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Introducing Reflexivity to Evaluation Practice: An In-Depth Case Study

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Abstract

There is currently a paucity of literature in the field of evaluation regarding the practice of reflection and reflexivity and a lack of available tools to guide this practice—yet using a reflexive model can enhance evaluation practice. This paper focuses on the methods and results of a reflexive inquiry that was conducted during a participatory evaluation of a project targeting homelessness and mental health issues. I employed an action plan composed of a conceptual model, critical questions, and intended activities. The field notes made throughout the reflexive inquiry were analyzed using thematic content analysis. Results clustered in categories of power and privilege, evaluation politics, the applicability of the action plan, and outcomes. In this case study, reflexivity increased my competence as an evaluation professional: The action plan helped maintain awareness of how my personal actions, thoughts, and personal values relate to broader evaluation values—and to identify incongruence. The results of the study uncovered hidden elements and heightened awareness of subtle dynamics requiring attention within the evaluation and created opportunities to challenge the influence of personal biases on the evaluation proceedings. This reflexive model allowed me to be a more responsive evaluator and can improve practice and professional development for other evaluators.

Keywords

critical reflection, reflexivity, homelessness, participatory evaluation, evaluator competencies

Reflective practice is listed as a domain of competency in evaluation (American Evaluation Association [AEA], 2004), yet there exists a paucity of literature in the field of evaluation on the practice of reflection and even less literature on the practice of reflexivity. Available strategies for practicing reflexivity are lacking as is an understanding of how to develop this important skill for evaluation practitioners. However, practicing reflexivity can enhance professional development and evaluator competence. This article describes a method for practicing reflexivity that I developed and applied to a participatory evaluation within a homelessness and mental health demonstration project.

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Although the literature on the practice of reflexivity in evaluation is minimal, foundational literature in other fields that builds on the qualitative research paradigm can help researchers become more self-aware in their roles. The field of reflexivity builds on concepts from phenomenology and practices such as bracketing one's assumptions that have long existed in other domains of practice (Finlay, 2002). Reflexivity can be defined as "maintaining a self-critical attitude and questioning taken-for-granted assumptions regarding the political nature of our work and its (intended and unintended) effects, as well as the social distribution of these effects" (Poland et al., 2006, p. 61). Poland and colleagues (2006) have suggested that engaging in reflexivity requires some specific steps, including (a) attention to the tacit knowledge and perspectives that practitioners bring to their work, (b) an openness to being transformed by engaging with those from different social backgrounds who may question our evaluation practices, (c) questioning the knowledge we hold to be valid, (d) a curiosity about other perspectives and ways of seeing, (e) mindfulness and presence, and (f) an awareness of power and one's social location.

Discussions of the practice of reflexivity for evaluators are relevant to both culturally competent evaluation and participatory methods; due to space limitations, I offer only a brief explanation of these connections. Different cultural groups have differential experiences of power and privilege, and these status differences between cultural groups can create and perpetuate inequities in power and access to resources (AEA, 2011). Culturally competent evaluators work to avoid reinforcing cultural stereotypes and prejudice in their work and work to remain aware of marginalization (AEA, 2011). Understanding the experience of being devalued, marginalized, or subordinated is critical to responsible use of evaluative power in promoting equality and self-determination (AEA, 2011). The official statement from the AEA on cultural competence (2011) requires that evaluators maintain a high degree of self-awareness and self-examination for the purpose of better understanding how their own backgrounds and other life experiences serve as assets or limitations in the conduct of an evaluation—a cornerstone in reflexive practice. Participatory methods in evaluation involve including members of the target population of the program in the process of evaluation itself. These methods can differ from conventional evaluation approaches in many ways including why and how the evaluation is being done, who evaluates, what is being evaluated, and for whom the evaluation is being done. It may be particularly important to use reflexivity in participatory evaluations because of the power differentials described by Nelson, Ochocka, Janzen, Trainor, and Lauzon (2004) that can exist between the groups involved.

The concept of reflection emerged from professional education literature (Schon, 1983) and was first defined as "active, persistent, and careful consideration of any belief or supposed form of knowledge in light of the grounds which support it" (Dewey, 1933, p. 118). Bradbury, Frost, Kilminister, and Zukas (2010) criticize reflection and reflective practice for being too focused on the individualistic—rather than situated—understandings of practice. Still, there is potential for reflection and reflective practice to enhance problem-solving, professional development, decision-making, and empowerment (Moon, 1999) and also to prevent burnout, repetitive thinking, and missed opportunities at the individual level (Schon, 1983).

Several authors have reported on the way the terms "reflexivity," "reflective practice," "reflection," and "critical reflection" have been used interchangeably and note the blurring between the concepts as problematic (Boutilier & Mason, 2007; D'Cruz, Gillingham, & Melendez, 2007). Yet, reflexivity is decidedly contextual: This separates it from the concepts of reflection or the reflective practice that do not require the actor to consider themselves within the situation they are operating. Reflexivity considers actors in their context, with their assumptions, biases, social location, and prejudices, and highlights politics and power (Bradbury, Frost, Kilminister, & Zukas, 2010).

The Canadian Evaluation Society (CES, 2010) designated reflective practice as one of five evaluation core competencies. They define reflective practice as a group of "competencies that focus on the fundamental norms and values underlying evaluation practice and awareness of one's

evaluation expertise and needs for growth'' (CES, 2010). Evaluation scholars have noted that these competencies can aid in professional development by anchoring reflective practice and providing substance for self-assessment (Stevahn et al, 2005), and some evaluators have called for more collective reflective dialogue (Cooper, 2014).

Further, within the CES (2010) reflective practice domain, the following areas relevant to reflexivity are deemed as necessary for evaluators to have competence in respecting all stakeholders, recognizing one's own biases and striving to be equitable, awareness of self as an evaluator (knowledge, skills, and dispositions), and reflecting on personal evaluation practice (competencies and areas for growth). The AEA (2004) guides evaluators to ''be explicit about their own, their clients', and other stakeholders' interests and values related to the evaluation.'' While these standards call for evaluators to recognize their own biases and strive to be equitable, I assert in this article that taking these concepts of professional reflection further and applying them to the political context surrounding the evaluation is a necessary step in moving from reflection toward more reflexive, and competent, practice. Specifically, reflexive practice is a critical component of competent evaluative practice because it can heighten awareness of personal biases and political context and invoke opportunities to challenge the unintended influences of personal biases on evaluation practice.

Although few studies exist that examine outcomes or effects of applying reflexive methods, Jacobs and colleagues show changes in health promotion practitioners' alignment with empowerment perspectives and engagement with critical perspectives on multiple levels after implementing reflexive practice (Jacobs, 2008). Others writing about reflexivity in evaluation have suggested that this practice can deepen awareness of personal position (Jewiss & Clark, 2007) and can bring attention to ethical tensions between context, analytical frameworks, guiding principles, and assumptions (Clayton, 2013).

Evaluations often carry political implications; thus, we must pay careful attention to the intended and unintended outcomes of our work. Every act from how we frame an evaluation question to what type of evidence we include in our investigation deserves reflexive questioning. In this article, I offer methods for employing reflexive questioning and present the results of a case study where I developed a model of reflexivity and applied it to an evaluation project.

Evaluation Context and Model Development

Evaluation Context

As a research coordinator in a research institute in Canada, I was tasked with conducting a participatory evaluation to evaluate the process of using the skills and perspectives of *people with lived experience*[1] to inform the design and implementation of a research project on housing stability for homeless individuals with mental health issues. This 8-month, participatory evaluation was commissioned in 2011 jointly by all the research partners on the project to (1) find out how the process of engaging people with lived experience in the larger research project evolved during this project and (2) to share lessons learned with other projects trying to include perspectives of people with lived experience. The goals, methods, and results of the participatory evaluation are reported on by our research group elsewhere (van Draanen et al., 2013). This case study focuses not on the evaluation conducted but on the process of reflexivity that I used within this evaluation and on feasibility of implementing the model within this evaluation. Three evaluators were chosen from the group of people with lived experience to work with me on the evaluation: Janet, Rick, and Alisa,[2] each who had personal experience of mental health issues and homelessness.

In my experience, power and privilege affect evaluations by both framing the contexts in which evaluators work and by systematically controlling which groups of people access health and social services and which groups of people evaluate them. I choose to be reflexive in my evaluation practice because I see privilege and power in society continuing cycles of poverty and perpetuating marginalization. Reflexivity, as I define in the introduction using Poland et al. (2006), is essential if I

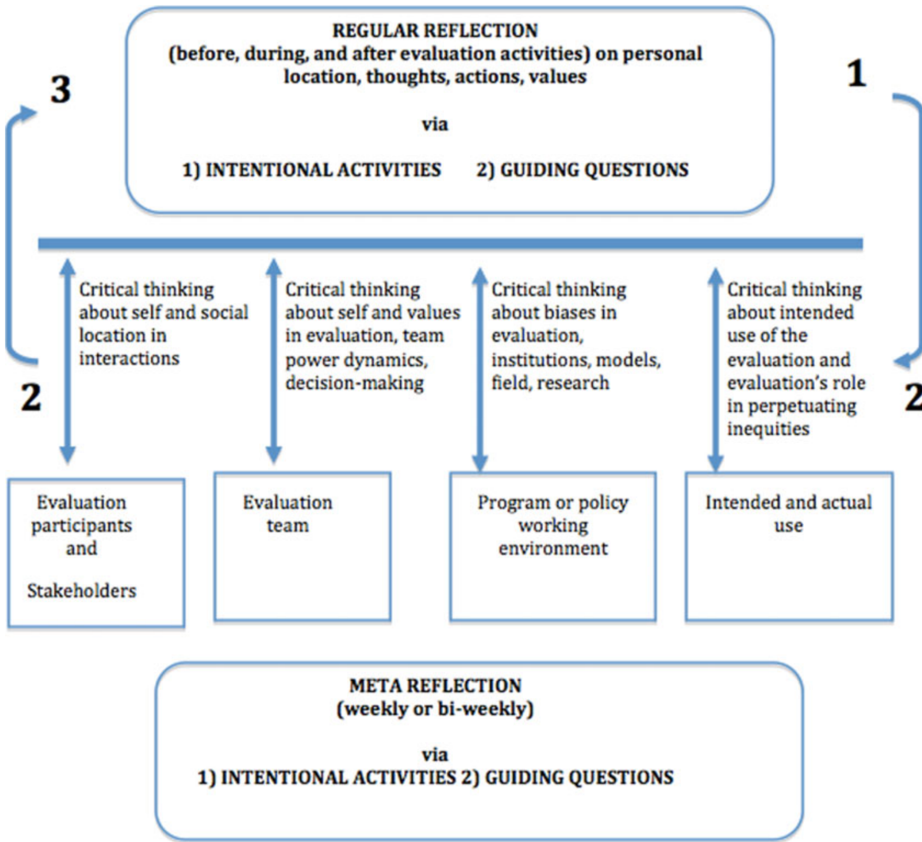

Figure 1. Practical model.

am to be self-critical and to question my assumptions as well as the effects of my work. Despite recognizing the need to be reflexive in my professional practice during this evaluation, I felt ill prepared to do this due to the lack of explicit models for reflexivity in evaluation practice in the literature. Thus, I created a reflexive action plan grounded in the literature to guide my reflexive inquiry based on a practical model (depicted in Figure 1), intentional activities (shown in Table 1), and critical questions (shown in Table 1).

Model Description

The reflexive action plan was developed iteratively. Starting with a literature review of the published articles on reflexivity as a guide, I created a model and critical questions. I then sought advice from colleagues at an evaluation conference, through evaluation groups on LinkedIn (a professionally oriented social networking service), and from instructors experienced in reflexivity at a local university. Following this, I refined both the model and the critical questions and created the intentional activities during the first 2 weeks of implementation. The original version of the reflexive action plan contained several components that were removed including questions such as “What if different partners had collaborated? Who else is missing from the table?” and mind-mapping exercises—none of which I found helpful. The model depicted in Figure 1 was designed at the beginning of the evaluation and provides a visual guide for implementing reflexivity in an evaluation. The reflexivity process

Table 1. Action Plan Components.

Intentional Activities	Critical Questions
These activities may happen simultaneously and may not need to all occur for all individuals. The need for these and other activities should be questioned as part of the process. 1. Regular journaling using critical questions 2. Discussing reflections with a supervisor (or team members) 3. Meta-reflecting on the reflexivity process 4. Engaging with someone willing to act as a trusted dissenter or critic	These questions should be returned to periodically and are meant to guide the evaluator's thinking, journaling, and diagramming. The need for these and other questions should be questioned as part of the process. These questions have been adapted from other reflexive literature (Boutilier & Mason, 2007; Schon, 1983). 1. Have my reflections served to solidify my position/concept of power? 2. What tasks, relationships, or contexts have I been neglecting in my reflection? 3. What else can I be doing to implement guiding principles and my personal evaluation values? 4. If I was guided by a different discipline or different theory, what might I do differently? 5. Why and how do others involved in the evaluation do things that is different from my own ways? 6. What are other ways the same situation could be viewed? What perspectives have been prioritized?

starts with regular reflection before, during, and after evaluation activities on the self and personal social location, thoughts, actions, and values. During these activities, careful attention is given to the way these personal elements might be influencing the evaluation work. This process is guided by the intentional activities and guiding questions shown in Table 1. Then, weekly or biweekly (as deemed appropriate, feasible, and necessary), the evaluator devotes time to meta-reflection in four domains: critical thinking about (1) the influence of social location on interactions and dynamics between evaluators, evaluation participants, and other stakeholders; (2) the values within evaluation teams and the effects of these values on decision-making; (3) the personal biases in evaluation, dominant paradigms, models, and institutions and how those relate to the program and evaluation working environment; and (4) the intended use of the evaluation and how the evaluation use might be related to broader social inequities.

The process is cyclic, as daily reflection on personal biases and assumptions feeds into the meta-reflection, illustrated through arrow $1 \rightarrow 2$, and concepts illuminated in the meta-reflection can change evaluation practice and are incorporated in the subsequent regular reflection times, illustrated through arrow $2 \rightarrow 3$.

This case study sought to answer the following questions: (1) How applicable is the reflexive action plan to a participatory evaluation of a homelessness research program? (2) What key themes were elicited during the reflexive process? (3) What lessons can be shared with other evaluation practitioners looking to apply this action plan to their own evaluation practice?

Method

I conducted a case study of my experience creating and applying a reflexive action plan to guide reflexive practice in evaluation. The term "action plan" was chosen specifically to recognize that the practical model was accompanied by a series of activities that are considered necessary to implement the critical thinking described in the model. Case study data come from the field notes made throughout the evaluation, written by the author. I used field notes to capture reflexive processes as they occurred.

I conducted the following activities to employ the action plan: (1) I posted copies of the models visibly in my workspace to serve as reminders, (2) I provided copies of the models to chosen trusted dissenters or critics to refer to when discussing the evaluation with me, (3) I scheduled an hour of structured time 3 times per week to reflect and write field notes, (4) I reviewed the previous field notes weekly before writing the new ones, and (5) I set aside one session every 2 weeks for meta-reflection. I designated time for meta-reflection to ensure that my personal reflexivity was related to the broader project work and to evaluate my reflexive work in progress. Meta-reflection involved me rereading previous field notes and deliberately giving time to thinking about, for example, how the reflexive process was affecting the evaluation, while the other reflection times were spent on critical thinking about my positionality within the evaluation.

When I reflected, I wrote journal entries where I documented my thoughts, actions, and values within the evaluation. More specifically, I wrote about my assumptions and I documented the discussions and decisions the team made from my perspective. I wrote about my social location and the effect I felt my presence was having on the evaluation proceedings. I also wrote down my thoughts and reactions to specific questions like "how do other stakeholders do things differently from me?" and "what perspectives have been prioritized?" Along with the devoted time for written reflections, I discussed my reflections with my supervisor and trusted dissenters once each week. I took notes from our conversations and included these as field notes as well. I kept field notes electronically using word-processing software.

The other three coevaluators and two trusted dissenters were aware of the reflexive activities (described above) and were invited to write field notes about their experiences in the evaluation to share for inclusion. No trusted dissenters or coevaluators submitted field notes or oral reflections; however, all coevaluators and trusted dissenters had conversations about the reflexive project with me, which I incorporated into my field notes. For example, I took notes on evaluation team meetings and used the meeting notes where we often engaged in reflective and reflexive discussions as a group in my field notes. A total of 63 field notes including personal reflections, meeting notes with my supervisor and trusted dissenters, and notes from group reflexivity were included in the analysis.

The decision to analyze my own field notes and not to involve the coevaluators in the analysis except through discussions of the reflexive process and results was based on practical considerations. The coevaluators were paid for each hour of their time, and it was out of the scope of the project and budget to pay them to analyze these data. However, the evaluation team dedicated 15 min at the end of each meeting to talk about their reflections on the evaluation, and during this time, I brought up some of the themes I was finding and the coevaluators helped to develop and verify themes using this process.

Field notes were analyzed using thematic content analysis, as described by Paillé and Mucchielli (2003). Once the field notes were complete, I began open coding by marking up data with a series of codes that I extracted from the text itself. I then grouped the codes into similar concepts in order to make them more manageable and coherent and then established categories. Within some categories, there were multiple distinct concepts, so I performed axial coding to categorize the data into subthemes. The codes and categories that arose during the coding process were reflective of the initial conceptual framework of the project and also reflect the initial design of the study and the initial intent of the reflexive practice. As the coding process was iterative, some codes and categories evolved or were combined throughout the case study. The categories included (1) experiencing power and privilege within the evaluation (with codes of the influence of social location, reactions to privilege, compensating), (2) evaluation politics (balancing acts, engaging negative internal stakeholders, language, "tiptoeing," and the devaluation of experience), (3) the applicability of the action plan (with codes of molding the model, health promotion/evaluation

values, and the applicability of model components), and (4) outcomes associated with reflexive practice (with no codes).

The results presented below were elicited during the analysis process, with only a selection of the results included due to space considerations. These results are organized by the categories created in the coding process.

Results

In the analysis of field notes, results presented here clustered in several broad categories including my experiences of power and privilege in the evaluation (with subthemes of social location and compensating), evaluation politics (with subthemes of balancing acts, engaging negative internal stakeholders, language, the devaluation of experience), applicability of the action plan (with subthemes of molding the model and the applicability of model components), and outcomes associated with reflexive practice.

Experiencing Power and Privilege Within the Evaluation

Social location. The field notes about my personal perception and experience of my social location (i.e., my relative position in society based on aspects including education, race, income, etc.) refer repeatedly to having multiple and sometimes conflicting experiences of power. The field notes started with a description of my social location and the social locations of other stakeholders, as defined by us individually and then discussed together. Over time, the field notes evolved into more analytic and thoughtful reflection on the way these dynamics affected the evaluation. As this early quote illustrates, my awareness of my social location was apparent, but I did not comment on how my experiences and values might bias the evaluation:

> Starting from a place of understanding that I have a dramatically different social location from the co-evaluators and the research participants is important for me. The professional and personal values I bring to this evaluation are empowerment, social justice, shared decision-making, and inclusion.

In this context, at the beginning of the evaluation, I made my values explicit and noted that it is important to me to share or relinquish power to those with less power when I am in positions to do so; that I want my actions to contribute to justice in the distribution of wealth, opportunity, and privilege; and that I seek inclusion of voices that are excluded or silenced. When we discussed how we wanted to approach the evaluation, the coevaluators shared similar sentiments and also noted that they wanted the evaluation and the research program more generally to make an actual difference in the lives of homeless people. My field notes revealed occasions in the evaluation in which I felt less powerful and uncomfortable when, in response to obvious power differentials, the other coevaluators challenged and confronted me. This type of confrontation of privilege was an uncomfortable yet important occurrence, and in the field notes, I reflected on how over time identifying and recording my discomfort allowed me to "depersonalize the experience." Depersonalizing these confrontations led me to be less reactive and more sensitive toward how other people, especially those who are marginalized, may experience a lack of power and how my personal social location and relative privilege may contribute to the feelings of exclusion that coevaluators expressed. In the meta-reflection process, I came to see confrontational comments from other coevaluators as legitimate reactions to unfair power differentials and it allowed me to react in what I perceived to be a more productive way. The quote below comes from a reflection on an evaluation meeting midproject where we were talking about the level of the honorarium that should be given to participants. Although we all agreed on the same level of funding, the conversation was abrasive.

> When Janet said "people like you don't understand these things," it stung a little bit, but less than I expected it to. I think I'm developing a thicker skin towards these comments. I noted that the co-evaluators perspectives were particularly important on topics like this, and asked if she felt her opinions on this hadn't been taken seriously in the past. We then shifted to talking about situations in which they felt particularly disrespected, and eventually came back to the topic of honorariums. The tone in the room changed from hostile to less hostile and even approached collaborative.

In the early field notes, there was a strong recurring theme of personal guilt and discomfort that I felt as I reflected on my social location. This guilt was strongest when I compared my situation to the marginalization described by the other coevaluators. I had very strong visceral reactions to this and felt uncomfortable in my own skin.

> The group of people with lived experience were disappointed because they thought they would be getting research and evaluation training and eventually be hired on to do some of the research for the project: the project I was hired onto. This makes me feel uncomfortable, fortunate, and undeserving.

Yet, this guilt did not persist. In the context of the field notes, I recorded enjoying my social status when it was convenient, which was most of the time, and resenting it when I felt it brush up against another stakeholder's perceived status of less privilege.

Compensating. The field notes revealed attempts in which I tried to compensate for my advantaged social and occupational positions relative to the coevaluators and participants. I recorded myself wanting to "give" decision-making power to coevaluators or to compensate for my perceived power in the evaluative process. I noted the confidence I felt about my knowledge of evaluation methods and questioned how my training and my privileged occupational position might be contributing to the dominance of my opinions in the evaluative discussions. I would hold back my own opinion while trying to elicit suggestions from them in my attempt to share power.

> At the meeting today I tried to ask them what they were looking to get out of the evaluation, what they wanted the purpose to be, and they didn't answer the question. They kept asking what the other research partners wanted the purpose to be.

The coevaluators' interest in the agendas of the other research partners was thoughtful and appropriate, in my opinion, but because the evaluation was participatory in nature and because I was aware of the possibility of privileged perspectives being dominant, I wanted to know more about what the coevaluators wanted from the project. I noted that including their perspectives, however, served to make me feel better about my privileged position (both in society and in the evaluation), as I discussed in one of the field notes. It helped me mediate my discomfort with the power I had. In the field notes when I was reflecting critically about the power sharing, I recorded that I did not want to "lose" the power I had. I still wanted to maintain control of the project and to "facilitate" everything; I just wanted it to be shared ideas that I was facilitating. Over time, and through the process of meta-reflection, I began to notice that I was listing specific situations as examples when I was asking for the group to make a decision or provide input, and I saw that these situations were not part of a structure where decision-making was truly shared but rather sporadic tasks and decisions that I brought to the group as I saw fit. I became aware of the futility and inappropriateness of trying to give power, and the way that my intentions actually conflicted with empowerment models that suggest that empowerment is an internal process, that is not given but developed over time as structural processes become more equitable. With this realization, I pivoted to focus more on cocreating spaces for the other evaluators to take the lead and make decisions.

Evaluation Politics

Balancing acts. I had several reflections on my fear of conflicting agendas within the evaluation project before the project actually started. As the project unfolded, there were relatively few conflicts between different stakeholder agendas in the project. I anticipated having to advocate for the participatory evaluation methods and instead didn't have to at all. The field notes revealed an eventual realization that my fears were unfounded and that I had made prejudgments based on my perceptions and experiences in the larger field of evaluation with resistance to participatory approaches. I initially wrote,

> I want the chance to do participatory evaluation and maybe some capacity building, but I'm afraid that the need to demonstrate value to funders will steer the evaluation in other directions.

I also had fears about feeling pressure to tell a "wholesome" story or to de-emphasize some of the challenges that the group faced in their first 2 years of operations while they were supporting the homelessness research project and projected these fears onto stakeholders who actually did not end up expressing any of those opinions. I questioned in my reflections whether or not my projections caused me to downplay any of the negative findings unintentionally and I ultimately reviewed the analysis again looking for this suppression explicitly. The coevaluators took on this challenge with me, as they noted their own desires to downplay negative findings (although for different reasons). In the reanalysis process, together we searched for what we perceived to be negative findings in the data and reexamined conclusions and assessed the weight we gave the findings in our final report, seeking to answer questions like "did we represent those findings fairly in the final report?" and "did we perceive certain data to be more or less important than others, and how did that affect the way we presented it to readers in the report?"

Another example of delicate balances that I explored in my reflections came up in the strong and politicized negotiation of language that occurred throughout the evaluation. When publishing our findings, there was significant disagreement around using language that people with lived experience found stigmatizing including "mental illness" and "consumer." The researchers preferred to use this language as it is commonly used in the field, while the people with lived experience preferred language such as "mental health issues" and "person with lived experience," which they found to be less offensive and less exclusive. My first reflections on the topic noted my ambivalence about the particular word choices, but my interest was in keeping people on the evaluation team feeling safe and respected. I reported feeling subtle pressure to conform to the language preferred by the researchers (my superiors) and yet also feeling a duty and desire to recognize and exclude this particular stigmatizing language from our work. The field notes discussed this tension and the social justice implications of these competing demands as well as my role as the evaluator feeling the need to mediate and balance the competing demands. In exploring how I felt about the tension, I wrote:

> I don't think the journal will appreciate if our publication doesn't use the language used in the field, yet surely this is less problematic than if the people we are working with and our very own colleagues feel disenfranchised because of the language we use.

I noted in my reflections the power I had in writing the article and the distance I was privileged to feel from the stigmatizing language we were debating. My own experience with mental health issues did not make me feel stigmatized by language in the way the coevaluators were describing. I realized the implications of my power in the context of controlling codified knowledge and decided that I wanted to use my position to convince the group to resist stigmatizing the coevaluators through our choice of language. I went on to recognize that this has broader implications than just for our project, and I reflected on the effect that this could have on the field, as using language that is mainstream but

some people find oppressive "may help to further the propagation of oppressive language." Ultimately, the team decided to use both terms in the beginning of the article and to clarify the intended definitions, followed by the coevaluator-preferred language for the rest of the article.

Engaging negative internal stakeholders. Initially, I reported feeling tension between one of the coevaluators and myself, and I had difficulty responding to her. As I noted,

> At our most recent meeting, I noticed that every time I spoke Janet cut me off. It was very obvious to me, and she didn't do it to the other people in the meeting.

At first, I focused on why she reacted so strongly to me and to ideas she didn't like in general. The field notes revealed this to be a fruitless exercise, and it was making me uncomfortable to try to guess what she was thinking or try to "rationalize what she was doing"—as I was making unfounded assumptions. Our first few meetings were difficult for me, but eventually I stopped taking her confrontations personally and chose to see them as a "helpful dissenting view." I still recorded our interactions and the way they made me feel but making a conscious choice to view her critical comments as a positive addition changed the way I handled them. This acceptance allowed me to be more comfortable with the coevaluators, and my field notes on this new internal critic took on a notable difference in tone.

> Her challenges are usually valid points, and it's not very often someone openly defies an entire group with their opinions or suggestions. We should consider ourselves lucky to have an internal critic.

I reported asking for her input, instead of shying away from it. Over time, and perhaps aided by my change in perspective and behavior, I noted Janet and I having fewer hostile interactions.

The exclusivity of evaluation language. In the field notes, I reflected on how innate some things seemed to me and specifically the lack of sensitivity I had around the language I used. My education trained me to use politically correct terminology, but what I experienced in this evaluation was a reaction to the "research" language that I used, not what I originally regarded as exclusive language. The coevaluators taught me that to them the "word 'evaluation' itself was a problem" because it is associated with "judgment and negative feelings." The coevaluators suggested that instead we ought to call our project an "exploration" which was difficult for me to identify with initially because it sounded "soft," but later I came to appreciate the way it implied curiosity and learning instead of judgment.

My field notes included reflections on the ways that academic and professional jargon can be alienating, and the effect of relatively privileged people controlling the discourse around poverty and marginalization. Although I was conscious in my field notes that people who are marginalized have traditionally experienced a host of barriers to participating in this dialogue, language is one that I did not properly appreciate until very late in the evaluation process.

> During Wednesday's meeting, Janet stopped me mid-sentence and said, "can we not use that word?" The word I used was "segue" and it took me several seconds to figure out what I had said that was wrong. She said it is a word only used in these types of business settings and no one knows what the heck we're talking about when we talk like that.

The reflexive exercise illuminated for me the reality that those of us working in the field of evaluation may not yet be aware of what needs to change for us to become truly inclusive as a discipline, or profession, or person.

Devaluation of experience. The relative importance that the evaluation profession has traditionally given to the role of personal experience with the subject matter being evaluated was another theme present in the field notes. Education is considered a necessary component of "being competent in evaluation" for some, yet this can make it challenging for people living in poverty to undertake these activities and be taken seriously. In participatory approaches, there is typically still an educated person facilitating the evaluation process. My reflections noted the way that this participatory evaluation "brought in people from the margins to the center" but did so in "controlled and prescribed" roles, with expectations for what, when, and how they would contribute to what was being done in the "center."

I reflected with interest on the reality that that experience *in* the subject being researched is not often considered a requirement of being a good researcher or evaluator—some knowledge *of* the subject being investigated is considered helpful—but knowledge is often "created by those with no experience" in the case of research on poverty, mental health, and homelessness. Thus, lived experience is "systematically excluded from teaching and learning and the profession of evaluation." Several field notes recorded how my awareness of this issue developed.

> Research and evaluation (two fields that I am employed in), then, have helped to systematically disempower people with lived experience of the issues being investigated. By adhering to the traditions of these disciplines, I have the potential to exclude or at least tightly control the true input of people with lived experience. This gives me a responsibility to resist these traditions and find ways of including otherwise unheard voices.

Even though we were using participatory approaches, I realized through the reflexive exercise a persistent clinging to my previous understandings of what constitutes evaluation, and how it can be done. As I wrote,

> The potential suggestions I give for methodology, etc. may be creative and flexible to fit different populations, but they still stem from my understanding of what different evaluation methods can and cannot be.

My analysis revealed a tendency for me to get "caught up" in the daily demands of the project, and lose sight of the real issues being addressed within the project. I noted irony in how the project "addresses important issues of homelessness and inclusion" while finding myself too busy discussing project details to engage with any real attentiveness in how the actual issue of homelessness was "changing in the city around me."

At one point in an evaluation meeting early in the evaluation, one of the coevaluators stated that they "didn't want to be part of another evaluation" if it wasn't going to have a serious impact on the issues of homelessness and mental health. At a different meeting, the same member brought up a personal issue of stigma and started talking about real-world attitudes toward homeless people, like herself. My reaction to it was at first annoyance because I interpreted the comments as being off topic, but in reflecting on the experience, I realized how relevant the comments were and how conditioned I was to segment information into boxes of relevance and irrelevance.

> My first thought when Janet was talking about her experience with the paramedics was, "This is so off-topic. How am I going to get through this agenda if she keeps getting side-tracked?" As if my agenda was more important than her experiences of discrimination in the very issue we were trying to address!

Through the reflexive process, I realized a tendency for my reflections to focus on the evaluation process rather than the ultimate goal behind the commissioning of the evaluation and the broader research project. I further recognized that I was using real peoples' experiences as "data" without

properly considering the impact that sharing their data repeatedly without achieving any social change had on the individuals.

Applicability of the Action Plan

Molding the action plan. The field notes I analyzed also provided insights on the applicability of the reflexive action plan. Setting up a detailed action plan before beginning the process of reflexivity was ambitious and that the reflexive practice could have benefited from further revising the action plan after starting the activities. Although I was theoretically open to changing the action plan, in practice I was reluctant to do so. More often, I assumed it was my "negligence in applying the model" to a particular area of my practice rather than the model being too rigid.[3] As this quote illustrates, the model was at times too overwhelming to implement effectively.

> I find it overwhelming trying to pay attention to all the areas in the action plan that I am supposed to be mindful of as I am rolling out the evaluation. There is too much to think about at once!

Reflecting on my thoughts, actions, and values was much easier and came much more naturally after daily activities. Reflecting during daily activities, I found to be near impossible. The excitement I had during evaluation activities made it hard to reflect, and I didn't have time to write proper field notes during activities. Any reflective thoughts I had during activities, I jotted down a quick note about and returned to the end of the day. The analysis of field notes indicated that for me personally, reflecting during activities necessarily "took a different form" and occurred while I was mindful, present, and engaged in the activities in the form of changing my actions based on past reflections.

The model in Figure 1 shows different steps in reflexive practice that, as illustrated, appear more compartmentalized than the actual reflexive practice was. In practice, the field notes combined areas of reflection that are separate in the model and showed considerable overlap between the daily reflection and meta-reflection.

Applicability of individual components. The critical questions worked well to stimulate my thinking. When I was assessing the relevance of my action plan in one field note, I was bothered that I hadn't actually "answered" any of the critical questions. I made a note to answer them in my subsequent journaling. As I continued writing and reflecting though, I found that the critical questions were not easy to answer and perhaps not meant to ever have an "answer." I concluded I might do myself a disservice by trying to provide a single discrete answer to any of them. Instead, I looked over them before journaling and found a relevant question or two to probe and structure my thoughts around each time.

The intentional activities were effective in adding formal structure to the practical model and in ensuring regular journaling occurred. Having protected time within my work day to reflect worked well to create an "expectation of diligence" with the journaling, and posting the practical model in my cubicle was effective in increasing mindfulness of the process and focus in the journal entries. The visual of the practical model also served as a reminder to implement what I was thinking, writing, and analyzing back into practice.

The field notes illustrated that trusted dissenters were "found in different forms," and several individuals gave "critical and helpful feedback" about both the evaluation and the reflexive process. This was a recurring theme and the role of trusted dissenters was essential to the evaluation process. One trusted dissenter was a formal classmate who agreed to play this role in the reflexive process of challenging my assumptions and "looking for holes" in my explanations when I debriefed about my experiences with her. Another trusted dissenter was found in a supervisor on the project who would regularly discuss the evaluation and my reflexive practice with me and ask "challenging, probing

questions." Lastly, I found a trusted dissenter in one of the coevaluators with lived experience. This coevaluator played devil's advocate and regularly voiced unpopular opinions at evaluation meetings to represent perspectives that others did not: This forced me to question my thoughts and actions—both in our meetings and in my reflections afterward.

Overall, the reflexive action plan was relevant and easily applied to the evaluation. The model was adapted slightly as were the intended activities and critical questions, and I recommend this for others adopting the action plan in their work.

Outcomes Associated With Reflexive Practice

As this case study was designed to develop and test the feasibility of implementing a model for reflexive practice and was not designed to measure or objectively comment on outcomes of the practice, there is little that can be definitively said about the impact of this reflexive practice on the direction of this evaluation. Similarly, this article is not able to present data on participant or coevaluator reactions to and interactions with my reflexive process, other than what is captured in my field notes through my observation and our group discussions. More detail on participant and coevaluator experiences would have been desirable. This presents a limitation of the current study and an opportunity for future research.

It is abundantly evident to me, nonetheless, based on my experience in this project, that reflexivity has great potential for supporting program evaluation practice. I personally experienced the way it heightens practitioner sensitivity to assumptions and biases present in their work. In this particular evaluation, the exercise helped to patch some of the disconnect between myself and my coevaluators by forcing me to question knowledge, be attuned to power dynamics and my own social location, and be open to alternate ways of interpreting the world. While it may not be possible to ascertain the impact that my reflexive practice had on the evaluation, or the other coevaluators, I believe it helped to create more open and inclusive dialogue and allowed opportunities for evaluator and stakeholder learning that otherwise may not have occurred.

Discussion

This case study sought to examine the following questions: (1) How applicable is the "reflexive action plan" to a participatory evaluation within a homelessness research project? (2) What key themes were elicited during the reflexive process? and (3) what lessons can be shared with evaluation practitioners looking to apply this action plan to their own evaluative practice? The results section answered the first two research questions in depth. Now, I address the final question below.

What are lessons learned that can be shared with other evaluation practitioners looking to apply this action plan to their own evaluative practice?

1. *Bringing reflexive practice into evaluation can increase awareness of self and context.* I developed a keen attention to the perspectives that I, as a practitioner, brought to my work and other evaluators can experience similar benefits. I also observed myself develop openness to being changed by the experience of engaging with people from very different social backgrounds. The reflexive practice exercise encouraged questioning self-evident knowledge and routine practices and instilled recognition in me that this is a lifelong process. I expect that through these exercises, other evaluators can achieve a more acute awareness of power relations and their own social location and positionality.
2. *Reflexivity begets reflexivity and professional development.* Throughout this exercise, I noticed my thoughts evolving and found that the process of reflecting became easier. I began to question my assumptions naturally, without the prompting that I needed at the beginning. Additionally, I transitioned in my journaling from being initially more inward looking and

focused on my thoughts and feelings to eventually being more aware of and concerned with myself within the context I was operating and the effect I was having on the evaluation. In this way, the activities changed from reflection to reflexivity over time. In evaluations, reflexive practice can affect the perceptions and dynamics of evaluator/evaluatee roles and can additionally encourage professional development for evaluators and stakeholders. For evaluators engaging in reflexive practice over time, both the process of reflexivity may become more comfortable, and the gaps in professional competence may become underscored and actionable.

3. *Reflexive practice needs spread.* Although the practice of reflexivity on an individual level is invaluable, and indeed is the focus of this article, to truly have an impact reflexivity needs to be valued and spread. The implications of reflexive practice in terms of critical thinking, personal and professional development, and social change deserve wider acknowledgment. Reflexivity should be a valued section of academic journal submissions, taught and practiced in school programs, and a regular component of professional development for evaluators.
4. *Reflexivity is not resource-neutral*. This presents a true challenge in evaluations that have limited resources, because reflexive practice takes time. Reflexive practice requires a constant effort to balance these two realities. I was challenged with trying to provide time for the coevaluators to engage in their own reflective process (through things like sharing experiences of marginalization) while making progress as a group on the evaluation activities and deliverables. In my own practice, I struggled with making time for journaling while needing to also devote attention to other work. This is a balance that requires unique navigation for every evaluation and every evaluator.
5. *A word of caution and a cause for pause are warranted.* Some literature highlights the possibility of practitioners using reflexivity to become too inward looking or self-indulgent, whereby the self-critical researcher becomes the "center of text" (Gill, 1995; Maton, 2003). In this way, reflexivity may become a tool to reinforce authority instead of challenge it because the practitioner focuses on himself or herself while believing they are focusing on the context in which they are operating and continuing to act the same in his or her environment believing they are being reflexive. Similarly, some critics see the potential for reflexive practice to preempt external criticism from both clients and colleagues. For example, White and colleagues point out that the use of diaries to record practitioners' experiences may lead him or her to view his or her current perspectives and practices as improved or enlightened by his or her reflexivity and may be less open to external criticism (2001). Or, according to Haggerty (2003), we may justify our subconscious motivations and prejudices. Thus, reflexivity can be misused as another device to legitimize the power and position of professionals rather than question it (Gill, 1995; White, 2001).

Conclusion

Although both CES and AEA have asserted the importance of professional reflection, there is much to be gained by practicing reflexivity or simply put reflection with an understanding of positionality. There exists a real potential for reflexivity to cultivate a heightened sensitivity toward the way some evaluations reinforce marginalization and exclusion and perpetuate the societal inequity that stems from inequality in power. From this place of heightened sensitivity, there is a further opportunity to resist those processes and advance the practice of ethical evaluation (Poland et al., 2006).

Culturally competent evaluation is fundamentally tied to social action and change because of its embedded values. Developing a fuller understanding of the assumptions, values, and prejudices

that we as professionals hold and those that exist in the context we practice in is necessary to be an effective evaluator. I used the reflexive action plan to critically evaluate my work environment and to bring mindfulness to my professional life. In this case study, reflexivity increased my competence as an evaluation professional: The action plan helped maintain awareness of how my personal actions, thoughts, and personal values relate to broader evaluation values—and to identify incongruence. The results of the study uncovered hidden elements and heightened awareness of subtle dynamics requiring attention within the evaluation and created opportunities to challenge the influence of personal biases on the evaluation proceedings. This reflexive model can improve practice and professional development for evaluators by raising our consciousness of our positionality and encouraging us to create opportunities to change how these existing biases shape daily evaluative practice.

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Notes

1. For this project, the term "people with lived experience" referred to individuals who had personal experience of mental health issues and homelessness.
2. Pseudonyms used to protect the identity of other coevaluators.
3. The model presented in this article is slightly revised from the original version after changes suggested in the field notes were incorporated.

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