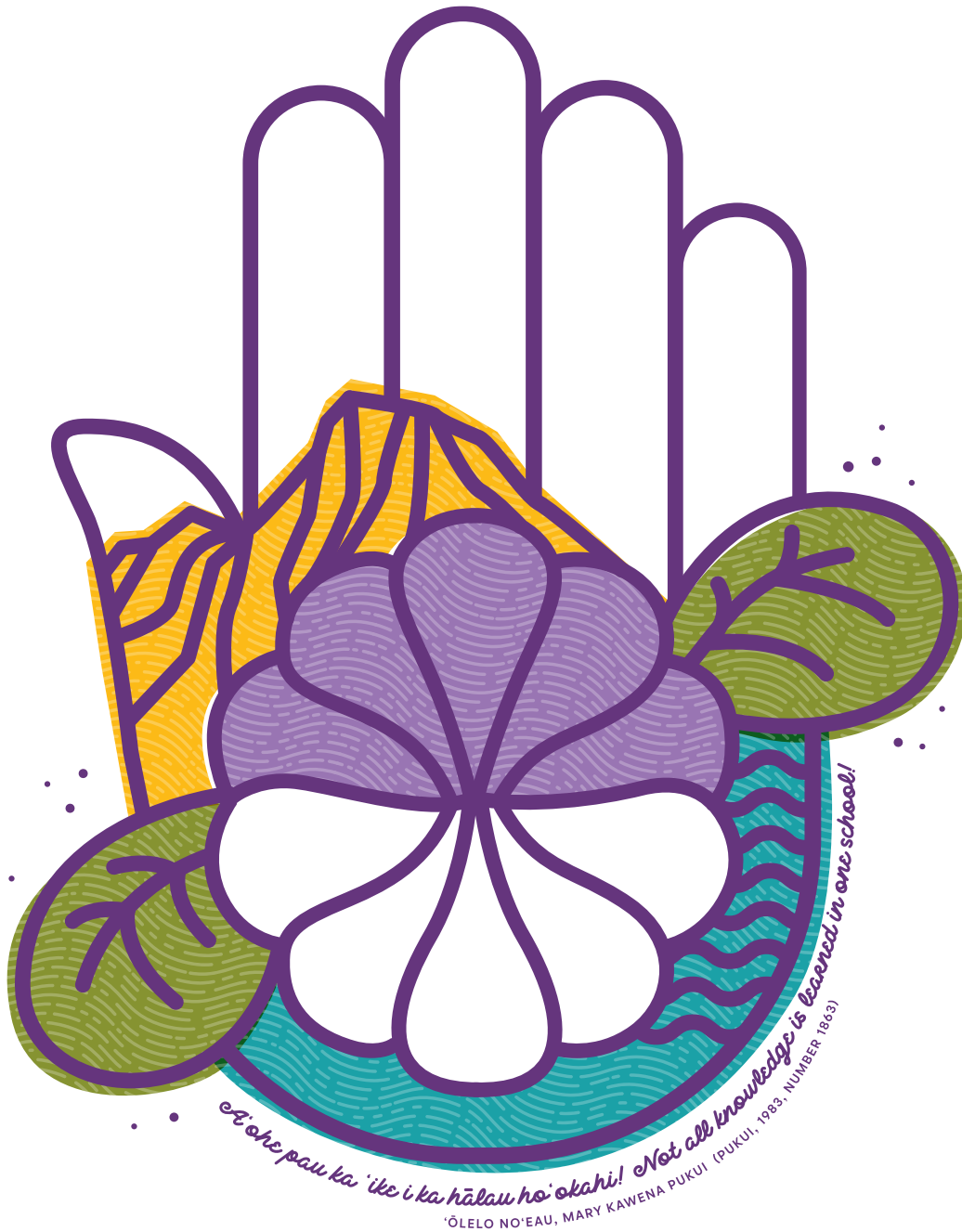


# Evaluation

# with Aloha



A Framework for  
Working in Native  
Hawaiian Contexts

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# Welina Mai Kākou

July 2019

Aloha 'Ohana:

I have been struggling with the notion that there is an Aloha Framework that will help to guide us, challenge us, help us decide on how we can both respect diversity and differences in perspective, values, behaviors and actions, yet can offer us a measure of certainty, consistency and peace in spite of the complexities, turbulence and mysteries of modernity, change, injustice and history.

I can only offer you one pathway of decision framing and making: Aloha, as articulated and lived by Aunty Pilahi Pahi is not one thing but is a process and layered reality and is itself A Way of being, of seeing, of doing. To remind us: We must act with/in:

<b>Akahai:</b>	kindness, to act and to speak with kindness
<b>Lōkahi:</b>	unity, to bring about harmony in spite of differences
<b>'Olu'olu:</b>	pleasantness, internal peacefulness
<b>Ha'aha'a:</b>	modesty, humility, openness
<b>Ahonui:</b>	patience, waiting for the ripe moment – to persevere

Make no mistake: Aloha is hard to do, to achieve, to internalize, to practice every day with each interaction. Aloha is my way of prayer, my challenge, my practice, my Way.

Aunty Puanani Burgess

# ORIGIN STORY

In our time-honored quest to seek knowledge, we first walk in the footsteps of our ancestors. They possess and pass forward their powers of observation, interpretation, and application to live life in harmony with our surroundings. Content and context are inextricably intertwined if we discover a way to enter and be amazed. Quantitative and qualitative ways of knowing play equal roles in examining and expanding the depths of our knowledge.

**T**he Culturally Responsive Evaluation and Assessment-Hawai'i (CREA-HI) hui began meeting in 2014 as a group of evaluation professionals and other community practitioners seeking to uplift Indigenous paradigms in evaluation. Years of regular, iterative circles at the Consuelo Foundation fostered layers of relationships, practice, and profound dialogue. The hui (partnership) consists of individuals from across the spectrum including elders and practitioners and users of evaluation. Hui members are associated with a wide array of organizations—ranging from state agencies to large and small charitable institutions to community-based organizations—all with a focus on serving Native Hawaiians and predominantly Hawaiian communities.

In 2015, as we talked about our collective purpose, our highest priority was to influence the practice of evaluation and assessment in Hawai'i to be more culturally-responsive and sustaining. To reach beyond our hui, we believe we need to share our beliefs and practices with a wider audience. It is our aspiration that the *Aloha Framework* will help guide the practice of evaluation in Native Hawaiian contexts—ensuring that evaluation is conducted in ways that are respectful of Native Hawaiians, their culture, and their rights as an Indigenous people to perpetuate their culture and self-determine their future pathways.

The *Aloha Framework* is humbly and respectfully offered to evaluators, those who commission evaluation services, and those who participate in or are otherwise stakeholders in evaluations conducted in Native Hawaiian contexts. It is our hope that evaluators will use this document to reflect on their practice and be inspired to share their successes and challenges, that evaluation funders will use this document to guide the solicitation and selection of evaluators, and that the communities and organizations who are impacted by and who are (ideally) participants in evaluations will use this document to ensure their voices are fully and fairly represented. (Note, communities is used in this document as comprising regions or locales or social or affinity groups.)



**It is interesting to note that in Hawaiian, the past is referred to as *Ka wā mamua*, or “the time in front or before.” Whereas the future, when thought of at all, is *Ka wā mahope*, or “the time which comes after or behind.” It is as if the Hawaiian stands firmly in the present, with his back to the future, and his eyes fixed on the past, seeking historical answers for present-day dilemmas. Such an orientation is to the Hawaiian an eminently practical one, for the future is always unknown, whereas the past is rich in glory and knowledge.**

(Kame'eleihiwa, 1992, pp. 22–23)

# Naupaka: The “Imperfect” Perfection of Wholeness

**THE NAUPAKA FLOWER** is our metaphor for Aloha in evaluation research. To many eyes, the naupaka flower appears to be half a flower—incomplete, deficient, lacking, or undeveloped. However, the flower is indeed whole; it thrives in nature, oblivious to the idea that five petals in a semi-circular shape are somehow imperfect. The idea of imperfection is an interpretation that comes through our own cultural lenses. We, and not nature, are imperfect in our perception of beauty.

Similarly, communities are often misunderstood when observed from an outside perspective. Native Hawaiian communities have experienced judgment and bias from well-intentioned individuals and institutions who have sought to help. Damage occurs when the cultural

functions of community practices and relationship paradigms go unrecognized or are dismissed. Further damage occurs when behaviors stemming from experiences such as cultural and historical trauma are pathologized and misinterpreted as endemic to traditional cultural values and lifestyles. Such assumptions foster and reinforce the use of deficit-based theories in evaluation and lead to designs that intentionally focus on the program funders’ or evaluators’ perceptions of needs or problems in a community. This “half flower” perspective is oblivious to the history, strengths, assets, and aspirations of the community.

Our reflections on the beauty and completeness of the naupaka urge the evaluator to reflect on self and context to develop fuller, richer theories that go beyond what may be immediately apparent and lead to more valid and useful evaluations. We ask: What is happening here? What rules, protocols, and paradigms guide (and limit) our understanding? What assumptions or judgments do we bring? What is seen and unseen? How do we see wholeness from the community’s perspective, instead of imposing our own views? How do we equalize power imbalances in relationships among stakeholders in the evaluations—including our own inherent power as evaluators? (See the Appendix for a fuller telling of the story of the naupaka.)



**Culture is not neutral. Cultural groupings are ascribed differential status and power, with some holding privilege that they may not be aware of and some being relegated to the status of “other.” For example, language dialect and accent can be used to determine the status, privilege, and access to resources of groups. Similarly, in some contexts, racialized “others” are framed against the implicit standard of “whiteness” and can become marginalized even when they are the numerical majority. Cultural [and evaluator] privilege can create and perpetuate inequities in power and foster disparate treatment in resource distribution and access.**

(American Evaluation Association, 2011, p. 7)

The *Aloha Framework* is grounded in the professional experiences of the authors and reflects the advice of many of persons practicing evaluation in predominantly Hawaiian contexts. We have attempted to faithfully reflect the mana (spiritual energy and understanding), ‘ike na‘auao (wisdom), and place-based knowledge offered by our kūpuna (elders) to guide this work.

## Backdrop

There is a long history of harm to Indigenous peoples stemming from research and evaluation conducted in ways that are disrespectful to their culture, history, and values (Meyer, 2003; Smith, 2012). In recognition of this, the members of the American Evaluation Association (AEA) have affirmed the importance of cultural competence in evaluation (American Evaluation Association, 2011). The AEA statement on the importance of cultural competence calls out general issues that are typically present when working in Indigenous and minority contexts. Many of these issues are relevant at all stages of any evaluation engagement. The recently revised AEA Guiding Principles (American Evaluation Association, 2018b) demonstrates an increased awareness and acceptance of the importance of cultural competence and responsiveness compared to previous versions. These practices are referred to in three of the five principles: Competence, Respect for People, and Common Good and Equity. And the newly published AEA Competencies calls on evaluators to focus on “understanding the unique circumstances, multiple perspectives, and changing settings of evaluations and their users/stakeholders.” (American Evaluation Association, 2018a).

While descriptions of Indigenous evaluations exist in the literature, only a few Indigenous frameworks have been published (Uemoto, 2016). This gap in the literature illuminates the need to share frameworks grounded in Indigenous epistemologies that may be helpful to guide evaluation with Indigenous peoples.

**Philosopher, healer and professor,  
Manulani Aluli Meyer writes:**

Hawaiian epistemology is a study of difference. Because formulating ideas in Hawaiian epistemology needs contrasts from which to emerge, descriptors such as ontology, empiricism, rationality and objectivity are used. And so, the risk is inherent: how does one discuss oranges with an apple vocabulary? Herein lies the subtle paradox—how to discuss Hawaiian beliefs in a structure that is set up to engage them at best, semiotically, and at worst, as quaint anthropological stories of a distant land (Geertz, 1983). It is a struggle that is made conscious in every epistemological image and description.

(Meyer, 2003, p. 76)

The gap is particularly important given the diversity among Indigenous contexts. The importance of this work is also supported by the words of other Indigenous practitioners such as Maori, American Indians, and Alaska Natives (for example, see Stewart-Harawira, 2005).

This document lays out a Native Hawaiian perspective on culturally-responsive and sustaining evaluation. While recognizing the importance of protocol as ways of acknowledging and honoring cultural values, evaluating with Aloha is, at its core, a respectful way of being in the evaluation space.

The value of Aloha has many meanings. It is a way of life, a mindset, and a foundation upon which we live. It defines who we are and why we are here, and how we interact. It is a natural response of gratitude, humility, respect, unity, and love. It is reciprocal. It is a commitment to accepting others and giving dignity to who they are and what they offer. It is a principle that conveys the deepest expression of one's relationship with self, family, and community. Engaging with others with Aloha is a central tenet of evaluation within a Native Hawaiian and Hawai'i context and may be applicable in other contexts.

Evaluating with Aloha is also Indigenous evaluation. Consequently, these core beliefs also inform our approach:

- Native Hawaiian evaluation must honor ea: the kuleana (responsibility and privilege) of a people to make sovereign decisions and to perpetuate and live in ways that reflect their worldview and way of life. Ea is a right of individuals, the 'ohana (family units), kaiāulu (communities), and the lāhui (nation);
- As evaluators working in Native Hawaiian contexts, our highest kuleana is to intended beneficiaries and their communities;
- Evaluation should (minimally) support or (optimally) advance the perpetuation of Native Hawaiian culture and ways of being and knowing ('ike Hawai'i, 'ike nohona); and
- Evaluation *practitioners and practice* must be pili (closely entwined) with key stakeholders, including the intended beneficiaries of the program, service, policy or other evaluand (object of an evaluation).

When practicing evaluation with Aloha, a vast array of methodologies are possible—ranging from those that are grounded in Hawaiian ways of knowing and being to those that are grounded in Western social sciences.

A full description of methodologies that may be used when evaluating with Aloha is beyond the scope of this document. Recalling that evaluation is a particular form or purpose within the broader domain of social science research, we see strong connections to many publications by Indigenous researchers and evaluators (Chilisa, 2012; Kovach, 2009; Smith, 2012; Wilson, 2008) and by advocates for the potential of evaluation to promote

**Makeke Stewart-Harawira writing about the importance of Indigenous worldviews and cultural knowledge notes:**

...the construction of pedagogies which articulate a different vision for global order has become a contested and critical task. This article argues two things: first, that the study of culture and ethnicity is vitally important in developing pedagogies for better ways of being in the world, and second, that Indigenous cultural knowledge is profoundly relevant to this endeavor

(Stewart-Harawira, 2005, p. 153).

social justice (for example: Mertens, 2008). In particular, we note the recent writings of Manulani Meyer and Kū Kahakalau in *'Imi Na'auao: Hawaiian Knowing and Wellbeing* (University of Hawai'i-West O'ahu, 2019). They write eloquently about the kuleana of researchers in 'Auamo Kuleana, Ho'opono: 'Imi Na'auao (Meyer, 2019) and about a new-old culturally-responsive and sustaining methodology: Mā'awe Pono (Kahakalau, 2019).

Another anthology of excellent and recent writings about Hawaiian research methodologies is *Kanaka 'Ōiwi Methodologies: Mo'olelo and Metaphor* (Oliveira & Wright, 2016). Examples of Indigenous evaluation in non-Hawaiian contexts are available in *Indigenous Evaluation* (Cram, Tibbetts, & LaFrance, 2018).

Evaluators should mindfully select and adapt from the array of Hawaiian and Western methodologies to honor the rights of Hawaiians to ea and to generate valid, actionable knowledge.



# Aloha in Evaluation

**W**hen we think about the competencies evaluators must develop and bring to their work, Western-trained evaluators tend to think about domains such as professional practice, methodology (theory and technical skills), understanding of the evaluation context, project planning and management, and interpersonal skills. (See the American Evaluation Association’s Competencies for Evaluators, 2018a)

We assert that Aloha is the foundational intelligence we must activate in evaluation and that it has primacy over all other values or competencies: without a commitment to evaluation with Aloha, strengths in all other competencies fall short of fulfilling our kuleana.

Before moving into a direct discussion of Aloha, it is helpful to have a understanding of the Hawaiian concepts of mana and kākou. A recent exploration of mana concluded that “there is no English translation of mana that fully captures its meaning and significance from a Native Hawaiian perspective.” (Crabbe, Fox, & Coleman, 2017, p. 20), For our purposes here, mana may be loosely translated to English as “spiritual power.” In ancient Hawaiian society, Native Hawaiians believed that the gods were both their ancestors and the primary source of the mana, which was embodied in the land, in objects and forces, and in kānaka (people/Native Hawaiians) themselves (Haertig, Pukui, & Lee, 1979).

Kākou is one of plural pronouns in the Hawaiian language and refers to a group of three or more people (including the speaker). All Hawaiian plural pronouns denote the collective mana that is created with the coming together of each group. It is arguably the reverence for shared mana that is at the root of the value of Aloha.

To practice evaluation with the intelligence of Aloha invokes and goes beyond common understandings of what it means to understand and be responsive to context and to have well-developed interpersonal

skills. It also transcends typical use of the collaborative, participatory, and empowerment methodologies. Woven through Aunty Pilahi Paki’s description of Aloha is the practice of living in a space of respectful relationships: honoring the mana, histories, talents, and other resources of the community, evaluand, and the evaluator. The evaluator must practice kilo (close observation) of self to develop and sustain the intelligence of Aloha in everyday practice.

In the following sections, we bring together the lessons of the naupaka—particularly the importance of seeking to understand—and the meaning of Aloha, to describe what these two lessons tell us about the respectful and responsible practice of evaluation in Native Hawaiian contexts.

There is a very, very different way of looking at knowledge if you are a Kanaka in terms of kapu, in terms of sacredness, in terms of where it comes, and in terms of your kuleana to it. If you do not have a kuleana to something, you should not be going there. If you have a kuleana it means being from a community in which you have a stake that everyone recognizes; it is not something you can claim. One does not just get a kuleana, one is always given a kuleana. One is always handed it after some kind of training. So this is not about race, not about ethnicity; it does not have to be about koko. It has to be about, Does the community recognize you? If they do, then you have a kuleana.

Jonathan Osorio as cited by Summer Maunakea (2016, p. 150).

We draw upon the wisdom of one of our renowned Hawaiian kūpuna, Aunty Pilahi Paki (n.d.), who defined Aloha as the following:

**A**

represents **Akahai** which means kindness (grace) expressed in tenderness

**L**

represents **Lōkahi** which means unity (unbroken) expressed with harmony

**O**

represents **‘Olu‘olu** which means agreeable (gentle) expressed with pleasantness

**H**

represents **Ha‘aha‘a** which means humility (empty) expressed with modesty

**A**

represents **Ahonui** which means patience (waiting for the moment) expressed with perseverance

# Activating Aloha in All Stages of Evaluation

Although we understand that the value foundations of an evaluation form an integrated whole that shapes all its parts, for the purpose of discussion, we organize evaluation into four phases:

- 1 **Pilina Ho'ohana a me ka Hana Hilina'i** (building relationships and creating trust),
- 2 **Ho'okahua** or setting the foundation (design and instrumentation),
- 3 **Mo'olelo** (data collection and analysis), and
- 4 **Hō'ike** (reporting and use).

Furthermore, we offer in each stage of evaluation a set of questions that may help the evaluator and other stakeholders reflect on how the value and intelligence of Aloha is, or is not, guiding the evaluation.

## **Pilina Ho'ohana a me ka Hana Hilina'i (Building Relationships and Creating Trust)**

Evaluation is an act of engagement and re-engagement between the evaluator, the evaluand, and stakeholders across the life of a project to heighten trust and agreed upon ways of relating. Within an island context like Hawai'i, evaluators often share relationships with the funders, evaluand, and other stakeholders that precede a particular evaluation study. Similarly, relationships often extend beyond the "end" of a project, and we briefly introduce protocols and practices that evaluators can keep top of mind to navigate this expanded relational space.

Even when an evaluator comes from a community and is familiar with its norms, community perceptions of the evaluators as trustworthy should not be assumed. Entering from a place of cultural humility by asking permission, seeking a common understanding, and establishing or re-establishing credibility are important protocols in Indigenous communities. Likewise, if an evaluator is contracted by a funder, then the evaluator must consider the community's perception of and experience with that funder. A colleague shared the story of being contracted by a well-known Western museum to collect data in her home community. She returned home, after living away for college, and assumed (as did those who hired her) that, because she was pili to the community, the strengths of her

existing relationships would make it easy to engage with members to access their 'ike. What she found was profoundly different. The community responded to her not as a member but as a representative of the external agency and feared that they might be exploited yet again. With time and by demonstrating the values of Aloha and ha'aha'a, she eventually gained their trust in her in the researcher role and went on to serve both her community and the institution.

When there is no direct, pre-existing relationship, engagement can be activated through second- and third-degree relationships or by approaching community leaders as kia'i (protective guardians) of communities. It is important to note that Western-trained evaluators may see community leaders



Respectful behavior calls on researchers to unpack colonial assumptions of dominance and to recognize bias in their own social, political, economic, and spiritual perspectives. The process of unpacking is similar to what Aunty Pilahi Paki refers to as ha'aha'a, entering a space with emptiness. In this space, an evaluator greets others with an openness to receive new understandings, perspectives, and 'ike (knowledge) that may unfold. Guesthood may include tangible expressions of humility and gratitude such as bringing and receiving food and other cultural offerings.

as key informants and that although the leaders may chose to perform this function once trust is established, their role as guardians is primary. Treating kia'i as key informants before they offer to engage in this way can lead difficulties in establishing trust.

Morelli and Mataira found that requesting "guesthood" (Harvey, 2003), and approaching Indigenous Native Hawaiian organizations and communities with humble respect, resulted in mutual learning, mutual respect, and relationships that lasted beyond the life of the project. Their experiences with Indigenous partners taught them Strengths Enhancing Evaluation Research (SEER) principles and related behaviors to establish and maintain relationships in communities (Morelli & Mataira, 2010).

Respectful behavior calls on researchers to unpack colonial assumptions of dominance and to recognize bias in their own social, political, economic, and spiritual perspectives. The process of unpacking is similar to what Aunty Pilahi Paki refers to as ha'aha'a, entering a space with emptiness. In this space, an evaluator greets others with an openness to receive new understandings, perspectives, and 'ike that may unfold. Guesthood may include tangible expressions of humility and gratitude such as bringing and receiving food and other cultural offerings.

In Hawai'i, communities often place more emphasis on the evaluator's values, relationships, and experiences than on professional credentials. This does not mean credentials as qualifications to do the work are unimportant. However, an evaluator who leads with professional credentials is likely to be perceived as self-important and pretentious, emphasizing the "I" over the "we" (Blaisdell & Mokuau, 1991). In a Native Hawaiian context, the protocol of introduction, at its essence, seeks to uncover connection and identity. Hawaiians often ask the question "o wai kou inoa?" which may be understood by the less informed individual as "what is your name?" (a literal translation). Unfolding the question reveals a deeper meaning of "who are your names" and privileges the importance of sharing your genealogical identity. The ancestors invoked in your name, the places and place names significant to your ancestors, and your ancestors' relationships to other families inform communities about shared experiences, how you are related to the community, and the values you are likely to bring to the relationship. The identity of an evaluator is a critical element of credibility in Native Hawaiian communities.

Evaluating with Aloha intentionally elevates, amplifies, and privileges community voice and perspectives. Combined with culturally-responsive and sustaining practices, community-based and participatory evaluation principles can guide evaluators, holding them accountable to the communities who are stakeholders in an evaluation. Forms of this accountability include, but are not limited to, the following principles and guiding questions.

*The evaluator and evaluation shall contribute to the abundance of communities and honor historical, present, and future contexts through a Hawaiian worldview.*

- How is “community” defined for the particular evaluation?
- Who establishes the “Why” of the evaluation?
- What community or group gives the evaluator “permission”?
- Who is the evaluator in relation to the community (i.e., positionality)?
- How is the “voice” of the community heard, processed and reported?
- How has the evaluator acknowledged kūpuna, mākuā, ‘ōpio voices in the evaluation?
- How is the evaluator intentionally acknowledging, honoring and presenting a Hawaiian worldview in interpersonal interactions and in the design and instrumentation of the study?

## Ho‘okahua (Design)

As noted earlier, the evaluating with Aloha is about a way of being and interacting as an evaluator working in Hawaiian contexts. Many Hawaiian and Western research and evaluation methodologies may be used while evaluating with Aloha. Earlier we identified some of the more widely recognized Indigenous and Hawaiian methodologies. Within mainstream evaluation, collaborative and participatory evaluation approaches (including empowerment evaluation) and developmental evaluation are well-established, theoretically-based models that promote the inclusion of community voice and recognize the complex relational dynamics in systems.

In privileging the community’s voice and perspective, the “Why?” of any study is first and foremost established to contribute to the abundance of that particular community, regardless of the “community” definition (e.g., region, locale, social, or affinity group). To privilege community voice requires attention to the dynamics of power and privilege in the evaluation context.

In the Indigenous, Hawaiian, collaborative and participatory, and developmental approaches the role of the evaluator is one of a facilitator or guide in the evaluation process, thereby elevating the perspectives and voices of participants representing a broad spectrum of stakeholders (for example, see Cram, 2018; Fetterman, Rodríguez-Campos, & Zukoski, 2018; Kawakami, Aton, Cram, Lai, & Porima, 2007).

An evaluator who has collaboratively established the why of the evaluation study in the Pilina stage is well poised to co-create the what in the form of key evaluation questions in the Ho‘okahua stage.

After reaching consensus on key evaluation questions, the options for design (the how of the evaluation) can be determined. Although the evaluation purpose and key questions drive the design of the evaluation, it is strongly recommended that mixed methods approaches be used. (Mixed methods studies include both quantitative and qualitative methods and data.) In general, quantitative designs include experimental, quasi-experimental, (e.g., time series, single case), and non-experimental (e.g., surveys, cross-sectional, longitudinal) methods. The more common qualitative designs include ethnography, phenomenology, narrative, and case studies.

The primacy of quantitative or qualitative inquiry within the evaluation can be determined by the type of question; however, a Native Hawaiian worldview is inherently holistic and therefore the evaluator should seek to guide the community in developing the most comprehensive story possible to address the evaluation purpose and questions.

For example, a mixed-methods approach to determine the success of a community-based family program to decrease obesity and increase healthy eating behaviors might use a quasi-experimental design to determine whether participants lost weight and reported healthier eating (e.g., examining data on changes in participants' weights and diet over time). This quantitative study could be accompanied by a series of case studies to determine the contexts within which participants were more successful and those in which they were less successful including cultural beliefs and preferences around food and social practices related to meals.

When evaluating with Aloha, the key principles and guiding questions would include, but not be limited to the following:

*Communities have the authority to provide input and direction to the studies and outcomes of studies. How is this authority exercised?*

- At what stage is community involved?
- Can the community refuse to participate in the evaluation?

- Who has the final say on the key evaluation questions?
- What do we know and need to know about relationships, particularly regarding power and how power impacts what people will share (e.g., kūpuna first)?

## Mo'olelo (Data Collection and Analysis)

### Data collection

A myriad of data collection strategies is available to an evaluator using mixed methods designs. Quantitative methods tend to use measures, instruments, or assessments that often produce scores which are then analyzed using statistical techniques. The primary data collection strategies for qualitative methods are observation and interviews. It is not within the scope of this document to detail the various data collection strategies. There are excellent texts available, such as [Social Science] *Research Methods Knowledge Base* (Trochim & Donnelly, 2008) and *Qualitative Research & Evaluation Methods* (Patton, 2015). More specialized information is available in texts such as *Mixed Methods*

### Describing the Moloka'i Subsistence Study, Davianna McGregor reported:

The community approach that we use is actually called "participatory action research." That is what the academy calls it, but it is very much community-based research—the idea being that it is participatory with the community, and it is action-oriented and geared toward a purpose... we met with the community, and we decided to develop a multimethods approach... We were very fortunate to have students from the community help conduct the survey, and we worked with the community to help develop a set of questions. We relied on people from the community...

As cited by Summer Maunakea (Maunakea, 2016, p. 152)

### Describing the application of Mā'awe Pono, a Native Hawaiian research methodology, Kū Kahakalau calls out the importance of community participation:

...community collaborators were essential to leverage insider knowledge and assure that the research actually addressed their needs and found solutions that worked for them. This process also validated the experiences of the participants, assisted in the development of critical skills, and elevated community members to expert status. Moreover...by becoming collaborators, rather than merely subjects, the co-researchers played a crucial role, not just in the gathering, but more importantly in the interpretation of the data

(Kahakalau, 2019, p. 28)



The capacity of Indigenous peoples to undertake their own evaluations, combined with Indigenous-controlled engagement with any non-Indigenous technical and other support required throughout the evaluation process, will help ameliorate Indigenous people's past grievances about evaluations that were done to them rather than with them. This requires the recognition that Indigenous peoples have the skills and expertise to work as evaluators... In Australia, moves toward re-empowerment began in the 1990s when evaluators started using more participatory and inclusive methods that built to the involvement of Indigenous peoples in evaluation teams, and then to Indigenous leadership of some evaluation teams. There is still some way to go, however, to achieving widespread opportunities for Indigenous evaluators to work as Indigenous peoples rather than as generic evaluators.

(Cram, 2018, p. 124)

in *Social Inquiry* (Greene, 2007) and in *Transformative Research and Evaluation* which promotes the use of evaluation to achieve social justice (Mertens, 2008).

When evaluating with Aloha, the importance of including community as much as possible in the data collection process cannot be overstated. Community members can be trained to administer surveys, facilitate focus groups, conduct interviews, and to be observers. Engaging community in this way builds capacity, validates the value of their contributions, increases trust in the evaluator, and enhances the credibility of the evaluation.

### Data Analysis

In the same way that community members can be trained and engaged to collect data, they can be trained to participate in the data analysis process. The evaluator, as facilitator or guide, can help community members understand and use their own data. Engaging community members in qualitative analysis of interview and observation data is especially valuable as they bring nuanced understanding of the language, terms, references, and relational dynamics including social group norms to the analysis and interpretation of the data. Community member participation in the interpretation of quantitative data is also critical as they may provide essential contextual information.

Key principles and questions related to data collection and analysis would include, but not be limited to, the following:

To the extent feasible, community members should be included in the gathering and interpretation of data.

- Were meaningful opportunities to engage in data collection and interpretation of findings made available to community members?
- Did the training for community members increase their knowledge and skills in ways that will benefit them and their community in the future?
- How are competing interpretations addressed? Competing values and expectations?
- What role does ancestral knowledge, revealed knowledge, and spirituality play?
- Who is the final author of report (i.e., final decision maker about what is included in reporting and how it is represented)?

### Hō'ike (Reporting and Use)

In the final phases of evaluation, we continue to reference the primacy of context, illuminated throughout this document, as well as the principles of respect and equity. Aloha in evaluation is a journey of building trust and respect.

To ensure a respectful, equitable, and accountable evaluation process, reporting and use is a shared responsibility between the evaluator and the community. Still, the highest duty, particularly for the evaluator, is to maximize the benefits and minimize the risks to the community. Reporting evaluation results begins



Many times when we went to talk to people in the community they would say, “I’ve been concerned that researchers come and get all this information and I do not know where it goes, I never see it, and then it just ends up on some shelf.” So we were very committed to making sure that they saw what our findings and our conclusions were and that they had input in the recommendations that arose from the findings. We reserved money to duplicate the reports so we could give them copies.

Davianna McGregor as cited by Summer Maunakea (2016, p. 155).



with the protocol of asking for permission, and, if granted, does not mean the evaluator has unlimited use or is the owner of the data and findings. Consent to use must be granted each time the evaluation is shared, unless broad permission was given by the community. Additionally, to heighten credibility and further build evaluation capacity, community member participation in reporting (including authorship of reports) remains essential.

Agreement between the evaluator and community brings forward important considerations:

*In agreement with the community, the evaluator shall share findings in a timely manner and in ways that are accessible to community members.*

- To what extent are the voices and needs of intended beneficiaries at the center of the findings?
- Do the findings contribute to the wellbeing of the community?
- To what extent do the benefits and lessons learned promote ea or the self-determination of the community?
- What role does the community play in reporting the findings, and who shares in the credit for the evaluation study and reporting?
- Are results accessible to different stakeholder groups?
- How is the privacy of individuals and the community appropriately protected?
- Are the likely consequences of the report(s) fair and just? Do the consequences maximize benefits and minimize harm?

## Further Reflections on the Dynamic of Context and Content

As we bring our exploration and explication to a close, we want to revisit the idea of context and weave in additional dimensions of content for the consideration of the evaluator and other stakeholders.

Context defined as “honua” includes family, school, community, ahupua’a, island, and special culturally-significant places, such as wahi pana and pu’uhonua. Honua is also about the internal and

The ‘āina teaches us about sustenance and abundance, connection and mehameha. There is much for us to learn from our ‘āina, and we may be generations away from restoring the pili that was known by our kūpuna. Our collective efforts move us closer to understanding the ways in which our kūpuna knew and were a part of our ‘āina: we explore ancestral memory to recall the models and systems of the past, fashioning the tools of the future and fitting them to our purpose”

(K. Beamer, 2014, p. 61)

external components that contribute to learning, which includes inter- and intra-generational relationships that are key in defining our place in our culture and who we are as a people. It is also helpful to remember that honua or place includes the concept of time: how the evaluation is informed by and contributes to the history, flow of knowledge, and wellbeing of a people—past, present, and future.

Content is defined as knowledge, both cultural and academic, as well as the language and values of the culture that are reflected in day-to-day living. In Hawaiian, this is called a’o, the reciprocal exchange of knowledge. Cultural content includes the protocols and practices that are necessary to understand how each person relates to the honua (context or place) of their learning. Understanding this critical dynamic of context and content or ways of viewing and understanding the world from an Indigenous paradigm have often not been validated by Western epistemology or science.

Culturally-responsive and sustaining evaluation has its roots in Indigenous wisdom and the evolution of culture-based education. In a Hawaiian context this requires the full integration of an overarching element: mana (spiritual energy). Spirituality continues to be a source of empowerment that transcends and connects the three essential ingredients: people, a’o, and honua. These three components are inextricably intertwined and are the foundational elements in Hawaiian extant knowledge.

# Summary

The goal of the *Aloha Framework* is to enhance and strengthen research, evaluation, and assessment to authentically and holistically reflect the values and life experiences of the Hawaiian people and to advance their wellbeing. In reflecting on the *‘Imi Na‘auao* studies, Manulani Meyer observed “...we get closer to our shared purpose when aloha is the primary source of our praxis.” (2019, p. 22)

By centering the practice of evaluation around the value of Aloha, evaluation can be transformed to:

- Honor ea: the kuleana (responsibility and privilege) of a people to make sovereign decisions and to perpetuate and live in ways that reflect their worldview and way of life.
- Fulfill evaluators’ kuleana to intended beneficiaries and their communities to promote their wellbeing and social justice;
- Advance the perpetuation of Native Hawaiian culture and ways of being and knowing (‘ike Hawai‘i, ‘ike nohona); and
- Ensure all major stakeholders have access to high-quality, valid, and actionable findings on which to base their decision making.

The *Aloha Framework*, emerged from our context and is grounded in the experiences of the authors and reflective of the advice of many who have been given the kuleana to conduct evaluation and research in predominantly Native Hawaiian contexts. We acknowledge and honor our kūpuna and others who shared their mana, wisdom, and place-based knowledge to guide this work.

We humbly offer the *Aloha Framework* to you, our audience, with the hope that it will advance the use of culturally-responsive and sustaining evaluation in Hawai‘i. To those working in non-Hawaiian contexts, we offer these ideas as seeds for reflection, to use those that may flourish in your environment.

**Aloha has no single, simple translation, but one was offered in 1917 by Queen Lili‘uokalani after the overthrow of the Hawaiian monarchy:**

“I could not turn back the time for the political change, but there is still time to save our heritage. You must remember never to cease to act because you fear you may fail. The way to lose any earthly kingdom is to be inflexible, intolerant, and prejudicial. Another way is to be too flexible, tolerant of too many wrongs, and without judgment at all. It is a razor’s edge. It is the width of a blade of pili grass. To gain the kingdom of heaven is to hear what is not said, to see what cannot be seen, and to know the unknowable—that is Aloha. All things in this world are two: in heaven there is but One.”

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## Appendix: The Naupaka Story

In the genealogical chant *Ka Inoa o Kualii'i*, Wākea, sky father, dwelt with Kananamukumamao, and born was the naupaka. Famous are the tales of their daughter, Naupaka and her suitor Kau'i. Whether recalled as hula students at the famous Ke'ei heiau on Kaua'i, or princess and commoner locked in forbidden love, their wistful, passionate romance aligns with a universal archetype of star-crossed lovers. In Hawai'i, this archetype and mo'olelo is interpreted as a flower torn and forever separated, one half growing kahakai (by the sea) and the other in the kuahiwi (upland) areas of Hawai'i nei (W.D. Beamer, 1984).

Matching the universality of the archetype, naupaka can indeed also be found in its many variations around the world, especially across the Indo-Pacific, and the Caribbean where it can be invasive. Its scientific name, *Scaevola*, means awkward or left-handed, referring to a perceived lopsided appearance of the blossom and a legendary hero who saved Rome from conquest by burning his right hand and intimidating the intruding king. Unraveling the Hawaiian story—and evolving beyond the perceived bias of half of an “awkward” whole—the lovers' tale and physical form provides a rich remedy when applied to evaluation practice. We share three lessons the naupaka teaches us to help orient ourselves in an Aloha-based evaluation process.

## THE CYCLE OF HEALING, PROTECTION, AND RESTORATION

Physically and medicinally, naupaka is known to have protective qualities, and is a seashore friend. The fruit or bark of naupaka kahakai can be mixed with salt and used to heal wounds or skin diseases. Applied sap from crushed, succulent naupaka leaves prevents diving goggles from fogging, maintaining clear vision. Being one of the first plants to grow on exposed beaches, naupaka's rooting branches control sand erosion and restore shoreline. It is also used in natural sunscreen, another protecting element.

Likewise, a grounded evaluation practitioner and process can help to protect or rehabilitate the essential features, functions, and characteristics of a community. As practitioners enter, one must seek a community's gifts, and strive to understand how their own gifts can support community restoration. One must seek self-awareness of their own perceptions and actions that can cause harm. Often, in presenting findings that are of value to the community, they may aid in clearing the fog to witness a more accurate story from the community's perspective. And if presented with care, findings may help heal and restore the integrity of our communities; because when stories are shared in safe and appropriate ways, they invite others to engage, relate, empathize, and strategize constructive pathways forward.

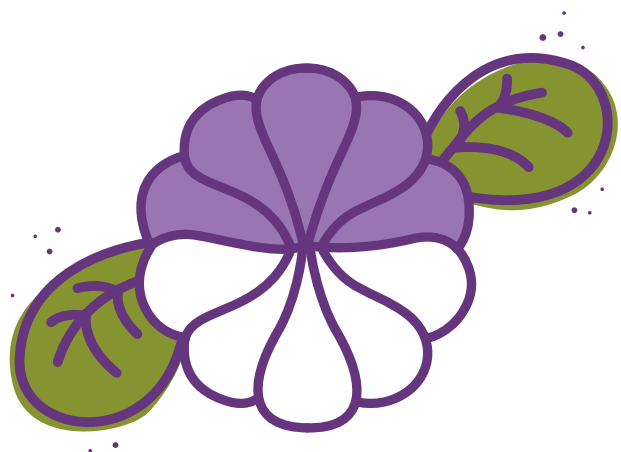
With Naupaka and Kau'i's separation as an example, the half flower reminds us to first understand the fragmentation and trauma that communities continue to navigate and sometimes struggle to integrate as they move towards resilience. How can we set ourselves up to see clearly, and measure more than what appears broken? How can we position ourselves in the evaluation process to ensure protection of the communities we engage with? How do we ensure that we see the beauty and strength in what may appear to be deficient? Where does healing and restoration fit in your evaluation process? Are you in the right space in your own healing process to be able to fruitfully engage in this work? It also reminds us that fragmentation and trauma mobilizes natural healing systems.

## NAUPAKA & ALOHA

Aloha is so often misinterpreted and misappropriated today. Beyond banal platitudes, the true meaning is often diminished as a simple and pleasant greeting. However, to truly perpetuate Aloha, action and advocacy is vital. Aloha, when necessary, can be fiercely loving, it is strong, it is an active verb. To activate an ethic of Aloha, one must recognize that justice and ea, self-determination or sovereignty, is also necessary. The Aloha and commitment that Naupaka and Kau'i demonstrated through their love and sacrifice becomes a lesson for us all. They acted to protect their love, and suffered the consequences; in the end, the justice meted by their gods preserved their love forever. Can we similarly commit?

Multiple varieties of naupaka have adapted to natural phenomena and changing environments over time, evolving to preserve their existence. However, their existence is endangered. It has become difficult to find naupaka kuahiwi today. If naupaka kuahiwi disappears, what will be forever lost? With the physical loss of these plants in their natural environments the traditional knowledge and relationships are lost as well—not just for naupaka but for all of us. We believe this can be healed through the activation of Aloha, to advocate for not just the existence, but the interconnected wellbeing and humanity of kākou, all beings seen and unseen, not just us “two-leggeds.” (Burgess, 2017)

Finally, the last gift of naupaka that we would like to offer is in her name. Sometimes she is referred to at Huahekili, “thunder fruit,” or hail. Like the hail of prolific naupaka kahakai berries upon the shore, today's generation of evaluation practitioners can seed and protect a new practice and approach in evaluation. Let it rain!



# Hawaiian Glossary

**Āina** – generally translated as land, has a broader meaning as “that which feeds”

**Ahonui** – patience: waiting for the ripe moment – to persevere

**Ahupua’a** – traditional land division

**Akahai** – kindness: to act and to speak with kindness

**A’o** – to teach or to learn, an exchange of knowledge or skills

**‘Auamo Kuleana** – to respectfully fulfill the responsibilities stemming from one’s position and/or talents

**Ea** – sovereignty (personal or political), also life, air, breath

**Ha’aha’a** – modesty, humility, openness

**Hana Hilina’i** – to work together in trust

**Hō’ike** – to demonstrate acquired knowledge or skills

**Honua** – land, earth, world; also foundation, fundamental

**Ho’okahua** – lay a foundation

**Ho’opono** – to behave in a way that is moral, fitting, proper, righteous

**Hui** – group, partnership or gathering

**‘Ike** – knowledge

**‘Ike Hawai’i** – traditional Hawaiian knowledge

**‘Ike Na’auao** – wisdom

**‘Ike Nohona** – knowledge of Hawaiian worldview and lifestyle

**Kahakai** – beach, seashore

**Kahua** – foundation

**Kaiāulu** – community

**Kākou** – a group of three or more, also to work together

**Kia’i** – protective guardians, stewards

**Kanaka / Kānaka** – person/people

**Kapu** – sacred or forbidden

**Kilo** – the intentional practice of close, systematic observation, an expert

**Koko** – blood (often refers to Hawaiian ancestry)

**Kuahiwi** – mountain or high hill

**Kupuna/Kūpuna** – elder/elders

**Kuleana** – responsibilities and commitment privileges

**Lāhui** – nation

**Lōkahi** – unity: to bring about harmony, in spite of differences

**Mā’awe Pono** – righteous pathway

**Makua/Mākua** – parent/parents

**Mana** – spiritual energy

**Mehameha** – loneliness, solitude

**Mo’olelo** – stories or legends, often told in the form of metaphor

**Naupaka** – a flower indigenous to Hawai’i with five petals in a semi-circular configuration

**‘O wai kou inoa** (literally: what is your name; a request to understand someone’s genealogy and background in order to identify and ground the relationship in existing connections)

**‘Ohana** – family (usually extended, often includes references to members with close affiliation who are not related by blood)

**‘Ōiwi** – native, bones

**‘Olu’olu** – pleasantness (internal peacefulness)

**‘Ōpio** – youth

**Pili** – entwined

**Pilina** – relationship

**Pilina Ho’ohana** – working relationship

**Pu’uhonua** – place of refuge or safety

**Wahi Pana** – legendary place



Aloha is the intelligence with which we meet life.

OLANA KA IPO AI  
*Kumu Hula*

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