Setting Context: From Diversity to Equity

National Assembly of State Arts Agencies (NASAA) Annual Conference 2017 Professional Development Institute

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PART I.

Introductions, Purpose of the Workshop, Setting the Stage

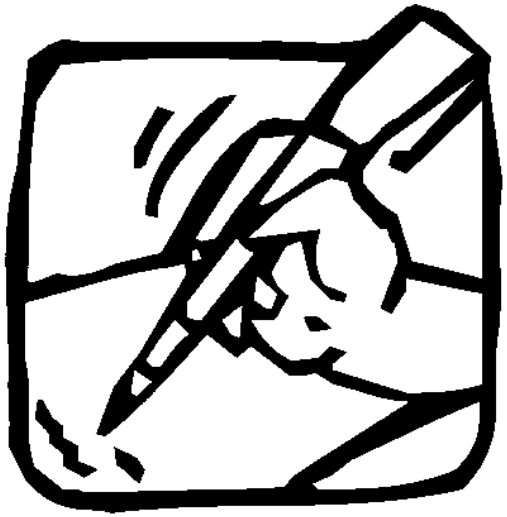
Acknowledgements

- NASAA Professional Development planning team

- Collaborative work from lectures, co-presentations, research grants, published papers:
  - National Science Foundation
  - American Evaluation Association
  - CDC/AEA Summer Institute
  - Aotearoa New Zealand Evaluation Association
  - Culturally Responsive Evaluation Assessment (CREA)
  - Many other CRE practitioners

Layout and Format of Workshop

- Interactive
  - Opportunities to practice ways of speaking and thinking, challenging workshop issues
- Reflective
  - Opportunities to think about these workshop issues over the next three hours.
- Prospective
  - Opportunities to think about workshop issues further and work with presenters as interested



AGENDA

Part I. 2:30 – 2:40 p.m.
Introductions and Purpose of the Workshop

Part II. 2:40 – 3:30 p.m.
Equity and Evaluation

BREAK 3:30 – 3:40 p.m.

Part III. 3:50 – 4:40 p.m.
Culturally Responsive Evaluation: A Strategy to Facilitate Equity in the Arts

BREAK 4:40 – 4:50 p.m.

Part IV. 5:00 – 5:20 p.m.
Putting Learning into Action

Part V. 5:20 – 5:30 p.m.
Workshop Wrap-up

Learning Objectives:

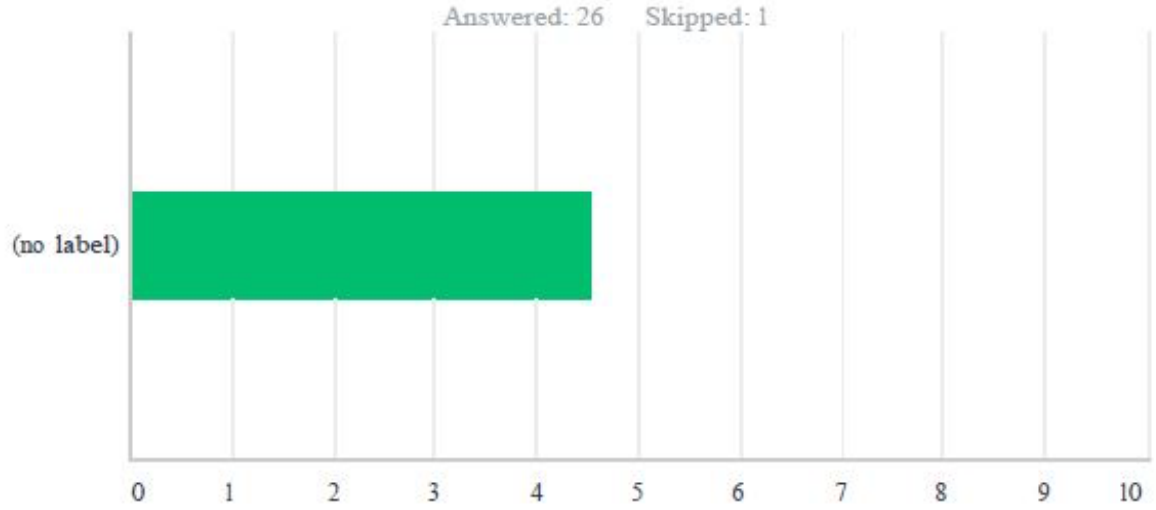
How can state arts agencies and state education agencies leverage existing or potential data to define and address equity gaps in state level arts education policy and practice?

- Recognize the relevance and value added of using an equity lens in program-related evaluation and data collection
- Discuss the evaluation process in the context of working with underserved communities, in particular
- Identify strategies for assisting agencies and evaluators in becoming culturally responsive
- Understand how to gather arts education data with increased cultural literacy, competence and responsiveness
- Understand the basics of putting data into action to address equity gaps in arts education

Introductions in 5 Minutes!

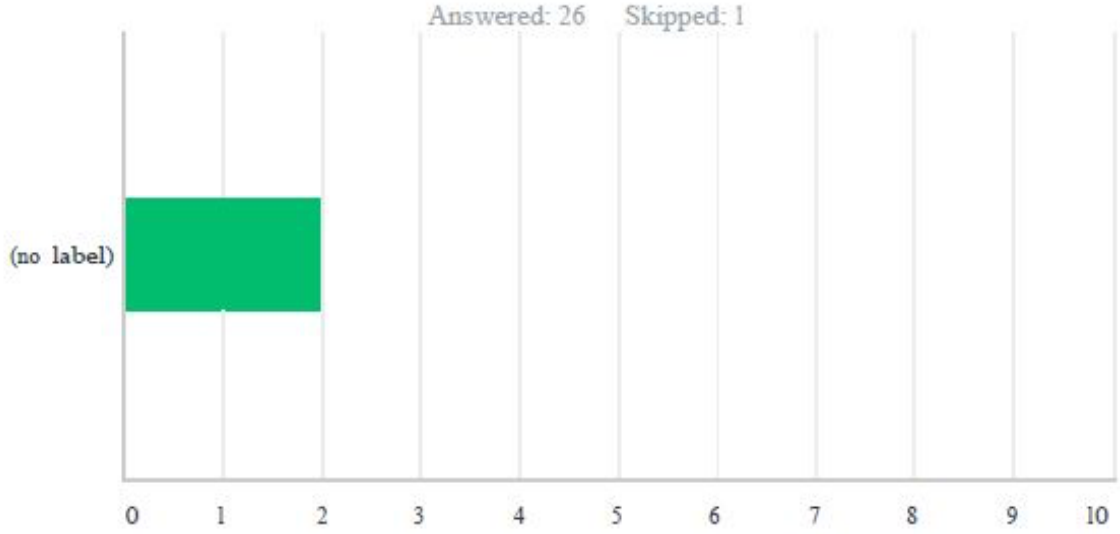
- Name
- Institution
- Experience w/ equity in evaluation
  - Workshop Facilitation Team provides some results from the survey.

Q6 How interested are you in understanding and/or addressing unequal access to arts education?



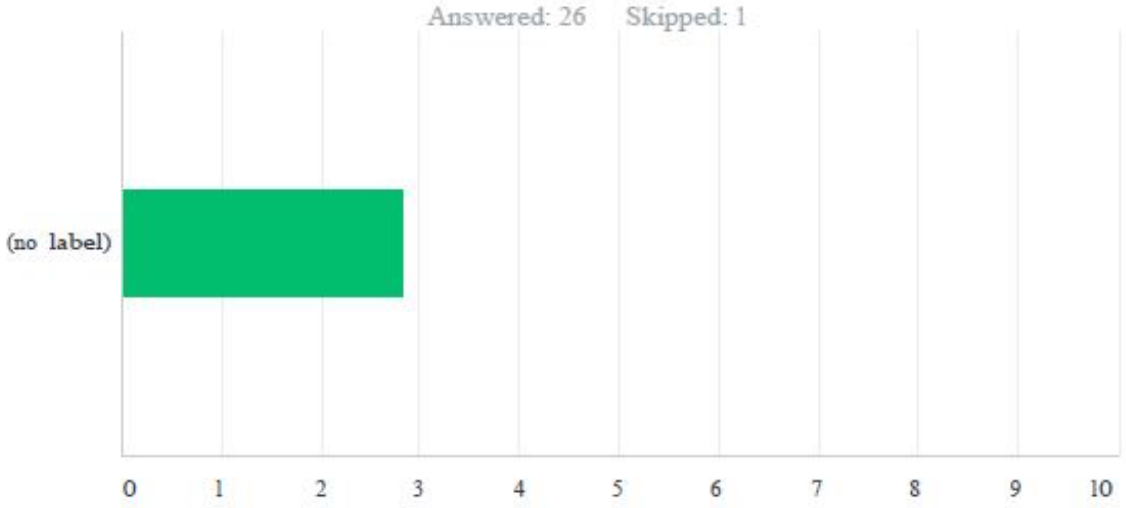
	1 - None at all	2 - A little	3 - Somewhat	4 - Very	5 - Extremely	Total	Weighted Average
(no label)	0.00% 0	0.00% 0	3.85% 1	38.46% 10	57.69% 15	26	4.54

Q10 Please rate your knowledge of culturally responsive practices in evaluation (CRE):



	1 - None at all	2 - A little	3 - Some	4 - A lot	5- Expert	Total	Weighted Average
(no label)	30.77% 8	38.46% 10	26.92% 7	3.85% 1	0.00% 0	26	2.04

Q14 Please choose the extent to which you agree with the following statement: I feel confident in my ability to collect data that accurately represents the populations with which I work.



	1 - Not at all	2 - A little	3 - Somewhat	4 - Mostly	5 - Completely	Total	Weighted Average
(no label)	11.54% 3	15.38% 4	53.85% 14	19.23% 5	0.00% 0	26	2.81

Culture and Biases

(1) What questions an evaluator asks and ultimately does not ask

(2) What an evaluator illuminates and ultimately minimizes

(3) What evaluation approach is used and ultimately not used

(4) What data are collected and ultimately overlooked

(5) How interpretations are made and whose interpretations are held in high or low esteem

(6) What conclusions are drawn and what conclusions are not considered

(7) How results are presented and to whom such results are disseminated.

Thomas and McKie (2006)

Evaluation vs. Research vs. Assessment

Evaluation	Research	Assessment
• Merit, worth or significance of an evaluand	• Is systematic study directed toward greater knowledge or understanding fundamental aspects of phenomena and observable facts	• Is an extension of evaluation but evaluation is much more systematic than assessment

General types of evaluation

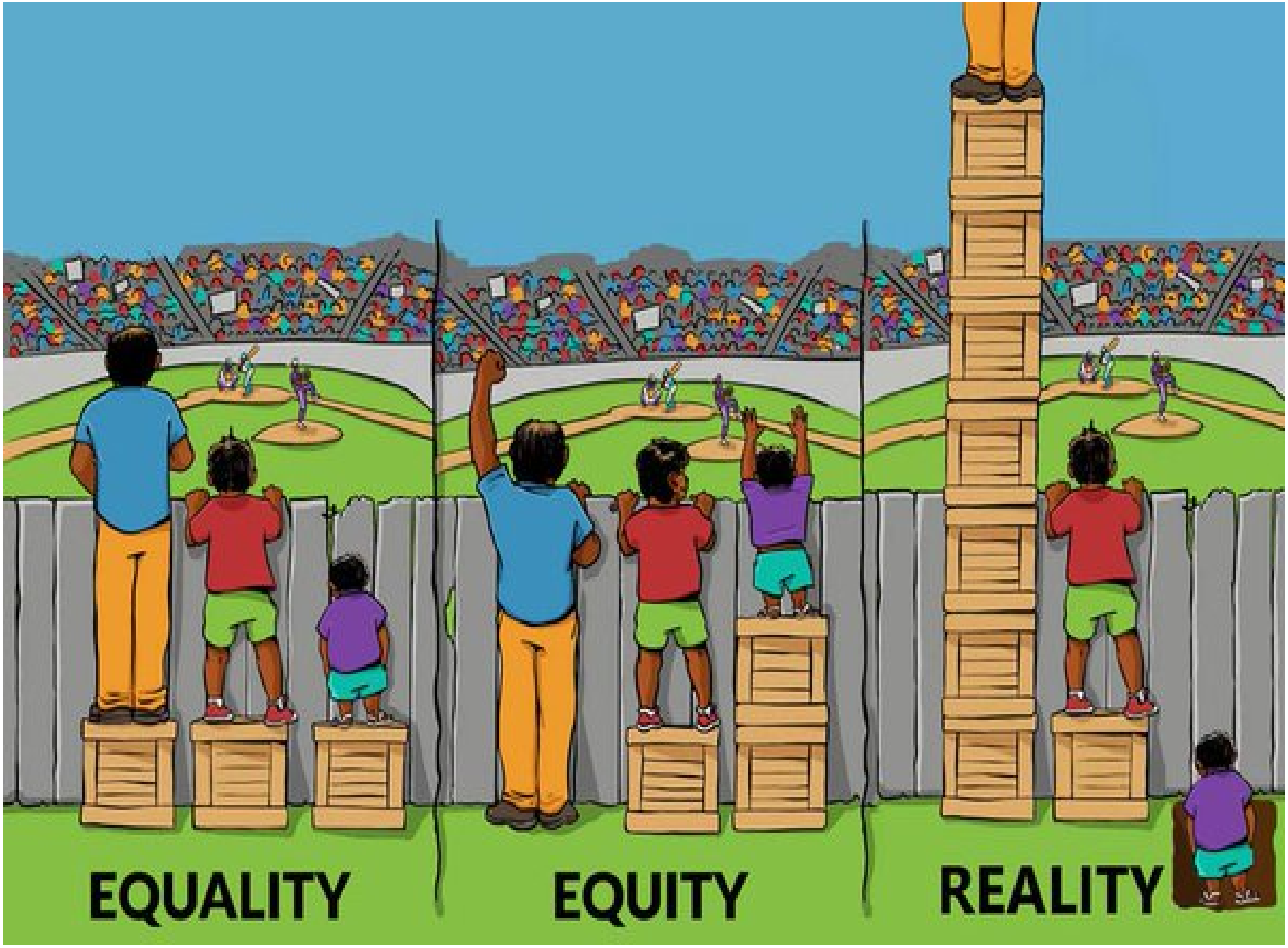
Formative Evaluations

Summative Evaluations

Mertens, D., & Wilson, A. (2012).

PART II.

Equity and Evaluation


EQUALITY
EQUITY
REALITY

What Is (Social)Equity?

- *Social equity is fairness in the delivery of public services; It is egalitarianism in action – the principle that each citizen regardless of economic resources or personal traits deserves and has a right to be given equal treatment by the political system.*

Mandating (Social) Equity

- *There is a long tradition of government [for example] forcing private organizations to better treat their employees.*
- *Better treatment was inhibited by social Darwinism – the concept of biological evolution applied by others to the development of human social organization and economic policy.*

Equity in the Transformative (Social Justice) Paradigm

- **Axiology:** Respect for cultural norms; support for human rights and social justice
- **Ontology:** Rejects cultural relativism. Recognizes privilege given to what is perceived to be real based on: social, political, cultural, economic, ethnic, gender, and disability positionality
- **Epistemology**: Interactive link; knowledge is socially and historically located; trusting relationship
- **Methodology:** Qualitative/dialogic; Quantitative mix; Context

Equity in Evaluation

"A judgment made of the relevance, effectiveness, efficiency, impact, and sustainability – and, in humanitarian settings, coverage, connectedness, and coherence – of policies, programs, and projects concerned with achieving equitable development results.

It involves a rigorous, systematic, and objective process in the design, analysis, and interpretation of information in order to answer specific questions, including those of concern to worst-off groups. It provides assessments of what works and what does not work to reduce inequity, and it highlights intended and unintended results for worst-off groups as well as the gap between best-off and worst-off groups.

It provides strategic lessons to guide decision-makers and to inform stakeholders. Equity-focused evaluations provide evidence-based information that is credible, reliable, and useful, enabling the timely incorporation of findings, recommendations, and lessons into the decision-making process. "

- Segone and Bamburger, 2011

Equity in the Arts: Participant Engagement

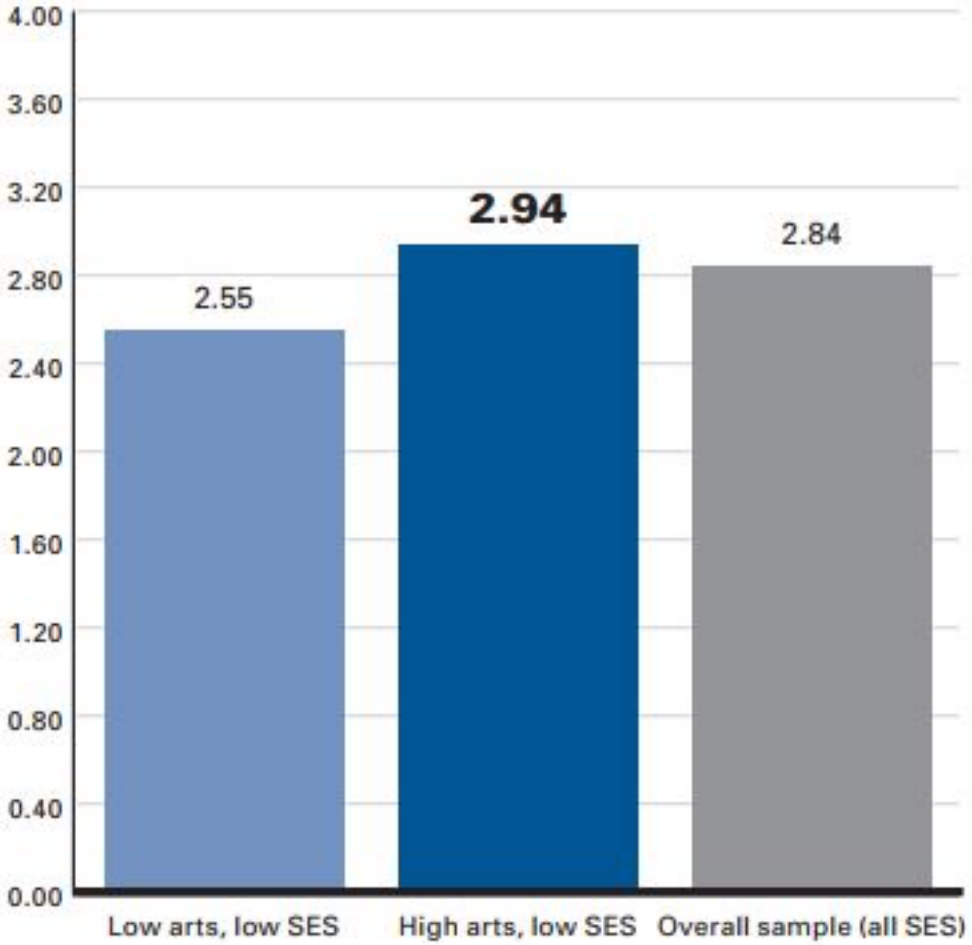
- **Discussion Point #1**
  - What are some of the issues that foster—or prevent—true equity in the arts?
    - At your tables, please take 5-7 minutes to discuss—we'll share some of the issues raised in your groups!

FIGURE 4

Percent of 18- to 24-year-olds who received any arts education in childhood, by race/ethnicity and SPPA year[7]

Source: 1982, 1992, 2002, and 2008 waves of the Survey of Public Participation in the Arts.

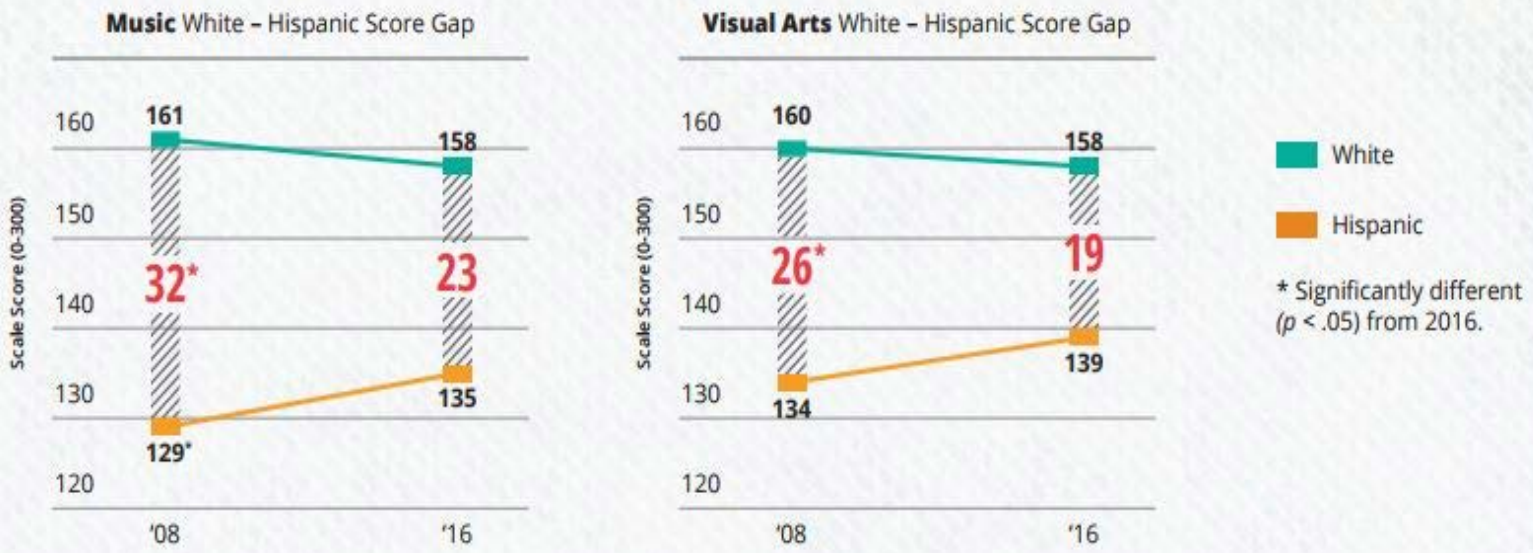
Mean GPA of High School Students (2005)
(on a four-point scale)



Source: NLSY97. From 1998, when participants were 13–17 years old, to 2005, when 69 percent of respondents to the initial wave of data collection (1997) had full transcript data available.

Note: Arts course credits from high school transcripts are the sole indicators of arts engagement in the NLSY97 database.

4 White – Hispanic Score Gap Decreased



Data in the Pursuit of Equity in the Arts: Participant Engagement

- **Discussion Point #2**
  - How has data been used, if at all in arts to establish equity in your organization? What would you like to use it for in your current context?
    - At your tables, please take 5-7 minutes to discuss—we'll share some of the issues raised in your groups!

PART III.

Culturally Responsive Evaluation: A Strategy to Facilitate Equity in the Arts

Thinking about Culture in Evaluation as a Path to Equity

Challenges for understanding evaluation in cultural context

"What has frustrated me in the ways multicultural programs have been evaluated is that the people who do the evaluation generally do not understand the nature of multicultural work...The evaluators and their evaluations often miss the point of what the program is about and use inappropriate standards on which to interpret the program on which to make value judgments" (Stockdill, 1992:17)

And its far-reaching implications…primary inclusion

"As Lincoln (1991) points out, most people who evaluate social programs know very little about the minority program participants' world view, the appropriateness of program interventions in meeting their needs, or programs' personal consequences for these clients (Madison, 1992).

..... generalization of methodologies in to all contexts

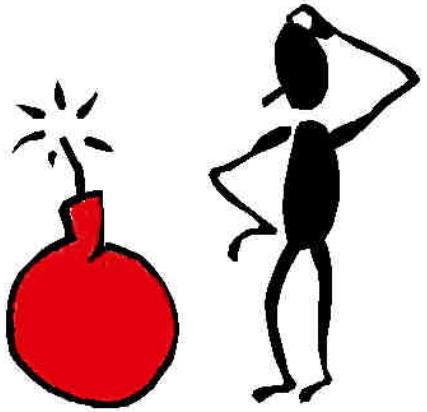
"...evaluators must exercise great caution in trying to apply the methodologies, models, and categories devised in and for the developed world in Third World countries...different views of reality and the nature of change lead to different assumptions about appropriate goals, treatment, and evaluation models (Cuthbert, 1985).

Challenges concerning the role of culture in evaluation

Evaluation as auditing versus examination of how useful and/or appropriate a certain program is for the local community

Difficulties understanding the population's ways of thinking, living, and understanding

Western ideas of what "should" happen become the default priority for organizations

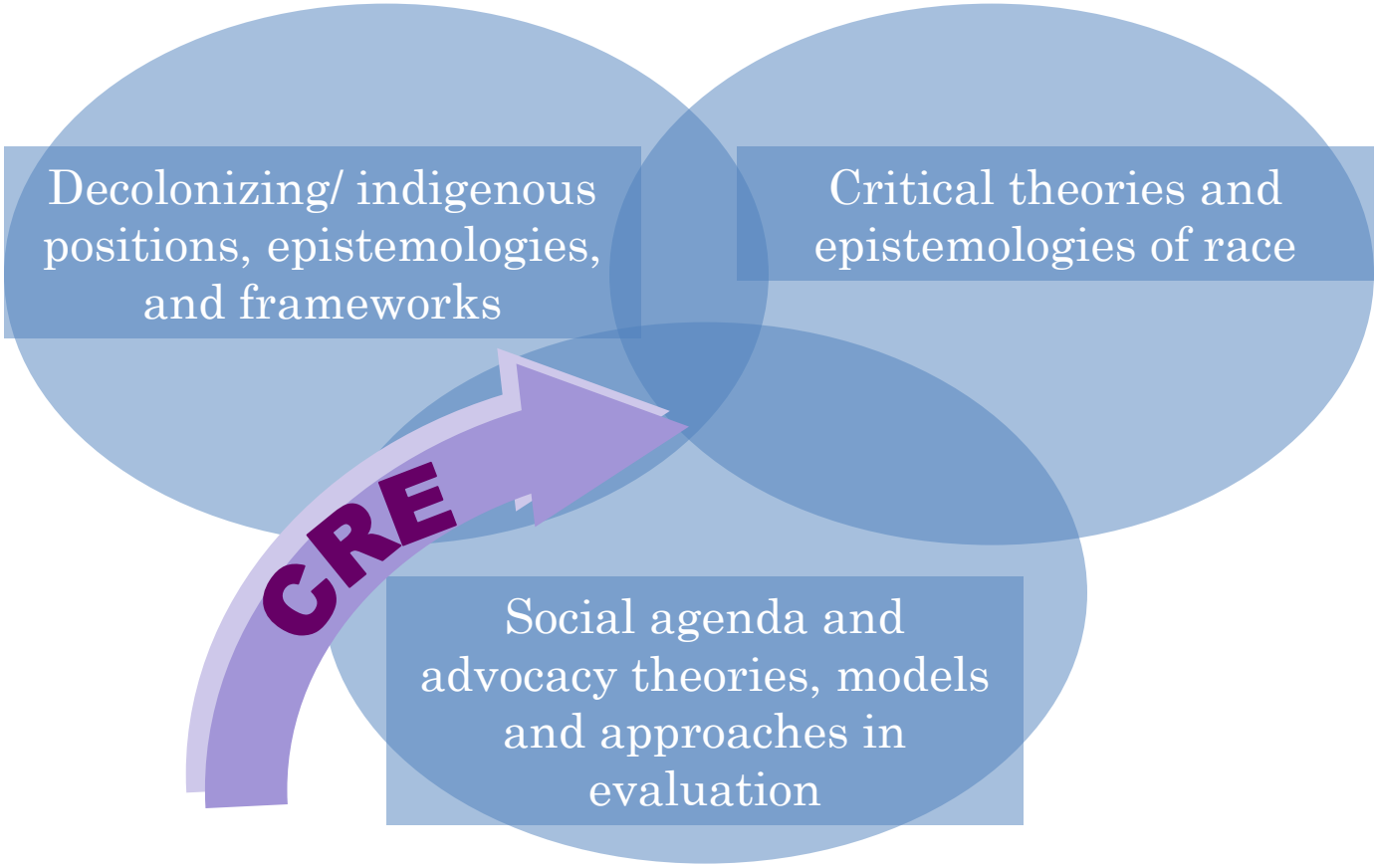


Basic Tenets & Components

- Social location of evaluator matters: lived experiences shape assumptions and frames of reference in evaluation process
- Evaluators play roles in furthering social change and justice: we are "more than technicians" but have duty to recognize power relations, challenge systems of inequity
- Avoiding ethnocentrism means embracing multiple cultural perspectives
- Culture is central to the evaluation process
- Culturally and ethnically diverse communities have contributions to make in redefining field of evaluation
  - (Hopson, 2003)

Being Culturally Responsive in Evaluation Practice

Theoretical and Practical Intersection of CRE: Advocacy, Race, Power



Hopson, 2009

Cultural Competence (c. 2011)

Cultural competence is a stance taken toward culture, not a discrete status or simple mastery of particular knowledge and skills. A culturally competent evaluator is prepared to engage with diverse segments of communities to include cultural and contextual dimensions important to the evaluation.

Public Statement on Cultural Competence in Evaluation
(American Evaluation Association, 2011)

Principles of Culturally Responsive Evaluation

Understand and recognize the larger context for programs or projects

- Research and learn about the cultural group
- Be aware of cultural labels and historical context
- Identify potential historical inaccuracies

Design evaluation with participants in mind

- Be culturally-specific in design
- Use a multifaceted approach and appropriate methods
- Collect data in culturally responsive ways

Allow for self-determination by stakeholders and program participants

- Engage directly with participants through discussion
- Engage stakeholders in general planning and in theory development

Casillas, Hopson, & Gomez (2015)

Principles of Culturally Responsive Evaluation

Build trust and facilitate communication

- Allow for representativeness
- Build diversity of organization/evaluation team
- Access diversity from external sources
- Being inclusive of diversity

Understand the evaluation audience and help the audience to understand the evaluation purpose and process

Make the evaluation accessible

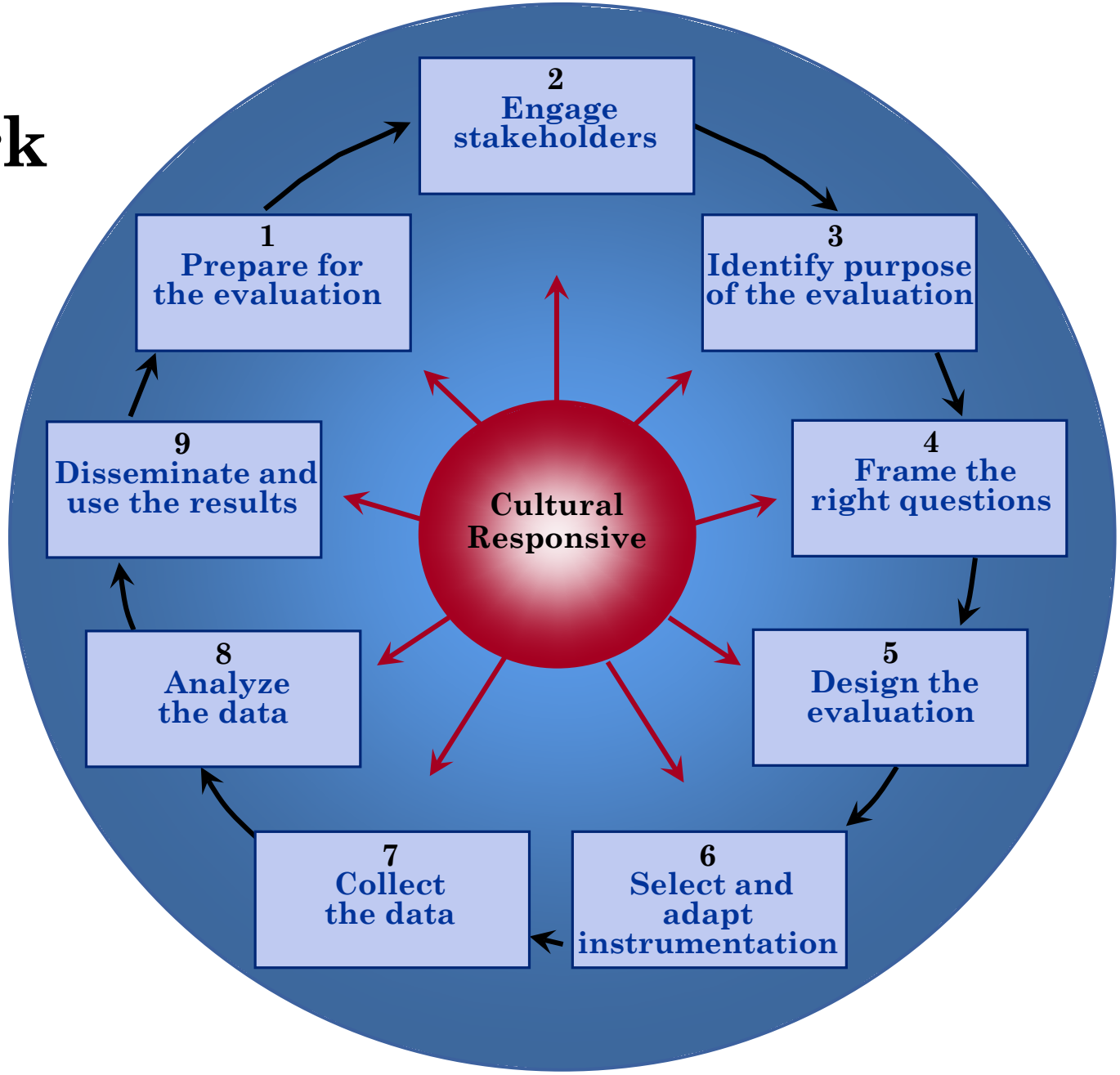
Understand evaluator attributes that may affect professional practice

Casillas, Hopson, & Gomez (2015)

PART IV.

Putting Learning into Action

CRE Framework



adapted from Frierson, et.al, 2010

1 Prepare for the Evaluation

- Be informed by the sociocultural context of the evaluand, including
  - *History*
  - *Formal and informal power relationships*
  - *Communication and relational styles*

  How: Informant interviews, group discussions, feedback sessions

- Assemble an evaluation team whose collective lived experience fits the context of the evaluand.
  - *Evaluator awareness of own cultural values, assumptions, prejudices, stereotypes*
  - *Not merely about matching demographics*

  How: Multi-ethnic, informants, interpreters, cultural guides, "critical friends of the evaluation"

2 Engage Stakeholders

- Develop a stakeholder group representative of the population served by program.
- Seek to include persons impacted by the program directly and indirectly.
- Pay attention to issues of power, status and social class.
- Include multiple voices in meaningful preparation process and activities.
- Create climate of trust, respect.

How: Create Stakeholder Map (handout)

3 Identify Evaluation Purpose(s)

- Document, examine program implementation
  - *How well is the program connecting with its intended consumers?*
  - *Is the program operating in ways that are respectful of cultural context?*
  - *Are program resources equitably distributed?*
- Document, examine progress toward goals
  - *Who is benefiting from the program, and are these benefits equitably distributed? Who is burdened by the program?*
  - *Is program theory culturally sensitive?*
- Evaluate overall effectiveness
  - *Capture cultural nuances*
  - *Examine correlates of participant outcomes*

Applying Stages 1 - 3

	Typical evaluation activities	Culturally responsive activities	Options for implementing CRE behaviors
Engage Stakeholders	Prepare for evaluation	Analyze context	Informant interviews Group discussions Feedback sessions
		Explore communication styles	
		Consensus on evaluation purpose	Gain trust
			Facilitate stakeholder ownership of the evaluation
		Assemble evaluation team	Multi-ethnic Shared lived experiences
		Acquire foundational knowledge	Informants Interpreters Cultural guides "critical friends of the evaluation"
	Identify purpose of the evaluation	Process evaluation	Examine program theory for cultural sensitivity
		Progress evaluation	Examine appropriateness of program goals for population
		Summative evaluation	Determine the effects of program implementation on participants

Derived from Frierson, Hood, Hughes, and Thomas (2010)

Example #1: Ensuring Parental Engagement in Charlotte North Carolina's North Corridor

- Step1. Preparing of the Evaluation
  - History, power relationship
- Step. 2. Engaging the Stakeholders
  - Developed opportunities for all stakeholders to participate (e.g., community forums, etc.)
- Step 3. Identifying the Purpose of the Evaluation
  - Early documentation of the program results, demographics, etc.

4 Frame the Right Questions

- Questions of relevance to significant stakeholders
- Determine what will be accepted as evidence
- Notice whose voices are heard in the choice of questions and evidence.

How: Reflect on how questions limit what can be learned and how they might be posed differently.

- Notice how different questions may expand understanding. Revise and refine questions.
- Can questions be answered with available resources?

How: Is there another possible approach to take?

5 Design the Evaluation

- Build design appropriate to both evaluation questions and cultural context.

How: Seek culturally appropriate mixed methods, combining qualitative and quantitative approaches.

Try to collect data at multiple points in time, extending the time frame of the evaluation as needed.

- Construct control or comparison groups in ways that respect cultural context and values.

6 Select & Adapt Instrumentation

- Identify, develop or adapt instruments for the local context.
- Establish evidence of reliability and validity.
- Language and content of instruments should be culturally sensitive.
- Use best translation practices, validating both semantic and content equivalence.

How: Forward/backward (FBT)

Translation by committee (TBC)

Multiple forward translation (MFT)

- Norms must be appropriate to the group(s) involved in the program.

Applying Stages 4 - 6

	Typical evaluation activities	Culturally responsive activities	Options for implementing CRE behaviors
Engage Stakeholders	Frame the right questions	Determine appropriate type of evidence	
		Critically question evaluation questions	Does the question limit results of the evaluation?
			Is there another possible approach to take?
			How might different evaluation questions result in different understandings of the program?
	Design evaluation	Identify appropriate design	Mixed methods often yield best results
			Data collection at multiple time points
	Select/Adapt instruments	Decide to identify, develop, and/or adapt existing measures	
		Pilot test for appropriateness to population	
		Translate when necessary	Forward-backward translation
			Translation by committee
			Multiple forward translation
			Check instruments for semantic/content equivalence

Derived from Frierson, Hood, Hughes, and Thomas (2010)

Interactive Exercise: Brainstorm of the types of evaluation questions needed to ensure equity

Interactive Exercise #1:

- Brainstorm the types of evaluation questions needed to ensure equity in arts programming
  - At your tables, please take 5-7 minutes to do a quick brainstorm and put them on the post-it sheet of paper—we'll share some of the issues raised in your groups!

7 Collect the Data

- Procedures used to collect both qualitative and quantitative data must be responsive to cultural context.

How: storytelling, focus groups, chronicles, interviews

Nonverbal as well as verbal communications provide keys to understanding.

Train data collectors in culture as well as technical procedures, videotape and review

- Recognize how cultural identifications of the evaluation team affect what they can hear, observe.
- Shared lived experience provides optimal grounding for culturally-responsive data collection.

8 Analyze the Data

- Understanding cultural context is necessary for accurate interpretation.
- A cultural interpreter may be needed to capture nuances of meaning.
- Stakeholder review panels can more accurately capture the complexity of cultural context, supporting accurate interpretation.

How: Disaggregate data and cross-tabulate to examine diversity within groups.

- Examine outliers, especially successful ones.
- Remember that data are given voice by those who interpret them

How: Shared lived experience, shared language

9 Disseminate & Use the Results

- Cultural responsiveness increases both the truthfulness and utility of the results.
- Maximize community relevance of findings; invite review by community members prior to dissemination.
- Communication mechanisms must be culturally responsive.
- Inform a wide range of stakeholders.
- Make use consistent with the purpose of the evaluation.
- Consider community benefit and creating positive change.

Applying Stages 7 - 9

	Typical evaluation activities	Culturally responsive activities	Options for implementing CRE behaviors
Engage Stakeholders	Collect data	Qualitative	Storytelling
			Chronicles
			Parables
			Poetry
			Observation
			Interviews
			Focus groups
			Revisionist histories
		Quantitative	
		Training "people as instruments"	Know what is being said/observed
			Nonverbal Behaviors
			Videotaping and reviewing
	Analyze Data	Determine accurate interpretations	Know language
			Know context
			Share lived experience
		Multiple strategies for analyzing quantitative data	Disaggregate variables
			Cross tabulations
	Results and dissemination	Community review results for "relevance gaps"	
		Widely disseminate	Use multiple modalities
		Clearly present data	
		Report in modes appropriate for the "right people"	

Derived from Frierson, Hood, Hughes, and Thomas (2010)

Example #2: Collecting Data for an Afterschool Arts Program in Baltimore

- Step 7. Collect the data
  - What kind of data and how do we best collect it?
- Step 8. Analyzing the data
  - Used both qualitative and quantitative methods, disaggregation of data
- Step 9. Disseminate and Use the Results
  - Considered the audiences and how to best disseminate information

What's The Workshop's Bottom Line? (What will you take with you?)

- Culture matters and affects every evaluation and data collection

- CRE encourages the consideration of a variety of factors in conducting evaluations in agencies and communities
  - Consideration of cultural context and factors can provide a more responsive and accurate evaluation

Questions and Comments?

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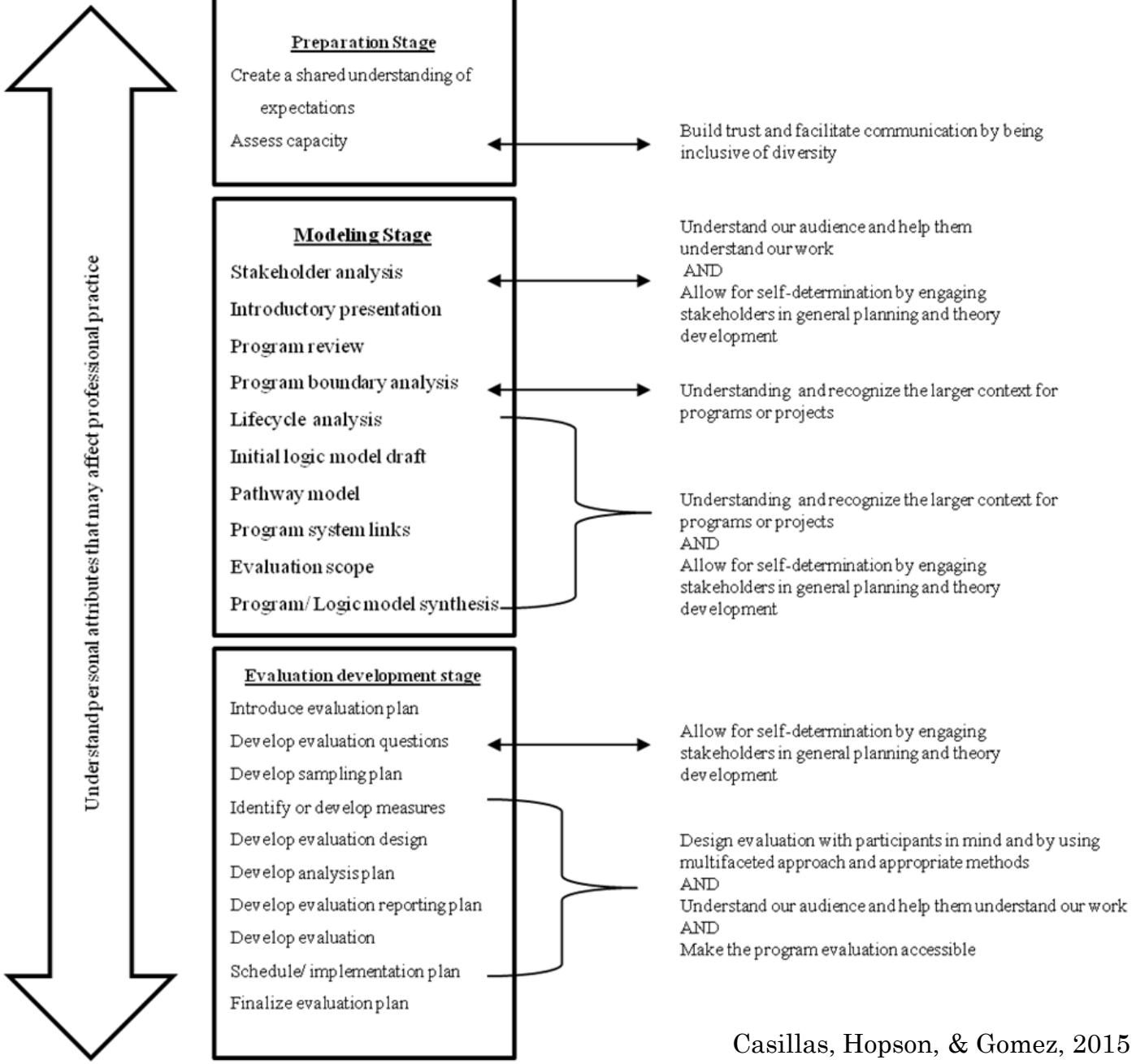
Using CRE Strategies: A Couple of Tools To Consider for Your Toolkit

Integrating CRE in your practice

- STEP 1: Articulate the steps that you engage in
- STEP 2: Identify steps where CRE principles, tenets, ideas align or steps that could be augmented with CRE
- STEP 3: Operationalize what CRE “looks like” in that step using our discussion today
- STEP 4: Adapt and use your hybrid approach!

Adapting the SEP



Casillas, Hopson, & Gomez, 2015