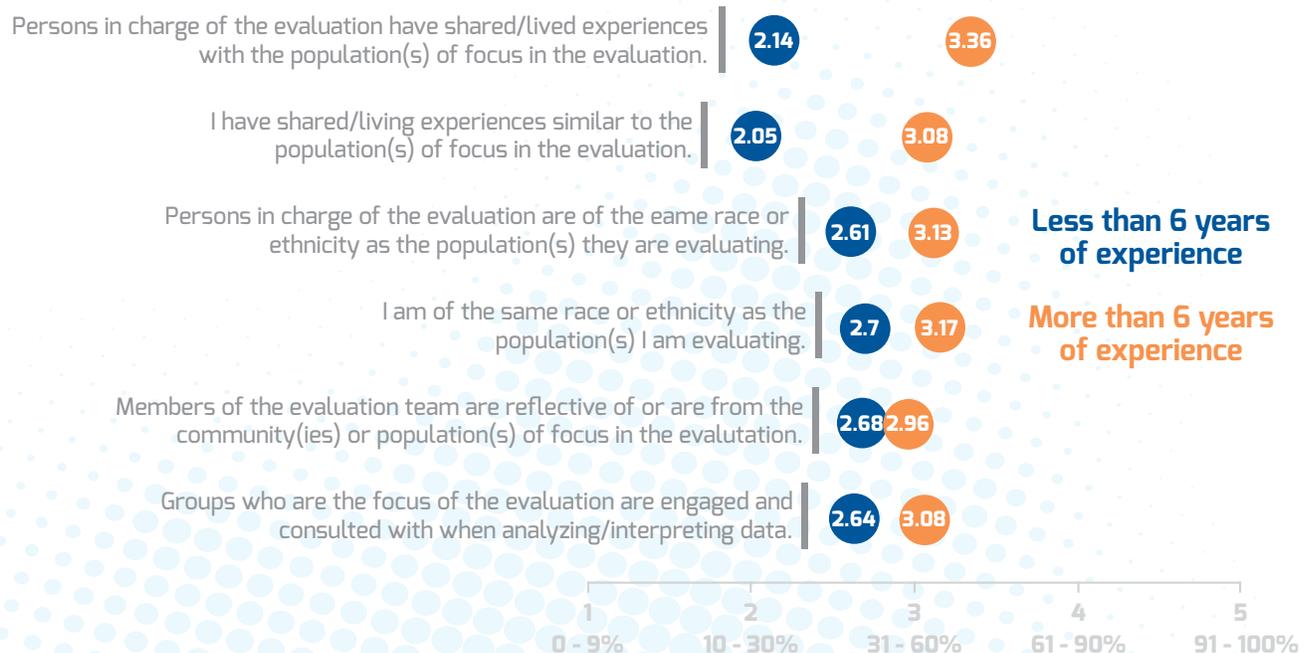


Figure 8. Respondents rated the percentage of time they engaged in the practices on a five-point scale, with anchors of 1 = 0-9% (I didn't or basically didn't), 2 = 10-30% (about a third of the time), 3 = 31-60% (about half the time), 4 = 61-90% (about ¾ of the time), and 5 = 91-100% (almost all the time). Individuals with more than six years of experience felt that they and the field were doing better on cultural responsiveness than less experienced evaluators.

In accordance with the demonstrated need for evaluators to do much more to advance social justice, some evaluators indicate they are intentionally applying a social justice lens to their evaluation-related decisions. For example, one survey respondent stated,

“Each measure, indicator, question, and framing are openly discussed regarding: 1) its importance and significance of understanding the subject matter; 2) its conception and interpretation broadly—and whether it’s associated with negative stereotypes of the community being centered; 3) the political and ethical ramifications of it; and 4) if problematic, but important, the alternative ways of measuring, quantifying, describing, or framing it in order to ensure that harm is lessened. Additionally, my approach to research is community-driven, which means that community is a part of the process from start to finish, and [the community’s] concerns and perspectives shape what is included and excluded.”

Another respondent highlighted the importance of being intentional about using more positive narratives about underrepresented communities: *“I choose to avoid tools that focus on criminal activity in Black neighborhoods and focus on social capital measures instead.”* A thorough review of indicators, measures, evaluation questions, and report framing is one example of how organizations can be more intentional about implementing the processes to institutionalize social justice evaluation.

In addition to intentional decision-making processes, language is an important aspect of CRE, and several survey respondents reported that they actively avoided reinforcing cultural stereotypes and prejudice. They aimed to call attention to those who are privileged by language and to scrutinize the language choices in the following examples:

- *“In meetings, I ask people to specify what they mean if they use terms like, ‘those families’ or ‘those kind of parents.’ This is awkward and creates tension but also prompts really important discussions about the assumptions that people bring to their work.”*
- *“I seek to disrupt the traditional language used in evaluations that examine school achievement. Youth were instrumental in creating the survey used and were given the space to speak their truth in regard to their experiences in the public education system, which many did.”*
- *“We’ve thought about how to frame reports to ensure we don’t talk about communities as needy, poor, etc. Instead, we’ve been trying an asset-based approach, talking about what communities have going for them and what they’ve been able to harness to create positive change.”*

This attention to language and the inclusion of lay evaluators in the dissemination and process of evaluation are two among many approaches for ensuring a more Culturally Responsive Evaluation process.

FUNDERS, CLIENTS, AND OTHER STAKEHOLDERS DO NOT REQUEST CRE

We asked survey respondents to rate several known barriers to using CRE and to tell us about some of the challenges they encountered in their work. **The most common barrier selected was, “Funders don’t request/want CRE” (see Figure 9).**

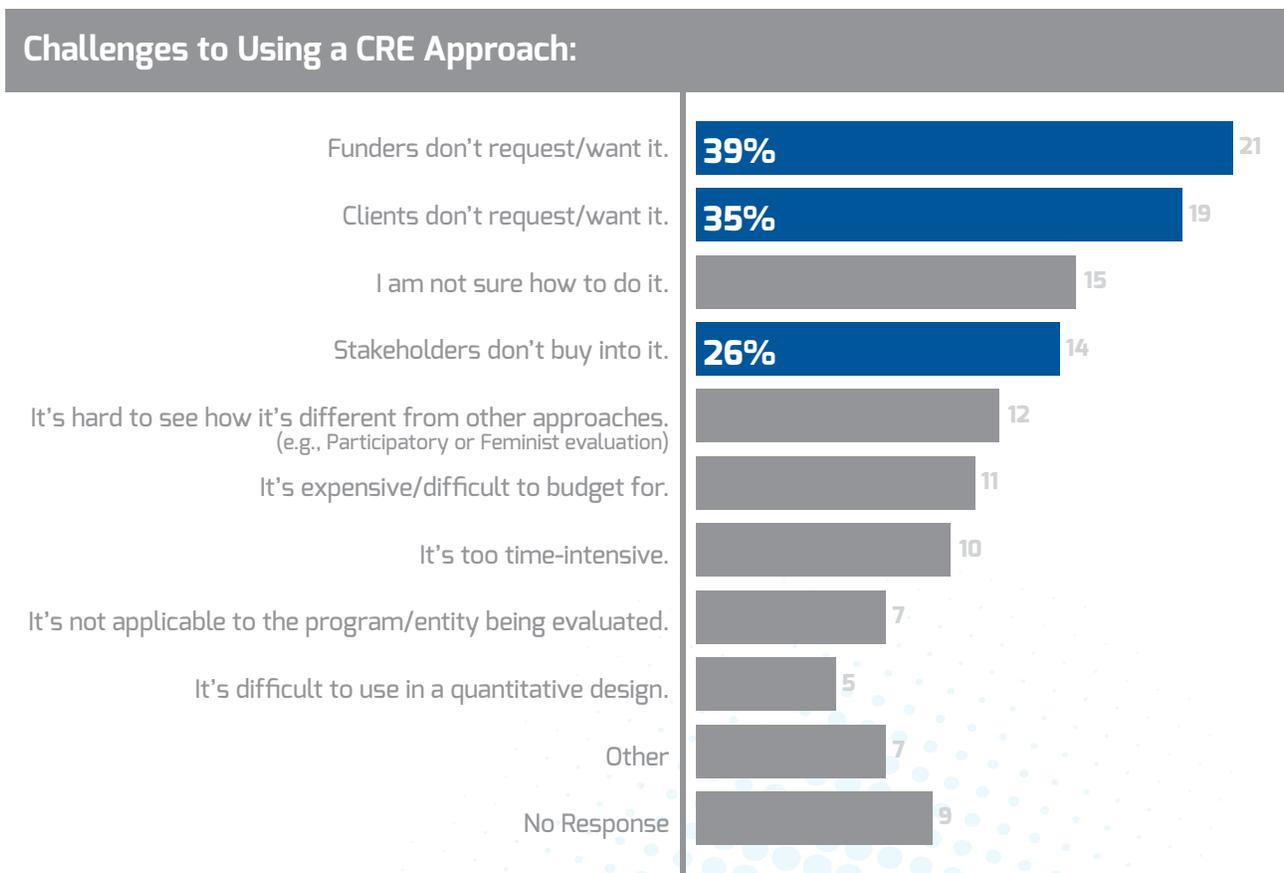


Figure 9. Those who control projects and policies (funders, clients, and stakeholders) were most frequently chosen as challenges to using a CRE approach. Respondents could check all that applied. Most respondents selected only one ($n = 13$) or two ($n = 12$) of the listed challenges, followed by selection of zero or three ($n = 9$).

Quotes from the survey explain why funders often do not request CRE:

- *“CRE represents a tremendous shift in organizational culture and philosophical views. Funders are challenged by an approach [CRE] that inherently challenges their way of doing business.”* Using CRE requires power to be redistributed to historically marginalized communities, so they can decide the focus of the evaluation, determine what counts as success and credible evidence, and be responsible for interpreting the data’s meaning and the best course of action. The historically and traditionally least powerful evaluation stakeholder, the evaluand, would assume many of the same responsibilities of the so-called experts and of the funders themselves.
- *“Given the culture of funding, an evaluation proposal with a CRE approach could be seen as less advantageous by funders.”* Since funders often ask for “rigor” according to experimental standards, they are unlikely to score the elements that are the tenets of CRE (e.g., evaluation that includes leadership from those with lived experience) as highly.
- *“Funders will ask for ‘cultural competency’ on the team but do not understand fully what those processes mean and how much time and money it will take to do CRE well.”* Even when participatory evaluation methods are used, the evaluand’s role is typically reduced to providing input and feedback in a listening session or focus group rather than making strategic decisions at senior executive tables. Survey respondents raise an important point about the lack of clarity and understanding of cultural responsiveness among various stakeholder groups, including evaluators. Currently, we do not have clear-cut rubrics for excellent and authentic CRE, mid-grade CRE, and so forth. How do we prevent a “watering-down” of the approach as more evaluators practice it? In addition, one survey respondent provided an example of why longer timelines are needed. In this case, it was to help a person of color avoid the internalization of oppressive frames, stating, *“...just recently, I had to tell someone they are not an ‘Angry Black Woman’ and help them to not internalize that viewpoint. After that, we didn’t have time to identify the next steps for her to deal with her colleagues. Helping people see their blind spots causes White fragility, which can make the room awkward and stifle conversation. Then, people need time to process that, heal from it, and move forward. Most meetings are one hour and usually, you stumble across a blind spot and then have to come up with a process to address it on the spot. The nuance of each blind spot is hard to predict and harder to broach. Then, when you do, you can’t achieve the other meeting objectives.”*

While the majority of the survey respondents indicated that funders often serve as a barrier to CRE, some respondents reported having some success with funders. One survey respondent gave examples that could be replicated by others, *“Working with communities, I advocate with funders to involve community members as authors of their own results of the work. I engage them in discussions of how it is important to change the paradigm from reporting and dissemination that keep the power, to telling the story of the work in the hands of others (describe what ‘they’ did), to moving toward agency in telling their own story (describe what ‘we’ did). So, my evaluation reporting always includes those doing the actual work. I encourage funders to send those folks to present at conferences at least alongside myself as ‘evaluator,’ but they are given the spotlight to share the results of their work.”*

Thirty-five percent of respondents identified that evaluation clients do not request or want CRE approaches, and 26% stated that stakeholders do not buy into CRE. When providing more detail of the barriers they encountered, one survey respondent stated that they work in a sector that has a colorblind culture and lacks self-awareness of how their collective actions perpetuate injustice. They noted, *“I work in a sector that can’t even have healthy discussions of race/ethnicity. They can celebrate diversity, if they notice it. They would say everyone is the same, and we should treat people all the same. They will have uncomfortable discussions about race but never change their program as a result of racial disparities or evaluation data. The evaluation does respond to ‘culture,’ but it’s their ‘culture’ that drives the evaluation, which simply perpetuates the status quo.”*



CRUCIAL RECOMMENDATIONS

The four recommendations listed below emerged from the survey data, data parties, and our collective expertise. The responses from the survey data demonstrate a crucial and significant need for change in evaluation practices. We highlight four key recommendations:

1. **Funders must require a Culturally Responsive Evaluation (and/or similar approach, such as Feminist or Emancipatory Evaluation) to advance social justice. Otherwise, grantmakers will continue to perpetuate inequities.** When asked why CRE is such a challenge, the most frequent response (39%) was that funders (especially federal or governmental agencies) do not request or want CRE. Evaluation proposals are written to address the funders' evaluation preferences; thus, few proposals will develop a CRE approach without some acknowledgement of the funders' support for this approach. Funders should value CRE and what it can bring to the learning process and effectiveness of a program or policy intervention. In line with national funders, such as Annie E. Casey, Wisconsin-based grantmakers as well as grantmakers providing financial resources to Wisconsin can:
 - a. vet the evaluator's portfolio for authentic and substantive structural competence, cultural responsiveness, anti-oppression, and social justice application. Each of these aspects make evaluations stronger;
 - b. build internal organization capacity through anti-racist, anti-oppression trainings to build capacity to assess "authentic and substantive" cultural, structural, and anti-oppressive competence in evaluation applications and processes;
 - c. ask evaluators to assess whether White supremacy shapes the funder's portfolio, specifically grantee strategies and outcomes. Alter any practices that are inconsistent with social justice and/or perpetuate inequality;
 - d. require evaluators to explicitly address how their methodology does not perpetuate White supremacy, and do not accept any evaluation report that excludes this vital information;
 - e. market and conduct outreach to a diverse set of evaluators rather than just the usual suspects whenever evaluation services are needed³;
 - f. support evaluation mentorship programs especially for evaluators from underrepresented backgrounds; and
 - g. ensure that the final list of evaluators interviewed is diverse. Reward teams with longheld and existing racial/ethnic composition and lived experience.

2. **AEA local affiliates, academia⁴, conferences, convenings, and other capacity-building engagements that teach evaluation must explore the authentic application of CRE and related social justice principles.** Only 37% of the survey respondents had applied CRE to their evaluation practice, and the survey revealed significant gaps in skills. Whether it is an undergraduate student, a practitioner new to evaluation attending a seminar, or a seasoned evaluator attending a staff meeting, everyone who teaches evaluation is responsible for implementing this recommendation. Specifically, we ask educators, trainers, presenters/lecturers, and capacity-builders to
 - a. train evaluators in conflict management and how to productively name racist and exploitive policies, programs, activities, and organizational practices in a way that promotes positive organizational change (also see Thomas et al., 2018);
 - b. train evaluation institutions to identify and address organizational bias and blind spots in how data and knowledge is constructed; and
 - c. explicitly cover emancipation, colonialism, liberation, Critical Race Theory, immigration, Black feminism, Feminist Theory, Native American and Indigenous epistemologies, LGBTQIA+ theory, White fragility, as well as other literature written by authors of color to allow for a nuanced, deep discussion on social justice.

³ Non-profit and government leaders can act on these recommendations as well.

⁴ We tried to survey 2-year and 4-year evaluation instructors on whether they included CRE but had a low response rate across the state (just four respondents).

- 3. Educators, trainers, and capacity-builders must do their due diligence to accurately convey high standards for CRE and related principles. Likewise, when transformative and justice frameworks are mainstreamed, they can lose their meaning as they become reduced to “simple tasks” rather than transformational practices.** We fear that as CRE becomes popular, it will be watered down, appropriated, or co-opted. The need for high standards was apparent in the survey. One data party participant described the necessary commitment, stating, “An hour every couple of months isn’t going to make an impact. If we are serious about CRE, we need to show it by making more time for it. Without more frequent opportunities to meet, talk and share, we won’t make progress, and our efforts will stagnate. More frequent meetings allow for the opportunity to bring more people to the table and to continue a conversation about actually putting CRE into action.” Another stated, “Creating stronger expectations around minimal cultural competency might be valuable. Two years of continuous, structured, and skillfully facilitated equity-focused work should be suggested as the standard duration for cultural competency training.” Evaluators need to think of this work as a journey that requires a significant investment of time and effort.

CRE and other social justice evaluation approaches are in danger of being watered down, *APPROPRIATED*, or co-opted. We must protect against this and hold true to the liberating tenets of these approaches.

- 4. Evaluation entities must implement policies that require the incorporation of people with lived experience throughout the evaluation process; this includes evaluators of color and other underrepresented groups (e.g., low-income, LGBTQIA+, non-college enrolled, Indigenous, rural, lay, youth, Spanish-speaking).** Without this engagement, power will continue to be reserved for and held by privileged individuals, and the community will continue to be removed from the decision-making that affects its own environment and future. There are many standards of practice that organizations can implement to create change in the evaluation practice toward CRE. One survey respondent described how they systematically review indicators and measures to ensure that they do not perpetuate stereotypes but instead consider the political and ethical implications from a social justice lens. Other suggestions include:
- generating learning spaces throughout the evaluation project for evaluators of color, White evaluators, and stakeholders to learn together, share resources, and expertly mentor and challenge each other;
 - requiring partnership with organizations who have lived experience with the proposed population(s);
 - conducting participatory approaches that include group development of evaluation questions, data parties for analysis, and reporting with community members;
 - ensuring that community members benefit from the evaluation process (e.g., salaries, \$100/hour rate stipends for their involvement);
 - creating talking points and other templates to help influence clients and stakeholders to conduct CRE; and
 - clearly delineating the amazing results that can occur with CRE compared to other styles of evaluation and hold partners accountable for any harm caused by evaluation results.

In addition to the recommendations highlighted above, evaluation firms should develop diversity, equity, and inclusion plans, **set goals to promote more evaluators of color and from underrepresented groups in the next five years, and develop mechanisms for tracking progress.** Survey respondents stated that members of the evaluation team were reflective of the communities or population(s) of focus in the evaluation less than half of the time (average = 2.80 on a 1 to 5 scale). The most frequently cited challenge to survey respondents was ensuring that persons in charge of the evaluation have shared/lived experiences with the population(s) of focus in the evaluation (41%). One data party participant reflected, “We need to do a better job of making the hiring process more open and inclusive and evaluate ourselves. We should track the demographics of who applies, who gets an interview, and who gets offered a position. In addition, we need to ensure that those who serve on hiring committees have had training regarding implicit bias.”

A significant infrastructure gap that will impact this recommendation is the need for more evaluation mentors of color and with lived experience who have experience running their own firms. Beyond hiring, promotion should also mean that the evaluator can manage bigger evaluation budgets (\$100K to \$1 Million) and more complex evaluations with larger “big data” datasets as well as potentially open and run their own firm within another 5 to 7 years.

CONCLUSION

This survey highlighted exclusion entrenched in the systems within the field of evaluation.

As the opening quote stated, “**...how will things ever change? This is embedded in the systems and institutions of education, policy, procurement, political, and monetary practices.**” We must change how evaluation is conducted across many institutions (philanthropy, academia, evaluation-focused organizations, and field-specific professional organizations) and sectors. These results offer a compelling call for a review of the composition of evaluation teams and organizational missions. Without improvements, evaluation will continue to contribute to the vast disparities in opportunity and outcomes in our state. Alternatively, if the field of evaluation rallies together to learn, implement new skills, and critically advocate for Culturally Responsive Evaluation approaches, the field can advance a renewed agenda for social justice. While we focused on Wisconsin, we encourage other local affiliates to reflect on the practices within their own state and their integral role in change. We plan to use the results to design future capacity-building programs.

Inequitable practices in evaluation cannot be tolerated as the impact of such practices are widespread and significant. Inequities within the evaluation field are rooted in power inequities and are perpetuated by the actions and silence of individuals with privileged identities. To create the seismic shift that needs to occur in Wisconsin, advocates of CRE must step up to influence the people in power and organize community members to authentically engage in the evaluation processes. The current evaluation infrastructure and the standards upheld by funders and other stakeholders (as reported in this survey) have resulted in wide gaps in the use of CRE and its related principles, most notably in the inconsistent representation within evaluation teams and the low number of evaluators with the skills to take on anti-oppression work.

REFERENCES

- American Evaluation Association. (2011). *Public Statement on Cultural Competence in Evaluation*, Fairhaven, MA. <https://www.eval.org/ccstatement>
- Franz, N. K. (2013). The data party: Involving stakeholders in meaningful data analysis. *The Journal of Extension*, 51, 1-3.
- Hood, S., Hopson, R. K., & Kirkhart, K. E. (2015). *Culturally Responsive Evaluation Theory, Practice, and Future Implications*. In K. E. Newcomer, H. P. Hatry, & J. S. Wholey, *Handbook of Practical Program Evaluation* (pp. 281-317). San Francisco: Jossey Wiley & Sons.
- Metzl, J. M. (2012). Structural competency. *American Quarterly*, 64(2), 213-218. doi: 10.1016/j.socscimed.2013.06.032
- Zuberi, T., & Bonilla-Silva, Eduardo. (2008). *White logic, white methods: Racism and methodology*. Lanham: Rowman & Littlefield.
- Public Policy Associates, Inc. (2015). *Is My Evaluation Practice Culturally Responsive?* Lansing, MI: Public Policy Associates, Inc.
- Thomas, V. G., Madison, A., Rockcliffe, F., DeLaine, K., & McDonald Lowe, S. (2018). Racism, social programming, and evaluation: Where do we go from here? *American Journal of Evaluation*, 39(4), 514-526.
- University of California, Berkley. (n.d.). *Social Welfare Berkeley*. From <https://socialwelfare.berkeley.edu/social-justice-symposium-about>

APPENDIX 1: METHODS

As described in this report, iMilwaukee Evaluation!, Inc. works on multiple projects, using a collaborative approach to achieve a better result. We were intentional about engaging many pockets of the community, including iMilwaukee Evaluation! members, American Evaluation Association members, and local evaluators to gather feedback, build interest, and develop leadership and capacity. This engagement served to sustain the impact of this work to build a movement around the report's findings.

Items

The survey was developed in several stages. In the first stage, iMilwaukee Evaluation! crafted questions and discussed options internally. Several blocks of survey questions were informed by the self-assessment *“Is My Evaluation Culturally Responsive?”*⁵ by Public Policy Associates (2015). The board also discussed content validity and how to gather truthful responses in the hopes of minimizing social desirability effects. We decided to provide anonymity, requested honesty, and cautioned against socially desirable responses in our survey introduction.

In the next stage, we garnered feedback and guidance from local and national leaders in evaluation, including Kathy Newcomer, former AEA President, Cindy Crusto, Yale Faculty and a member of the American Evaluation Association Cultural Competence in Evaluation Task Force, and Michelle Robinson, formerly with Kids Forward. We incorporated their feedback in subsequent additions and discussed large changes as a board (e.g., improvements to the survey scales). After all iterations, we piloted the survey link with board members for a final review.

This process culminated in 35 survey items. Twenty-three items were multiple choice (e.g., familiarity with CRE, the extent to which the evaluator has reviewed their own biases), and five were open-ended (e.g., “provide an example of how you have avoided reinforcing cultural stereotypes and prejudice in your work”). Seven additional questions gathered demographic information.

Distribution

The survey was distributed through the software Qualtrics, using an anonymous link. The survey invitation was sent out in October of 2017, using iMilwaukee Evaluation!'s listserv and social media contact lists. The invitation email was also sent directly to more than 15 evaluation network managers, requesting them to forward it to their networks to widen the survey's reach. As the results came in, we tracked demographics to guide additional outreach. We sent additional reminder requests to increase survey respondents who identify as non-binary/third gender or male, people of color, people in locations other than Madison, and those in sectors outside of academia. Two official reminders were sent via iMilwaukee Evaluation!'s listserv seven and six days later, respectively. Follow-up emails were sent again to network managers or leaders, asking them to share with their networks. After reporting to board members with the initial results, we sent one final request for participation in our December 2017 newsletter. We received 65 responses, with the final response recorded on December 21, 2017.

Participatory and Collaborative Data Analysis and Interpretation

We used a **multi-stage, iterative process** to analyze and interpret the survey data.

In the **first stage (initial exploration)**, we ran descriptive statistics using MS Excel to explore quantitative data. We also used MS Excel to store and perform content analysis on the qualitative data generated from open-ended answers. This data was transformed

⁵ This tool was created to assess evaluation services for diversity, inclusion, and equity, and it was featured in a 4-part webinar series hosted by iMilwaukee Evaluation! Inc. and Public Policy Associates, Inc.

into data placemats used at two data parties, along with an initial presentation at a local academic evaluation community of practice, to explore the data.

In the **second stage (data interpretation)**, we facilitated two participatory data analysis sessions in the fall of 2018, attended by 28 people (combined total; see Figure 10 for Demographic Information for the Survey and Data Party).

Demographic Information for the Survey and Data Party				
	Survey Participants (n = 54)		Data Party Participants (n = 28)	
	n	%	n	%
Gender				
Female	42	78	20	72
Male	6	11	6	21
Non-binary/Third Gender	1	2	0	0
Gender Fluid	1	2	0	0
No Response	4	7	2	7
Age¹	n	%	n	%
22-29	13	24	--	--
30-39	19	35	--	--
40-49	9	17	--	--
50-64	7	13	--	--
65+	1	2	--	--
No Response	5	9	--	--
Race/Ethnicity²	n	%	n	%
People of color (all races/ethnicities)	21	39	10	36
White	33	61	18	64
Black or African American	8	15	4	14
American Indian or Alaska Native & White	2	4	0	0
Hispanic or Latino	2	4	0	0
Asian	1	2	2	7
Asian & Other	0	0	1	4
Black or African American & Hispanic or Latino	1	2	0	0
Black or African American & Other	1	2	1	4
Black or African American & White	1	2	0	0
No Response	5	9	2	7

Organizational Sector	<i>n</i>	%	<i>n</i>	%
Academia/Higher Education	27	50	12	43
Community Non-profit	8	15	2	7
Consulting/Private Sector	4	7	2	7
Government (e.g., health department)	4	7	5	18
Foundation or Funder	3	6	1	4
K-12 Education	2	4	0	0
No Response	6	11	2	7
Wisconsin Work Location	<i>n</i>	%	<i>n</i>	%
Madison	28	52	21	75
Milwaukee	10	19	4	14
Multiple Cities	3	6	0	0
Southeast WI	2	4	0	0
Eau Claire	1	2	0	0
Menomonie	1	2	0	0
Chicago IL	0	0	1	4
No Response	9	17	2	7
Length of Time Conducting Evaluation-Related Work	<i>n</i>	%	<i>n</i>	%
Less than One Year	4	7	3	11
1-2 Years	11	20	2	7
3-5 Years	8	15	8	29
6-10 Years	12	22	5	18
11-15 Years	6	11	3	11
16+ Years	8	15	5	18
No Response	5	9	2	7
Evaluator Identity	<i>n</i>	%	<i>n</i>	%
Yes, if someone asks what I do, I say I'm an evaluator.	29	54	18	64
Not primarily. I conduct evaluation-related work, but it's not my primary job.	20	37	7	25
Other Responses: "In the process of learning more" and "Still in school so too soon to tell"	1	2	1	4
No Response	4	7	2	7
Had Formal Training in Cultural Competence	<i>n</i>	%	<i>n</i>	%
Yes	32	59	17	61
No	17	31	9	32
No Response	5	9	2	7

Figure 10. Demographic Data: Survey Participants and Data Party Participants.

¹ Age was unintentionally left out of the registration survey for the data party.

² To offer the respondents a more accurate representation of their race, they could choose all applicable races/ethnicities instead of just one category.

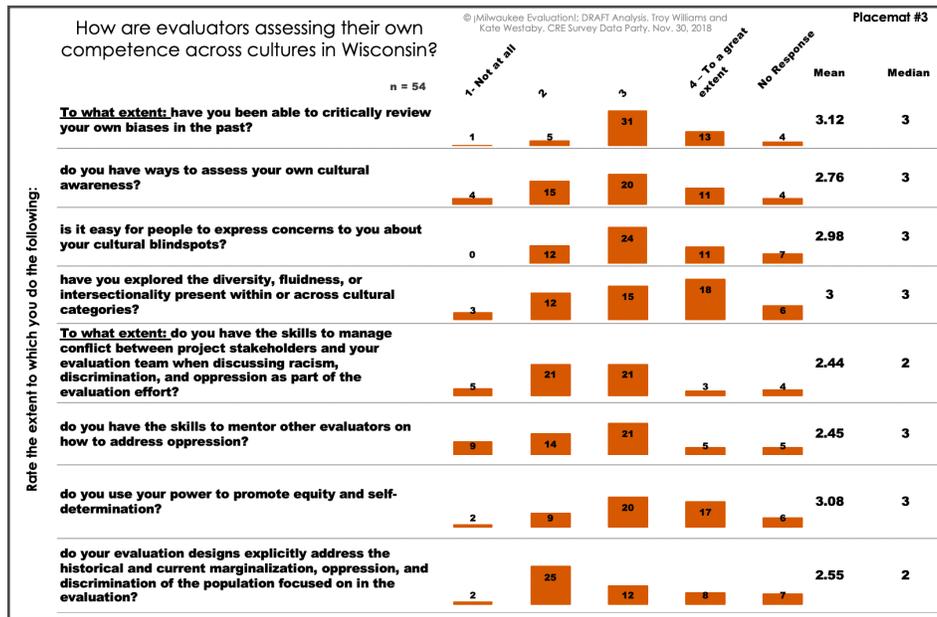


Figure 11. An example of one 8.5"x11" data placemat used to prompt small group discussion regarding the Culturally Responsive Evaluation Survey data.

We began the data parties (Franz, 2013) by introducing the survey project goals and shared agreements. We were concerned about White fragility creating discord and disagreement (e.g., participants voicing defensive statements that would derail truthful dialogue and focus the attention on “appeasing” White participants). To address this, we asked participants to approve a community agreement that included values such as respect and encouraged participants to use “I” statements in their remarks. We subscribed to a shared agreement that all participants did not have to be on the same page at the end of the data party, which we hoped would lessen the need for uniform responses.

To allow for individual differences in processing times when reviewing each new placemat, we asked the respondents to quietly and individually write down their thoughts on an index card. They were asked to reflect on the question at the top of the placemat (“How are evaluators assessing their own cultural competence?” and “What are your recommendations for improving evaluation practices in Wisconsin?”). After the individual assessments, each table discussed their observations as a small group. This allowed participants to play off of each other’s ideas about the data. Participants sat at tables of 4-6 individuals (see Figure 12).



Figure 12. Participants at one data session discussing their recommendations while reviewing the data placemats.

To ensure that we had feedback on all the placemats, each table was asked to start on a different placemat and review up to four of the nine placemats. Appointing table leaders ensured that the tables continued to progress to additional data placemats and that we captured the themes from each group's discussion. The table leaders had been provided information about the meeting process and the placemats ahead of the data party. Index cards and notes were gathered at the event, or table leaders later emailed them to the facilitators.

After the small group discussion portion of the data party, the entire data party group reconvened to discuss the overall themes that had emerged from their conversations. We wanted to encourage individuals to voice any overarching thoughts they or their group had regarding the data.

In the third and final stage (extended interpretation), we conducted additional analysis. We conducted cross-tabulations, comparing the results between the evaluators of color and White evaluators, and between new evaluators and senior evaluators. We conducted a closer examination of qualitative data in the context of quantitative data (and vice versa). We also learned a great deal from our presentations at two conferences (the 2018 Wisconsin Public Health Association, Green Bay, WI and the 2018 Visitor Studies Association Conference, Chicago, IL) due to audience feedback (e.g., resources to avoid tokenization, how large-scale associations are thinking about CRE integration).

Respondent Demographics

In total, 65 evaluators or individuals who conduct evaluation-related work responded to the survey. Since ¡Milwaukee Evaluation! serves Wisconsin, the analysis focused on the 54 individuals whom we were able to identify as located in Wisconsin. Figure 10 displays the demographic breakdowns of the survey and data party participants. It should be noted that 54% of the respondents identified as evaluators, while the remaining respondents indicated that evaluation was part of their work. The survey sample was mostly female, White, and located in the southeastern part of the state. People of color represented 40% of the survey sample. The sample was split in several important ways: about half work within academia, and the other half work in a variety of settings from government to for-profit and non-profit. About half of the respondents are 40 years of age or less, and the other half are 40+ years of age. Slightly more than half (51%) have six or more years of evaluation experience, and just over half (54%) identify as evaluators.

iMilwaukee Evaluation!

BORN IN MILWAUKEE – SERVING THE STATE

AEA
AFFILIATE

Email: Milwaukeeevaluation@gmail.com

Web: evaluation.wildapricot.org

BEING RESPONSIVE:

The First Assessment of Culturally
Responsive Evaluation in Wisconsin:
Findings from the 2017 Survey

FALL 2019