The Development of a Diversity Initiative: Framework for the Graduate Education Diversity Internship (GEDI) Program

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Abstract

The purpose of this chapter is to provide a historical framing for the development of the American Evaluation Association’s (AEA’s) Graduate Education Diversity Internship (GEDI) program as an outgrowth of the AEA’s Building Diversity Initiative (BDI). This chapter provides historical documentation of the AEA’s BDI and the origins of the GEDI program and discusses how this represents an important part of AEA’s history. We discuss the circumstances that led up to the decision to begin the BDI, the organizational dynamics of bringing about the changes that BDI and GEDI stimulated in AEA and the evaluation profession, and the implications of this process for AEA’s evolution as a culturally responsive organization.
Committee, cochaired by Donna Mertens and Hazel Symonette, and staffed by David Chavis and Kien Lee of Community Science, formerly the Association for the Study and Development of Community (ASDC). Members of the BDI Advisory Committee were made up of a cross-section of AEA members and nonmembers: leaders, emerging and current, such as Board members, TIG chairs, and others invested in the issues of the BDI.

The purpose of BDI paralleled the mission of the Multi-Ethnic Issues (formerly known as the Minority Issues) in Evaluation (MIE) TIG: (a) to improve the quality and effectiveness of evaluation by increasing the number of racially and ethnically diverse evaluators in the evaluation profession, and (b) to improve the capacity of all evaluators to work across cultures. The BDI was designed to encourage and integrate the comments and perspectives of the AEA Board of Directors and AEA members, as well as other key stakeholders within the evaluation community. The BDI was charged with the following six tasks:

(i) Develop a directory of evaluators;
(ii) Summarize foundation and government agency efforts to identify, increase, and hire evaluators of color;
(iii) Summarize strategies used by other professional organizations to increase diversity;
(iv) Conduct a survey of evaluation training programs;
(v) Develop guiding principles for cross-cultural evaluation; and
(vi) Create a diversity building plan and an evaluation plan.

These six tasks produced the Evaluator Survey Report, Best Practices Report, and the Guiding Principles Subtask Concept Paper. The results of the BDI’s surveys reinforced the need to support the development of training programs for evaluators of color, as Hopson and Collins (2005) report. Those surveys revealed:

...a lack of mentoring opportunities, role models, and access to training for evaluators of color. In addition, [ASCD staff] interviewed foundation and federal agency representatives about their engagement with evaluators of color. These interviews exposed the difficulties these institutions face in ensuring culturally responsive evaluations. Respondents attributed this, in part, to the challenge of identifying, accessing, and engaging both evaluators of color and evaluators with the capacity to work with racially and ethnically diverse communities. In fact the majority of the respondents’ institutions were not engaged in deliberate efforts to identify diverse evaluators. (p. 1)

Informed by the surveys, BDI’s work culminated in the development of 14 recommendations to AEA to increase access and enhance the preparation of evaluators of color in addition to improving the cultural competencies of the larger evaluation community. The first of these recommendations was
to create a graduate education fellowship program targeted to students of color. This recommendation provided the basis for what is currently known as the GEDI program. In addition to its diversification agenda, there seemed to be an expectation by leaders of the advisory committee and eventually leaders of the GEDI program that the GEDI program would develop and implement innovative capacity-building curricula and training processes for cultivating socially responsive, socially responsible, and socially just evaluation professionals.

This chapter fills a very important gap in providing a historical record of the Building Diversity Initiative and its implications for the GEDI program. To date, this history has resided in AEA board documentation, minutes, and internal evaluative documents, with very little public record. In addition, with the exception of GEDI program descriptions and intended goals (Collins & Hopson, 2007), little to no published record exists on the processes and framing of the GEDI program from its inception. As the program enters its second decade, this chapter aims to assist evaluation leadership, thought leaders, scholars, and others with ways to build on the foundational framing of the GEDI program.

The layout of the chapter includes a discussion on the methodology that drove the chapter development and results pertaining to the birthing of BDI and GEDI, including key players, tensions, and opportunities or opportunities envisioned nearly a decade ago by three architects of the program.

Methodology

Two primary methods were used to accomplish the purposes of this chapter, i.e., to provide a historical record of the development of BDI and to provide implications for the GEDI program. Initially, we examined documents outlining the deliberations within and among the BDI planning team, the AEA Board, and the W. K. Kellogg Foundation representatives to provide insights into the complex challenges and power dynamics related to diversity change agendas. These deliberative dynamics and developments have been especially germane in the evolution of the GEDI program because of its position among the 14 BDI Recommendations (BDI, 2001). As cochairs of the Building Diversity Initiative (Symonette & Mertens) and first director of the GEDI program (Hopson with support from Prisca Collins, inaugural coordinator), we are in a unique position to describe the progressive change vision of the program. Mertens (former AEA President responsible for the W. K. Kellogg Foundation grant that funded BDI), Symonette (then Co-Chair of the AEA Multi-Ethnic Issues in Evaluation TIG), and Hopson (former Chair of the Multi-Ethnic Issues in Evaluation TIG) served in key roles in the association in moving forward the diversity agenda.

Secondly, we engaged in an audio-recorded and transcribed “trialogue” on two separate occasions in order to reconstruct the history of BDI and discuss the key issues related to the chapter purposes. The trialogue method,
an extension of what is more commonly known in the social sciences as dialogue (Frank, 2005; Gildersleeve & Kuntz, 2011; Parsons & Lavery, 2012), was used as an attempt to provide a critical reflection and narrative of the program from the perspectives and experiences of three thought leaders and visionaries of the field. We specifically draw upon our then positions and affiliations in the American Evaluation Association and emerging leadership roles to provide reflective analysis at the time of the BDI development and GEDI implementation. We draw on previous dialogue methods used in evaluation (Abma & Stake, 2001).

We explored questions surrounding the historical framing of BDI focused on our roles and positions in AEA at the time of its development, the role of other key players, key challenges/opportunities that made it possible to develop BDI, and the key organizational and institutional efforts that preceded the development of BDI and GEDI. Questions surrounding the implications of the GEDI development process included issues related to the legacy of GEDI, key lessons learned in AEA about the larger organizational change processes, and the continual development of initiatives in the association and the field to foster diversity.

In the next two sections, we provide excerpts from the trialogue on the historical framing of the GEDI program and implications of the program's development and implementation. Embedded in our trialogue excerpts are additional discussions and observations about key issues and players in the emergence of a more robust diversity agenda in the American Evaluation Association and the evaluation field.

**Historical Framing of the GEDI Program**

The GEDI program emerged from AEA’s Building Diversity Initiative through a process that began with contact from the W. K. Kellogg Foundation and Donna Mertens, AEA’s president elect in 1997. The introduction of BDI to AEA’s Board and the AEA TIG MIE are documented in this section.

**Birthing BDI**

The following provides background to the initial discussions that led to the founding of the BDI. Key players in the launch of BDI included the American Evaluation Association, the W. K. Kellogg Foundation, and Community Science (formerly ASDC). The trialogue suggests that birthing of the BDI consisted of bringing together visions of diverse groups of evaluators to develop a cadre of evaluators that were responsive to the needs of underrepresented and underserved groups of color in the United States.

The conception of BDI occurred at a meeting of Mertens, in her role as AEA’s president elect in 1997, and Ricardo Millett, the Director of Evaluation at the W. K. Kellogg Foundation at that time. He said that he wanted
to talk to Mertens to see if AEA was interested in taking on an initiative to increase diversity in the profession and in the organization. Mertens recalls:

And of course I said yes. So we sat down there and just talked, you know, really blue sky sort of what could we do, what would it look like, who could be involved.

As it turned out, he had already floated some ideas with David Chavis at what was then ASDC. … The reason for involving ASDC was based on Ricardo’s thinking that this initiative required work that would go beyond the capacity of a volunteer association. I guess the ASDC had done other work for Kellogg, so it was in the same realm and they felt like they had a good relationship. So they wanted to engage them for this scope of work.

It would be something that would require funding and staff to do the work, but he also wanted it to reflect AEA as the lead so that it would have ties to the profession in a formal way. So with that, he suggested that we get together some players from AEA and from ASDC to talk about what that could look like . . .

Mertens convened a meeting in Washington, DC, with Millett, Chavis (then AEA Secretary-Treasurer), Charles Thomas, and Edith Thomas (at the time, Chair of AEA’s Diversity Committee) to brainstorm what it could look like and what kind of things could be done. From that meeting, a preliminary concept paper was developed focused on what AEA’s involvement could be. That concept paper was used as a platform to request the organization to accept the role of playing the lead in developing an initiative to improve diversity in the field of evaluation.

When Mertens took the concept paper to the AEA Board, initial discussions centered on whether AEA was willing to take on this task and if they wanted to accept W. K. Kellogg’s conditions in terms of working with ASDC. Mertens recalls:

I had to really walk that tightrope to say this is something that’s worth doing, and this is the mechanism to get it started. It has funds and it has staff, and it’s a credible group. So it’s not like them coming to us with someone unknown because David (Chavis), at that time, was serving as AEA’s treasurer, so he was a very well-known entity.

So that was a concern, and then the second concern was, should we be focusing just on race. Are there other forms of diversity that would deserve our attention? And, again, personally, I think it was an excellent focus to start with, and, yes, there are other dimensions of diversity.
After extensive discussion, AEA’s Board agreed to the development of a full proposal for their consideration that reflected the arrangement outlined in the concept paper. Once the full proposal was developed, it was shared with the Board who approved it. At that point, the BDI was launched and the rollout process began by holding sessions about its intent and activities at the 1999 annual meeting in Orlando. It was at this meeting that it became obvious that important stakeholder groups had not been included in the initial planning of BDI, as is seen in the next section of this chapter.

**BDI as a Trojan Horse and the Role of the MIE TIG**

The MIE TIG, one of dozens of TIGs of the Association, had long served as an important vehicle in advancing the interests of underserved and traditionally marginalized communities of color and in sensitizing the evaluation field to key inclusive, transformative, and culturally responsive approaches, methods, and epistemologies. The introduction and delivery of the program was viewed with suspicion by the leadership of the MIE TIG because they were not aware of nor involved in its development. It took lengthy and critical discussions between leaders of the TIG and those who proposed the BDI effort to develop a working relationship. Hopson recalls:

I use this notion as a metaphor, and it's not to suggest that there was anything deliberate or malicious, but it was as if a Trojan horse was coming into the room, and it was laid down before us. I own this statement because in reflection and retrospect, it was as if there was a gift being brought, but no one really knew how that gift was actually going to manifest. But I only say it now in retrospect. I knew we had suspicion about this “gift” of a BDI, and didn't know to what extent that the TIG would be involved since they had not been included in the development of the proposal that was largely focused on issues of diversity in the association.

At that 1999 meeting, Symonette and Ivy Jones Turner were installed as Co-Chairs of the MIE TIG. It was a very contentious time, yet one that we challenged the TIG and those invested in the diversity agenda of the association to transform it into a generative opportunity. Symonette recalls:

So many brittle suspicions and concerns were swirling as we moved into our first meeting as Co-Chairs. It was very unsettling—in fact, quite scary. I resolved to do my best to hold a robust *grace space* for all voices to be heard yet avoid a total meltdown. I tried to steer clear of dwelling in a blame and shame vortex. It was a very difficult time; however, we needed to clear our communications channels in order to craft a more open, trusting and resilient foundation for living-into BDI’s visionary promise.
Birthing GEDI and the Role of GEDI as Leaders

The BDI recommendation that provided the foundation for the GEDI program was initially conceptualized very narrowly as a fellowship for an individual evaluator of color. The fellowship recommendation was the most challenging one for the AEA Board. It was the only one for which a home could not be located within the existing AEA organizational infrastructure. During its early history, this recommendation was a source of difficult, sometimes heated, Board deliberations. Through those deliberations on the GEDI program, the AEA Board shifted from the more internally resource-intensive fellowship initiative to an internship program. This change had important implications for the development, implementation, and impact of the GEDI program; this will become apparent as the history of the birthing of the GEDI unfolds.

Hopson recalls working with Kien Lee of ASDC to act on the recommendation for an internship. The first step was to develop a prospectus that was disseminated through AEA’s network to determine interest in hosting the GEDI. Several proposals were submitted to the AEA Board, one of which was from Hopson; for that reason he recused himself from deliberations about who would provide the first GEDI home. The AEA Board selected Hopson (who hired Prisca Collins as its first coordinator) at Duquesne University to take on that important responsibility, with the proviso that Hopson and his team were responsible for finding funds to support the interns. Hopson provides these reflections on that process:

I just knew that there were enough people who had worked hard enough on this effort through BDI and previous chairs and so forth, that it was going to happen. I mean there was no doubt in my mind that we would birth a baby that would flourish just because of all the love that there was.

It was the 2003 AEA conference in Reno that Donna and I met Teri Behrens at W.K. Kellogg Foundation, who was the director of evaluation, who agreed to facilitate the first chunk of money to support the internship program.

Recall the previously mentioned change from fellowship to internship. Symonette was part of what were challenging AEA Board deliberations:

For a variety of articulated reasons, it was resolved not to support and fund the fellowship recommendation. Instead, the internship concept was advanced as a non-AEA funded initiative. Despite its difficult unfunded birthing, the internship program evolved as a generative opportunity to grow a vibrant community of practice committed to culturally responsive praxis, social justice and transformative change.
Actually, if we had implemented what the recommendation asked for, we would have installed one fellowship per year which would have yielded a *lonely-only* individual navigating new terrain alone. Such a narrowly crafted access agenda would have greatly diminished impact compared to the more expansively generative influence of each GEDI cohort as a mutually-supportive collaborative of learning/development journey partners—a *Posse*-like intervention.

Part of the birthing process of GEDI included a review of what other associations did for fellowships and internships. Hopson wanted to avoid models that provided simply momentary recognition or that provided casual recognition of a group of graduate students at an annual meeting of an association in favor of a model that included deliberate community-building, supportive mechanism of family that supported people across multiple times. And so we wanted to make sure that the internship program had this piece. These were the elements that we knew in building this.

This model for GEDI aligns with the subsequent writings of Meg Wheatley (Wheatley, 2013; Wheatley & Berkana Institute, 2005) on development of leaders through transformative capacity building. Symonette provides this commentary on the connection:

Thinking about Meg Wheatley’s complex systems change work on emergence, I am reminded of her often-quoted mantra: It’s not about critical mass but rather about critical connections. By bringing the interns together in collaborative ways, we helped cultivate critical connections. Common interests brought them into GEDI space as they evolved from a network into a community of practice.

There’s something that emerges in the middle of those developments—from those individual networking activities towards becoming community. That is what I think happened with the interns over the course of that year. I am sensing that even broader and more robust interconnections are starting to emerge. Moving from networks to communities of practice to systems of influence (Wheatley’s 3-stage emergent change model).

Wheatley further describes this phenomenon in terms of an emergence (Wheatley & Frieze, 2006):

Emergence violates so many of our Western assumptions of how change happens that it often takes quite a while to understand it. In nature, change never happens as a result of top-down preconceived strategic plans or from the mandate of any individual or boss. Change begins as local actions spring up simultaneously in many different areas . . . However, when they become connected, local actions can emerge as a powerful system with influence at a more global or comprehensive level.
Wheatley’s work illuminates the dynamics behind the transformative process, the development of the core group of people who are focused on action to address injustices and the difficulty of it, and the need to have coordinated action. Symonette extends the application of these concepts in the GEDI strategies for preparing leaders:

The interns were schooled in—trained and educated in ways that foster expectations that they would not be a bystander to injustice or to evaluation practices that were contrary to contextual and cultural responsiveness. So even if they were not authorized or anointed as the one responsible, they would still find ways to make a difference. In our work, we call this leaderly behavior, in contrast to the more conventional positional leadership.

Through the internship program, we were growing students for leadership in the conventional way as well as for leaderly behavior in carrying forward, progressive messages wherever they found themselves. They were gaining experiences that they needed to serve as boundary-spanning bridge builders for the greater good.

**Implications of BDI and the GEDI: Role of BDI and GEDI in Seeding Other Initiatives in AEA and Beyond**

The role of BDI and GEDI had far-reaching implications for the association and field. Initially conceived to develop constructive and transformative processes of leadership and capacity building at the association and individual levels (Collins & Hopson, 2007), the GEDI program has produced 10 cohorts and nearly 65 participants and alumni.

In addition, major changes in guiding documents for evaluators were seeded by the winds of BDI and GEDI. These include AEA’s (2011) development of the *Public Statement on Cultural Competence in Evaluation*; revisions of AEA’s (2004) *Guiding Principles* to bring greater attention to cultural competence; and the infusion of culture in the *Program Evaluation Standards* (3rd ed.; Yarbrough, Shulha, Hopson, & Caruthers, 2011), not to mention other initiatives such as the Robert Wood Johnson Fellowship Program, which used a similar model influenced by the GEDI program (Christie & Vo, 2011). Hopson commented:

What’s most important to me is that the work from the BDI, from 2001, has seeded a variety of other initiatives and developments in the field and the association. It seeded the Program Evaluation Standards 2nd edition and the cultural reading by the Diversity Committee led by Karen Kirkhart and Melvin Hall (Cultural Reading of the Program Evaluation Standards, 2003). It contributed to the revision of the AEA Guiding Principles, especially a nuanced perspective of culture. These are two major documents that have contributed to how we think about ethical and best practices in the field.
Considering the legacy of GEDI, that story is still worth investigating through an evaluation by the association. GEDI was part of another type of ecological set of changes that took place in systems of transformation that we wouldn’t naturally latch onto. While it was unique in itself—I still think there are more stories that still lay untold about how to use CRE (Culturally Responsive Evaluation) in multiple ways (Stokes, Chaplin, Dessouky, Aklilu, & Hopson, 2011)—it was part of a larger system of really repositioning and thinking about the association and how we think about evaluation.

To which Mertens responded:

I started thinking about how the diversity initiative really took an overall cultural change in the organization. And so the internship was one of those manifestations in that it changed the gestalt of thinking, whereas before I don’t feel like diversity was on the radar screen in any conscious way. And then through all the work of the people through the years on diversity initiatives and the increased inclusiveness in the board representatives, and the creation of the diversity committee; this was evidence that a shift in the consciousness of the organization to address diversity issues was occurring throughout AEA.

And the question could be raised without any real way to answer it: would the internship program have been successfully endorsed by the organization if it hadn’t come at a time when there was momentum? But, really, I mean, my vision of it is a spark coming through and shaking and waking people up and saying there’s got to be some real cultural shift throughout the organization of what we attend to. BDI and GEDI represent both a beginning and ongoing momentum for AEA to address issues of diversity in a conscious way—not limited to race—but inclusive of all dimensions of diversity that are used as a basis for discrimination and exclusion.

Symonette’s thoughts provide an elegant closure to these reflections on the impact of the BDI and the GEDI on AEA and the evaluation profession:

I think that both BDI and GEDI opened up new and different positive provocative possibilities and opportunities. GEDI cohorts have continued in a generative way to open promising pathways embodied in their presence and the ways they have impacted so many. I use “impact” very broadly, not just in terms of the things that are countable like presentations and leadership positions, but also in the ways in which they move in the world differently with a different kind of portfolio or knapsack than those who have not had that kind of experience. And, most importantly, they share their gifts so that their impact is generative beyond just the boundaries of who are GEDI and who are not.
I think we’re seeing it move beyond those boundaries, and so the way was opened for them and then they continue to open the way for others by the way they walk in the world and by the way that people who supported them gaining that new walk were impacted. I think those of us who were sharing in those presentations and trainings were also transformed by them.

So, there was an unleashing of talent and ideas at all stages and phases because it was more emergent and developmental than it was a rollout of a conventional curriculum, where the parameters of the domain were fully known. There was a willingness to allow that to morph through making the path as we walked it. In fact, if we had more robust funding with plenty of strings attached, that kind of generative morphing probably would not have occurred to the extent that it did. And so, that too, was a gift and a blessing.

Postscript
This chapter has explored the historical framing for the development and implementation of the American Evaluation Association’s Graduate Education Diversity Internship (GEDI) program, the first recommendation of the Building Diversity Initiative (BDI). The GEDI program was birthed out of larger discussions, movements, and developing literature in the association and the field as a whole. That the GEDI program did not exist in a vacuum is an important observation and reveals how the GEDI program framework required a collaborative effort of leaders and champions in the association. These same leaders and champions developed curricula material for seminars, served as mentors, and provided career development opportunities for GEDI during and after completion of the program. This larger socialization in the program, in the association, and in the field were key components of ways to develop a sustainable structure for developing evaluation leaders through the GEDI program.

Through our transcripted discussion and reflection on the program’s developments and implementation, we authors highlight larger issues on the verge of the Association’s larger turn and more robust consideration of issues around diversity, race, and culture in the evaluation field. That is, we display the synergies created by BDI and subsequent transformation of the association as a more culturally responsive organization. It is no surprise in reviewing the history of the birthing of GEDI for instance that then current and future Board members and TIG leaders were ensuring that the internal structure of AEA was receptive for the BDI implementation processes. Although GEDI development was the most challenging and arguably the most transformative of the recommendations, the success of the BDI went beyond the development of the GEDI program only (Peak, Peters, & Fishman, 2007). The additional 13 recommendations were as vital to the work of the association as the GEDI recommendation.
By exploring the larger issues of organizational change, power dynamics, diversity, and cultural responsiveness as groundings for creating and sustaining the GEDI program, at least two goals have been accomplished in this chapter. One goal is intended to provide a historical record of the GEDI program through the reflection and narrative of key thought leaders in the evaluation field. A second goal is to provide insights for others who are interested in pursuing similar efforts related to building and sustaining pipeline and pathway efforts in associations and agencies for years to come. For instance, whereas the GEDI (and BDI) are specific to the organizational and institutional context of the American Evaluation Association, those champions of diversity efforts in other professional associations would be wise to ensure that sufficient practical and scholarly knowledge is understood, as was provided in the BDI through document reviews, surveys, and use of an advisory board. Additionally, champions of diversity in other associations or institutions ought to ensure stakeholders are included and collaborated with in ways that emphasize the benefits of participating individuals and the organization (or field) more generally. In this way, champions of diversity can leverage their full arsenal of support in funding and networking across a variety of levels to ensure the lessons learned from these efforts are deliberate and sustainable.

Appendix


- **Recommendation 1** — Create a graduate education fellowship program targeted at students of color.
- **Recommendation 2** — Tap into existing educational pipeline programs to expose students of color to evaluation as a career choice.
- **Recommendation 3** — Work with Historically Black Colleges and Universities, Hispanic Serving Institutions, and Tribal Institutions to increase the profile of evaluation as a career choice and to support the creation of evaluation training courses and programs.
- **Recommendation 4** — Create “guaranteed” training sessions at the annual AEA conference to address the professional development needs of evaluators of color and cross-cultural evaluators.
- **Recommendation 5** — Create nontraditional training opportunities for people doing evaluation work, but who do not identify themselves as evaluators.
- **Recommendation 6** — Organize small business development training for evaluators of color who want to start evaluation consulting firms.
- **Recommendation 7** — Provide financial incentives for evaluators of color and all cross-cultural evaluators to participate in professional development and training opportunities.
• Recommendation 8—Create a Council of Evaluation Training Programs (CETP) to serve as a forum to discuss issues of diversity and cultural competence as they relate to training and evaluation.
• Recommendation 9—Create and promote a “What Is Evaluation?” campaign.
• Recommendation 10—Engage in a public education campaign to emphasize the importance of cultural context and diversity in evaluation for evaluation seeking institutions.
• Recommendation 11—Incorporate diversity issues into the review of the Program Evaluation Standards.
• Recommendation 12—Advocate for the creation of an affirmative hiring policy for foundations and state and local governments.
• Recommendation 13—Encourage mentoring for evaluators of color and for those seeking cross-cultural evaluation experience.
• Recommendation 14—Work with diverse organizations to publicize job opportunities to evaluators of color.

Note

1. The 14 BDI recommendations were divided into four areas: pipeline, professional development, work access, and recruitment; see the Appendix to this chapter for the full list.

References


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