Transformative Mixed Methods Training for the Next Generation of Researchers and Evaluators in Southern Countries

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ABSTRACT
Training mixed methods researchers and evaluators is a challenging task that is complicated even more when this occurs in the context of southern countries. In this article, we examine the literature regarding teaching mixed methods in terms of strategies and content. We begin with a critical reflection on how extant literature informs the teaching of mixed methods in southern countries. In such settings, the importance of framing mixed methods as a strategy for addressing social inequities and human rights is enhanced. We present a case study based on mixed methods training in Chile as a model for preparing the next generation of mixed methods researchers and evaluators through the use of transformative mixed methods adapted to that specific context. The training was made possible by a complex web of partnerships that shared similar goals.

KEYWORDS
Mixed methods; training; transformative

Training mixed methods researchers require more than sprinkling mixed methods approaches into research and evaluation courses that focus on quantitative or qualitative methods, especially when the training occurs in southern countries with challenging political contexts. It requires a concerted effort to organize and present content about mixed methods in a systematic way that links mixed methods approaches to the local context. University-based teachers of mixed methods disagree about the best way to teach mixed methods, with some arguing that separate quantitative and qualitative courses are not appropriate and advocating for approaches that integrate mixed methods into all methods courses (Christ, 2010; Onwuegbuzie, Leech, Murtonen, & Tähtinen, 2010). However, the structure of research coursework in many university settings prohibits this integrated approach. For example, many academic programs provide separate quantitative and qualitative courses, thereby allowing mixed methods topics to be taught on a foundation of knowledge and experience with quantitative and qualitative methods. Others note that specific disciplines have a tradition of emphasizing either quantitative or qualitative method, increasing the challenge for integrating mixed methods approaches into the curriculum (Mertens et al., 2016a, 2016b). In developing countries, access to quantitative, qualitative, and mixed methods courses is even more limited, suggesting that a different model is needed for preparing the next generation of researchers and evaluators in such settings.

The feasibility of preparing the next generation of mixed methods researchers and evaluators in developing countries must be considered in light of the university structures and policies that are present in those countries. Rather than depending on a university-based program of training, consideration should also be given to a model of professional development that occurs in alternative contexts, such as through professional associations and partnerships (Mertens et al., 2016a, 2016b). This can include the development of partnerships between countries and organizations and capitalize on networks and conferences that are part of the mixed methods researchers’ and evaluators’ professional lives.

Based on the limited literature that is available on teaching mixed methods, some common elements for mixed methods coursework emerge, such as inclusion of a discussion of paradigms or mental models (Greene, 2007), a typology of designs, purposes for conducting mixed methods studies, writing research questions, analyzing data, addressing validity/trustworthiness, and writing up the results (Mertens et al., 2016a, 2016b). Bazeley
(2003) and Hesse-Biber (2015) explicitly address the need to teach strategies for the integration of quantitative and qualitative aspects of methods, data, and findings, an issue that deserves more attention, as this is identified as a defining characteristic of mixed methods studies that are challenging for many researchers and evaluators (Bryman, 2007; Maxwell, Chmiel, & Rogers, 2015).

The inclusion of paradigms as an organizing frame for mixed methods teaching is not without controversy. Bergman (2008), Biesta (2010), and Maxwell (2011) argue that paradigms are not unified positions, but rather could be viewed as having heuristic benefit to understand better the phenomenon that is studied. Mertens (2010, 2015) advocates for the inclusion of the concept of paradigms in teaching mixed methods based on the argument that students benefit from making their philosophical assumptions of axiology, ontology, and epistemology explicit as a way to understand better their beliefs that influence their methodological decisions. She identifies four paradigmatic frameworks that are present in the mixed methods literature, namely, post-positivism, constructivism, transformative, and pragmatic, along with dialectical pluralism (Greene, 2007; Johnson, 2017), a meta-paradigm. The transformative paradigm has particular relevance in developing countries because it is based on the belief that researchers and evaluators have a responsibility to contribute to the improvement of human rights and the furtherance of social justice (Mertens, 2015, 2017; Mertens & Wilson, 2012).

In developing countries, injustice and inequality manifest themselves in many ways, including extreme poverty; lack of access to healthcare, education, housing, jobs, and food; environmental pollution; and exploitation of groups based on indigeneity, gender, race/ethnicity, language, disability, deafness, religion, sexual orientation, and immigration or refugee status. The use of a transformative mixed methods approach provides an opportunity to include both quantitative and qualitative data to enhance understandings of the complexity of these problems and to develop and evaluate potential solutions to the problems. In addition to the current injustice and inequality, many developing countries are ruled by autocratic dictators or are suffering from the legacy of living under such a leader. These difficult political contexts have resulted in an older generation that is fearful of a public challenge to injustice and inequities. Training the next generation of researchers and evaluators is the crack in the door providing an opening and hope for a better future.

Training in Southern Countries: The Situation in Latin American Countries

Training in mixed methods in southern countries needs to be conducted with a framework that incorporates contextual factors, including high levels of poverty and inequities based on gender and geographic location. According to the Economic Commission for Latin America and the Caribbean (ECLAC),

Latin America had a poverty rate of 28.2% and an indigence rate of 11.8% of the whole population in 2014, a continuation of the previous year’s levels. The number of poor grew in 2014 to 168 million, of whom 70 million were indigent. The increase occurred basically among the non-indigent poor, whose numbers rose from 96 million in 2013 to 98 million in 2014. (ECLAC, 2015, p. 9; see Figure 1)

Between 2010 and 2014, most countries in the region reduced their levels of inequality in income distribution; however, the gaps remain large, and inequality continues to manifest itself in many dimensions beyond income. For example,

“earnings also reflect disparities in other dimensions of the world of work, including geographical areas of residence and the race or ethnicity of working people. Average earnings are higher in urban areas (US$ 470 a month in 2013) than in rural ones (US$ 192), and there are marked differences by race and ethnicity. The intersection of ethnicity and race with gender creates a pattern of inequality in which indigenous women are in the lowest positions on the income scale, even after controlling for education. Among those with 8 years of education or more, the top of the income scale is occupied by non-indigenous, non-Afro-descendent men, followed by Afro-descendent men, then non-indigenous, non-Afro-descendent women, Afro-descendent women, indigenous men and, lastly, indigenous women.” (ECLAC, 2015, p. 36; see Figure 2)

Inequalities are also evidenced in the gap in income between men and women, especially women in rural areas. In 2013, women in all income quintiles had lower incomes than did men. The worst situation was in the poorest quintile of the rural areas, where women had an income equivalent to 64% of that received by men in 2013 (ECLAC, 2015, p. 33).
Figure 1. Income inequality and indigence in Chile 1990-2015.

Figure 2. Earnings by sex, race/ethnicity, and years of education in Latin America around 2013.

Source: Economic Commission for Latin America and the Caribbean (ECLAC), on the basis of special tabulations of household surveys conducted in the respective countries.

* Indigenous population and other population: Brazil, Chile, Ecuador, Mexico, Panama, Paraguay, Peru, Plurinational State of Bolivia and Uruguay. Afro-descendant population: Brazil, Ecuador, Peru, Plurinational State of Bolivia and Uruguay.
The reality of these inequities brings with it implications for public policies that also need to be incorporated into mixed methods training in Latin American countries. The transformative approach to mixed methods provides a framework for researchers and evaluators to consider policies regarding their effect on sustaining an unequal status quo or potential to move the country forward to greater equality. Training in transformative mixed methods brings questions to the fore, such as:

- How are government policies protecting social spending in the face of the low dynamism of the economy, protecting employment and wages, strengthening the institutional framework for social development with social protection, and allowing for citizen participation and transparency?
- How can social research, and especially evaluative research, give due account of the multidimensional conditions of the reality in which people live, and the changes that are generated from the public or private interventions?
- How can mixed methods studies be designed to support the reduction of inequality?

In the next section, we consider the implications for training in mixed methods in developing countries through a review of the methodological approaches present in social and evaluative research in the region.

**Problems in the Production of Knowledge in the Region**

Teaching mixed methods in the region is challenged by the two predominant logical methods that are taught in the region’s universities of how to approach the development of knowledge. These comprise inductive methods, generally associated with qualitative research, and deductive methods, generally associated with quantitative research. The contrast between these two approaches is provided in an article by Fernández (1999), in which he explores the development of knowledge regarding techniques in primary care research. He points out that:

> Qualitative research focuses on understanding the person as a whole (linked to a social context), understanding and giving meaning to the world of relationship interaction of people, their motivations, expectations, fantasies, among others. It is in this field, that is, when the researcher wants to obtain answers about the meaning of some of these aspects, where the qualitative paradigm acquires its full force. On the contrary, if it comes to knowing frequencies and distribution of facts, for example, patients who die from lung cancer, it is the quantitative paradigm that gives the answer. (Fernández cited in De Pelekais, 2000, p. 350)

In most social research departments in the region’s universities, separate quantitative and qualitative courses are taught with no integration of methodologies, topics that are more and more being addressed in the scholarly discourse in the field of mixed methods in the North. Latin universities’ progress regarding teaching methodology has not been in the form of mixed methods courses; rather, it appears as offering more specialty courses in both methods and electives that allow a deeper understanding of the individual quantitative or qualitative approaches (e.g., the University of Chile, University of Santiago de Chile).

Yet, there is a beginning of scholarly discourse in the Latin American literature about mixed methods that can be integrated into training in this region. For example, Roberto Hernández Sampieri, proposes the following definition:

> Mixed methods represent a set of systematic, empirical and critical research processes and involve the collection and analysis of quantitative data and qualitative data, as well as their integration and joint discussion, to make inferences as the product of all information collected (meta-inferences) and to achieve a better understanding of the phenomenon under study. (Sampieri, 2010, p. 546)

Sampieri (2010, p. 550) supports the use of mixed methods because it allows researchers and evaluators to tackle more complex phenomena and problems, address these problems from interdisciplinary perspectives, and achieve a broader and deeper perspective of the phenomenon (more comprehensive and holistic). The remainder of this article describes an example of training in transformative mixed methods that occurred in Chile in 2016 as an example of a culturally and politically responsive framework for teaching the next generation of mixed methods researchers and evaluators.

**The Chilean Case: Transformative Mixed Methods Training Course**

The training of mixed methods researchers and evaluators in Chile came about through a complex web of partnerships that were focused on improving equality in southern countries throughout the world. Such partnerships are important to support training in mixed methods in this part of the world because of the low level of resources
that are available through the university systems there. Therefore, it is relevant that the United Nations declared 2015 as the International Year of Evaluation in response to efforts made by EvalPartners to raise the visibility of evaluation globally. EvalPartners, a global movement co-led by the International Organization for Cooperation in Evaluation and UN Women, provides support for enhancing Voluntary Organizations for Professional Evaluation (VOPEs) around the globe. EvalPartners’s fundamental values include gender-responsive and equity-focused evaluations; these values align with the University of Santiago’s and the Chilean Evaluation Network’s desire to support social justice and human rights through the use of transformative approaches to evaluation. The momentum provided by the International Year of Evaluation supported the need for strengthening enabling environments for evaluation at the levels of government, civil society, VOPEs, and individual evaluators. Representatives of the University of Santiago and the Chilean Evaluation Network (Peroni and Olavarria) contacted Professor Mertens to determine her interest in working in Chile to increase the capacity of emerging researchers and evaluators to work at these different levels to conduct rigorous, mixed methods evaluations that can be used to address the complex problems experienced in such countries as Chile.

The process of building the partnership began when the University of Santiago applied to the Fulbright Commission to have a scholar come to their country to address their needs for strengthening approaches to evaluation of policies and programs with a focus on social justice and equity. The purpose of the Fulbright Specialist Program is to generate linkages between U.S. scholars and professionals and their counterparts at host institutions overseas. According to their website, “The program awards grants to U.S. faculty and professionals approved to join the Specialist Roster in select disciplines to engage in short-term collaborative projects at eligible institutions in over 140 countries worldwide” (Council for International Exchange of Scholars [CIES], n.d., para. 4).

Mertens applied for and was granted a Fulbright Specialist award to become a visiting professor at the University of Santiago of Chile that began in September 2016. The team of Mertens, Olavarria, and Peroni searched for additional partners that would support the training of the next generation of transformative mixed methods researchers and evaluators. They contacted the American Evaluation Association (AEA), which had a new program entitled the International Partnership Program (IPP). According the AEA website, the IPP offers an innovative approach to strengthen individual VOPEs’ capabilities by taking advantage of and maximizing capacities and experiences within the global community of VOPEs. The program encourages VOPEs to form partnerships with AEA to help each other to strengthen their capacities. (AEA, n.d., para. 2)

The IPP requires a partnership between regional or local VOPEs. Therefore, a partnership was forged between the Chilean Evaluators Network and the Washington Evaluators, a local affiliate of the AEA. This partnership provided funds to support professionals from Mexico and Colombia to join the training team, as well as to support simultaneous translation during the formal training.

This project was developed by the Chilean Evaluators Network, EvalChile—a Chilean Voluntary Organization for Professional Evaluators or VOPE—in partnership with the University of Santiago3 and Mertens, supported by the Fulbright Commission. The Eval Youth Latin America and the Caribbean (LAC) Initiative and the Latin American and the Caribbean Network for Systematization, Monitoring, and Evaluation (RELAC) also contributed to reaching the goals of this project, especially in the call for application and dissemination processes. The Fulbright Commission and the University of Santiago sponsored the entire project, and the AEA, through its international program, covered most of the logistic items of the training course (translation, materials, and tutor travel expenses). The contributions of all the partners allowed participants to attend every activity of the project free of monetary charges.

The mentioned partnerships took place in the planning and implementation of the project and had great relevance for the project success. A key factor was the leading role that the Chilean Evaluators Network had in the project, with the University of Santiago especially, in determining the need for training. The partnership with the other evaluation professional organizations was also very strategic; the main reason is that there is no evaluation degree program in any of the Chilean academic offerings; therefore, an alternative way to train the next generation of mixed methods evaluators was needed. The web of networks and partnerships provided a strategic way forward. This was valid in Chile and would also be relevant in the other Latin American countries in which dissemination of the project took place. This type of partnership is not usual in the frame of the Fulbright Specialist program, due to its academic nature, nor is it common in mixed methods training programs that are university-based in other parts of the world. However, in the case of the evaluation field, because of the mentioned distance between the training and the practice and the university, it was an appropriate strategy.

Thus, the partnership took shape with support from the Fulbright Commission and the AEA in conjunction with the University of Santiago and the Chilean Evaluation Network. The aim of the project was to strengthen the
evaluation field in Chile by promoting the use of mixed methods evaluations with a transformative approach. This purpose included: generating capacities among evaluators to conduct and develop mixed methods evaluations (individual capacities), developing institutional capacities to strengthen the work of the Chilean Evaluators Network, and enabling the environment for the demand and implementation of better evaluation.

The mentioned purposes are aligned with the strategic goals proposed by the Global Evaluation Agenda 2016-2020 for strengthening evaluations worldwide (Eval Partners, 2016). Evaluators who work in international development are influenced by the Sustainable Development Goals that outline strategies to achieve the goal of strengthening evaluation through integrating ways to address issues of equity and justice in diverse contexts worldwide. The transformative framework promotes the use of mixed methods to address complexity in evaluation and research through training evaluators and raising awareness among other key actors like evaluation funders, the academy, professional networks, and other organizations and government agencies. Thus, the stage was set for conducting transformative mixed methods as a culturally and contextually responsive strategy for evaluators in Latin America. The next section explores the philosophical assumptions of the transformative paradigm within this context.

**Transformative Mixed Methods and its Appropriateness in Southern Countries**

The transformative paradigm emerged in response to voices from marginalized communities that research and evaluation were not appropriately inclusive and the results did not accurately represent them, nor did they lead to an improvement of their living conditions (Cram & Mertens, 2015). The transformative paradigm is made up of four philosophical assumptions that were first identified by Guba and Lincoln (1994) to describe beliefs that guided researchers and evaluators in their decision making: axiological (the nature of ethics), ontological (the nature of reality), epistemological (the nature of knowledge), and methodological (the nature of systematic inquiry). Mertens (2015) and Mertens and Wilson (2012) used these four types of assumptions to describe a philosophical framework that was quintessentially rooted in the concerns of members of marginalized communities—namely, the transformative paradigm.

The axiological assumption demonstrates high relevancy for conditions in Chile and in other southern countries that are suffering from a current or past oppressive government because it involves defining the nature of ethics for researchers and evaluators regarding their ethical obligation to address issues of social justice and human rights. In order to design studies that meet this ethical standard, researchers and evaluators need to be able to identify those dimensions of diversity that were used as a basis for discrimination and oppression. It also requires that researchers and evaluators are aware of the complexity of cultural groups in that specific context and identify strategies for working with respect and insurance of safety for all stakeholders involved.

The use of transformative mixed methods is one way to come to a better understanding of the cultural complexity and contextual variables that are relevant in the country in which the study will occur. For example, the examination of historical documents allows for an understanding of how the country has come to be in its current condition. The use of statistical data, such as that presented earlier in this article, provides information about the extent to which members of marginalized communities are suffering from inequalities in the society.

Ontologically, proponents of transformative mixed methods hold that there are different versions of reality that emerge from different social positionalities and that a researcher’s or evaluator’s responsibility is to make visible those versions of reality that sustain oppression and those that contribute to positive transformative change. For example, Zea, Agular-Pardo, Betancourt, Reisen, and Gonzales (2014) used mixed methods to uncover various versions of reality about the risk of HIV/AIDS in Colombia for internally displaced men who are gay or bisexual and transwomen. These researchers found that the dominant discourse put forth a version of reality that characterized this population as subjects of victimization and blamed them for contracting the disease. Through the application of transformative mixed methods strategies, the researchers were able to give voice and visibility to the participants and reveal the strengths within these communities and the degree of discrimination and violence that they experienced. This enriched version of reality was used to inform policy changes designed to give this population safer spaces and services to stay healthy.

Epistemologically, the transformative paradigm calls upon researchers and evaluators to be aware of the power relationships existing in the context and identify strategies for inclusion of stakeholders and methods that provide opportunities for legitimate participation. Wilson and Winiarczyk (2014) applied this principle in their evaluation of Suenaletras, a software tool developed by the Centro de Desarrollo de Tecnologías de Inclusión of Escuela de Psicología de la Pontificia Universidad Católica de Chile (CEDETI) to support and improve deaf children’s literacy in South America. The program was developed for use in Chile, and the evaluation was being conducted to test its transferability to Argentina. They used a sequential transformative mixed methods design
that included time for building relationships with the creators of the program, deaf adults and children, teachers of deaf students, and hearing parents with deaf children. Stakeholders were contacted prior to Winiarczyk’s travel to Chile and Argentina to pilot test interview and survey questions. She hired interpreters in Argentina who were proficient in Argentinean sign language, American Sign Language, and Spanish. She also hired Chilean sign interpreters who were similarly proficient. However, they were proficient in Chilean sign language. In both cases, the interpreters were identified by members of the deaf community as people they trusted to be accurate. Through the application of the transformative epistemological assumption that recognizes power differences and appropriate strategies for accurate communication, they were able to uncover numerical improvements in literacy, and the qualitative data revealed the improvement of relationships between parents and their deaf children.

Methodologically, the transformative assumption is based on the logical progression from the axiological, ontological, and epistemological assumptions. Although mixed methods are not absolutely required for a transformative study, their use enables researchers and evaluators to be responsive to the complexity and contextual variables necessary to increase the potential to contribute to positive social transformation. The researchers and evaluators who worked to support the training in mixed methods in Chile chose this approach because it aligned with their assumptions about what was needed in their particular context.

**Transformative Mixed Methods Training Course**

To select the participants for the course, the Chilean Evaluators Network team made an open call for participants offering the possibility to participate in the course with no fee for any of the selected participants. This call was published in the VOPE web page, on the university web page, sent via email to the VOPE database of people interested in evaluation, and disseminated using the Facebook and Twitter platforms. The response to this call was very high, receiving 111 applications from 14 different countries: Chile, Argentina, Peru, Bolivia, Paraguay, Ecuador, Brazil, Colombia, Costa Rica, Guatemala, El Salvador, Honduras, Dominican Republic, and México.

The high number of applications showed that there is a lack of access to training in mixed methods and transformative evaluation in the Latin American Region even though the demand was revealed to be very high. The Latin American context, especially the high levels of poverty, segregation, inequalities and the presence of many marginalized groups, added to the diverse political contexts, increasing the value of this type of training for researchers and evaluators who want to contribute to transformation and social change.

The participants selected for the course were 35 evaluators who came from Chile, Argentina, Peru, México, and Paraguay. The course was well balanced regarding gender, with 55% women and 45% men. The average age was 39 years old, and one-third of the total were 35 years old or younger. Most of the participants were evaluators or professionals who solicit evaluations, mostly from Civil Society Organizations and public institutions. One participant came from an organization for marginalized groups. Due to limited resources for the logistics of the training course, only 35 participants were selected.

Before implementing the training program, Mertens met with Olavarría and Peroni to discuss the contribution that mixed methods and transformative evaluation can make to evidence-based decision making, and how it can contribute to social transformation. This was followed by a meeting with the Chilean Evaluators Network leaders. In this meeting, Mertens guided the Chilean Evaluators Network board in diverse strategies for strengthening its functioning based on the experience of the AEA and highlighted the duty that this organization has with advocating for the use of diverse approaches to evaluation, with a special focus on transformative mixed methods evaluation.

The Mixed Methods and Transformative Evaluation International Training Course was a 32-hour course for Latin American Evaluators that focused on the use of mixed methods for transformative evaluation. This strategy was chosen because in the Chilean evaluation field, most evaluation studies are demanded by the public sector with inflexible terms of reference. The transformative approach supports a needed change to strengthen the use of mixed methods in a manner that is inclusive of all relevant stakeholders, including the evaluation clients, the Academy, Civil Society Organizations, policy makers, government officials, and members of marginalized communities.

The aim of the Mixed Methods and Transformative Evaluation Training Course was to generate individual capacities among evaluators from Chile and other Latin American countries—with a special focus on young and emerging evaluators—for designing, implementing, and using mixed methods evaluations with a transformative approach in diverse contexts. The workshop participants represented professionals who implement projects with marginalized populations, representatives of social organizations or civil society who advocate for the rights
of marginalized groups, and people interested in the field of evaluation focused on transformation and social justice.

Mertens was the senior expert in mixed methods who taught the course; the team also included a coordinator and three tutors who helped her during the group work. One tutor came from the Chilean Evaluation Network, one tutor was a gender-focused evaluation expert from Colombia, and the third tutor was a young and emerging Mexican evaluator representing the Eval Youth initiative. The sponsorship from AEA gave the feasibility to invite the two international tutors. Mertens’s command of Spanish was at an intermediate level; the tutors were all native Spanish speakers. The tutors’ role was to allow a better understanding of the particularities and challenges of the diverse Latin American contexts for the participants’ learning process.

The training in transformative mixed methods evaluation course was implemented over four days. During the morning of these days, the course had a simultaneous translation to ensure that no language barrier impeded the learning process. The training course was organized to be both theoretical and practical. The theoretical part took place during the morning of the four training days, during which time the instructor explained the conceptual framework combined with examples of mixed methods and transformative research undertaken in diverse communities worldwide. The use of these examples and a constant reference to the participants’ experience in each subject facilitated the learning process and the appropriation of the concepts reviewed. Small group discussions and large group sharing were also included as part of the morning sessions in order to insure that the participants’ questions were answered and to check on their processing of the information.

During the afternoons, the participants worked in groups using a practical case that came from their professional activities or areas of interest. They had access to the instructor and tutors during these sessions to ask questions and obtain feedback on their responses to the activity. They divided themselves into groups of approximately five participants based on their shared interests. They were given a specific task each day relating to the learning objectives and concepts reviewed. Every day, the same group moved forward in the design of a mixed methods evaluation project.

The content of the course was developed by Mertens in consultation with the Chilean colleagues. In addition, an introductory session was taught by one of the tutors who aimed to review the specificity of the Latin American context and the challenges that this context raises for mixed methods evaluation with a transformative lens.

The main content taught by Professor Mertens during the training course were:

- **Module 1: Introduction to the transformative paradigm and its philosophical assumptions**
  In this initial theoretical module, paradigms were discussed, with a special emphasis on the transformative paradigm and the philosophical assumptions that sustain it were examined as a first step to understanding the methodological implications. During the afternoon—in the practical module—the participants were divided into groups based on their working experience and interest. The groups worked on the following projects:

  - **Gender:** This group discussed and inquired about inequities based on gender, and the many Latin American marginalized women and LGBT (Lesbian, Gay, Bisexual, and Transgender) groups that suffer diverse types of violence. They put a specific focus on a Chilean gender-based violence program that intervenes with aggressors.
  - **Children’s rights:** This group worked with policies and programs for children, and especially those for children who are part of marginalized populations living in conditions of poverty, segregation, without a responsible adult, among others, which impede their attainment of their rights entitlement. The transformative focus that they gave was the children rights entitlement, and they discussed diverse ways to include their views in mixed methods transformative research in the frame of the Convention on the Rights of the Child. This issue has great relevance in Chile today because the rights of children have become an important issue in the public agenda due to several weaknesses detected in the National Childhood Protection System.
  - **Indigenous Groups:** This is a very important issue in Latin America due to the many indigenous communities that inhabit these territories. In this scenario, the research and evaluation that includes the voices of the indigenous communities for social transformation is a key challenge to strengthen this field. This group’s work focused on a case of an indigenous group in Peru that took part in an improvement program for access to health services, inquiring in the diverse mixed methods methodological challenges to work in this case.
  - **Education:** This group worked with diverse educational issues focusing on the diverse mixed methods participatory methodologies that are useful to work with young people in educative contexts. There was a very fruitful discussion about the convergences that the mixed methods research with a transformative approach had with the use and production of innovative participatory methodologies for inquiry that are used in popular education.
  - **Older adults:** This group worked with older adults with a special focus on their caregivers and the role they play in their well-being. The main challenge was searching for effective ways to include the views of the
elderly and the views of their caregivers in a transformative mixed methods study that will allow the improvement of their situation and allow progress to be made towards social justice. This particular issue is very important in Latin America and especially in Chile because of the increasing elderly population.\textsuperscript{5}

- Cultural services: This group worked with the cultural services that the governmental institutions provide to citizens in the Chilean territory. They worked with a particular program that aims to increase the access to cultural goods and services to inhabitants of diverse communes, especially the geographically isolated zones. In countries like Chile, with a very diverse territory, there are many isolated communities that require access to the public cultural services; this is an important part of democratization and, therefore, implementing mixed methods transformative research in this context is crucial.

- Module 2: Critical review of the understanding culture and context about the nature of the problem and developing culturally sensitive solutions

During the second module, strategies for developing evaluation questions that consider the views of the marginalized communities in the identification of the problems and development of solutions were discussed. It also included discussion of the need to contribute with a critical view and a political commitment to social change from evaluation teams.

During the afternoon, in the practical module, participants worked on identifying mixed methods approaches that would support the identification of the social problems and raise appropriate evaluation questions for the diverse contexts.

- Module 3: Methodological design: Mixed methods in a transformative cyclic design

In this third module, the combination of quantitative and qualitative methods in a transformative cyclic design was explored. This methodological design was presented as a way to increase inclusion and the presence of diverse voices, as well as informing the decision-making through the evaluation process.

During the afternoon the participants worked with each team developing a mixed methods design for each of the projects.

- Module 4: Transformative evaluation use and advocacy strategies

In this last module, strategies for the use of mixed methods to increase the use of evaluation for the strengthening of human rights and to promote social justice considering the total range of key actors involved in the evaluation process were presented. This includes the integration of the findings of the quantitative and qualitative data collection for an informed decision making during and after the evaluation process is finished.

During the practical module of this session, participants designed and discussed strategies to ensure the use of the mixed methods evaluation approaches for social transformation.

As a conclusion, each group presented their work and received feedback from the teacher, the tutor team, and the other participants. Finally, each participant of the course received a Certificate of Participation in the training course.

**Evaluation of the Training Course**

The evaluation process of the project had the following four steps:

- Participatory evaluation dialogue: During the closing session of the training course, the Chilean Evaluators Network team led an evaluation dialogue with all the participants asking them about their experiences in the course, the positive aspects, and also ideas for improvement that they could suggest. This space had high participation, and most of the comments focused on thanking Professor Mertens and the organizing team for the opportunity to attend the course.

- Online Satisfaction Survey: After the course had been completed, an online satisfaction survey was sent to all the participants. This questionnaire had five main dimensions: Individual identification, institutional identification, training course experience, and evaluation of the training course. A total of 22 participants responded to the questionnaire, and the main results are shown in the following section.

- Evaluation interview with Professor Mertens: This interview was directed by a member of the Chilean evaluators network and the aim was to identify the main impressions of the mixed methods expert who led the project regarding its design, processes, and main results; and strategies to continue to strengthen the knowledge acquired; and the evaluation practices of the participants were reviewed and opportunities to strengthen the partnerships built for this project.

- The final step of the evaluation was an evaluation meeting of the Chilean Evaluators Network in which the team reviewed every activity that took place in the frame of the project, its processes, and results. In this meeting, strategies to strengthen the built partnerships were deeply discussed and new project ideas emerged.
The results of the evaluation revealed that the participants positively evaluated their learning experiences in the training course. Out of the 22 satisfaction surveys received, the course obtained a 6.4 average rating on a scale between 1 and 7.

The main reason the participants applied for the course was that it addressed ethical principles such as inclusion, social justice, change vision, and the need to bring a mixed methods approach and methodology to their evaluation practice or institutions. During the participatory evaluation dialogue, the need to address transformative issues in the evaluation practice was frequently mentioned. In addition, participants stated that the most valuable subject that motivated them to want to participate in the course was the importance of transparency for the evaluators’ role to contribute to social justice through their works.

An important finding of the satisfaction evaluation process refers to the following challenges that could be addressed via the use of a transformative mixed methods approach in the Latin American region:

- Increase the importance of the evaluation process into the public policy cycle and incorporate users as an active part of this process;
- Guide the technical or economists’ vision of evaluation towards a social transformation vision;
- Recognize the ethical and political character of the evaluation and see the value of evaluation in their work; and
- Advocate to contribute to an evidence-based decision making from a human rights approach.

The main contributions that the participants recognize that the training course made to their evaluation practice are:

- Learning a holistic approach to evaluation;
- The use of mixed methods as a strong tool to approach evaluation in diverse contexts;
- The improvement of strategies to incorporate users in an active manner into the evaluation process;
- The epistemological change of the transformative approach, wherein philosophical, theoretical, methodological, and ethical consistency make it a powerful tool to move forward towards transformation and social justice.

The participants of the course mentioned spaces for improvement of the learning process. These were mainly related to extending the length of the course, especially the practical part, and changing the examples and practical cases. To this end, participants suggested that one example case should be previously elaborated for the practical group work and that this example should be a very detailed Latin American case. This could illustrate all the contextual factors involved in the case, and it could be reviewed by the participants before the class. The addition of this type of exercise would allow a better use of the time for developing the group proposals.

Finally, the participants mentioned some of the challenges that evaluators face in their countries, using diverse mixed methods approaches for evaluation, innovating methodology, using more participatory approaches, enabling the environment for using diverse mixed methods approaches, and strengthening the evaluators’ networks. These challenges support the hypothesis that the utilization of training models like the one illustrated in this case represents a powerful opportunity to address training to meet unmet needs in southern countries with a strong and leading participation of the local VOPEs and with a committed participation of international experts.

Expanding Training Opportunities in Context

Because of the lack of training opportunities for researchers and evaluators, the activities for training in transformative mixed methods were expanded beyond the 32-hour course previously described. The transformative evaluation training course was a part of an integrated dissemination project that included many activities. Examples include:

- Universidad Central in the Social Work School: Professor Mertens attended a meeting with decision makers regarding policy planning and evaluation. The purpose of this meeting was to discuss the contribution that mixed methods and transformative evaluation can make to evidence-based decision making, and how it can contribute to social transformation. This session was planned as an advocacy strategy for promoting the use of diverse approaches for evaluating programs and policies—especially the mixed methods transformative approach.
- The University of Santiago in Chile (USACH): The "Inclúyete" Collective is made up of several USACH units, including the Foundation for Graduates and Friends, the Sign Language Course, the Council for Corporate Social Development, and the Inclusive Access, Equity and Permanence Program. They sponsored an expert panel on "International Experiences of Inclusion of Persons with Disabilities in Higher Education." Professor Mertens presented on the inclusion of deaf persons in higher education, and the usefulness of mixed methods approaches to research to support the inclusion of persons with disabilities and persons who are Deaf at USACH.
• Ministry of Education: Professor Mertens met with the Director of Inclusion Programs in the Chilean Ministry of Education and his staff to discuss the role that transformative mixed methods research could play in the formulation and implementation of policies designed to support persons with disabilities and those who are Deaf in higher education.

• Postgraduate student Master Class in the Catholic University of Chile: In this Masterclass, the visiting professor discussed with the participants the importance of the use of mixed methods strategies to approach evaluation from a transformative paradigm. To achieve this, the ontology, axiology, and epistemology of the transformative paradigm were reviewed, and some methodological examples were raised to illustrate its potential.

• Undergraduate students’ Master Class in the University Alberto Hurtado. During this class, the visiting professor discussed with the participants the importance of the evaluation as a professional career, showing the potential of transformative mixed methods for contributing to transformation and social justice.

Conclusion: Lessons Learned from the Chilean Case

Training researchers and evaluators in countries with a legacy of political oppression and high rates of poverty is a challenging proposition. The demand for such training, especially using approaches that address issues of human rights and social justice, is high and availability of such training is scarce. The model for training in research in the evaluation that was applied in Chile provides the opportunity to extract lessons learned about working in similar contexts.

Importantly, the request for training in transformative mixed methods came from the Chilean research and evaluation community because they saw the relevance of such an approach to address issues of importance to them in their specific context. The development of the training was a collaborative affair with continuous consultation between the expert trainer (Professor Mertens) and members of the Chilean community. Thus, the training was adapted to the specific interests of the Chilean stakeholders, and the application cases to further their skill development came from their work.

A second critical component of the model was addressing the scarcity of resources to support training in mixed methods through development of partnerships. In this case, a Fulbright award provided the majority of the financial support with additional support coming from the AEA’s International Partnership Program. However, financial support was not the only element of importance in the partnership process. As noted in this article, numerous universities, professional associations, and government agencies were included as a means of widening the impact of the opportunities to learn about mixed methods. The contexts in which the dissemination of training occurred was also diverse, including social work, public policy, the inclusion of persons with disabilities and people who are Deaf, and child welfare. The audiences included practicing professionals, university teachers and administrators, graduate students, and undergraduate students. This demonstrates the importance of being able to adapt the mixed methods training to the appropriate level for the audience.

Finally, this model demonstrates the need for additional mixed methods training that takes into account the cultural context of the country in which the research and evaluation will be conducted. Cultural issues include the culture of academia as well as the multiculturalism found in each country’s populations. When the culture of academia supports the use of one methodology over another, then this represents a challenge to the mixed methods community regarding advocacy for more than one methodology. Training in advocacy strategies is a potential area for the mixed methods community to consider for the future. Culture in countries is not monolithic and homogeneous. As demonstrated by the information about the sources of inequities in Chile, mixed methods researchers and evaluators need to be cognizant of the diversity within countries. A further area in need of attention is the development of mixed methods approaches that consider diversity and the influence of power differences in order to design mixed methods studies that have greater potential to impact public policies and service provision in developing countries.

Notes

1. ECLAC considers a measure of extreme poverty (indigence) and total poverty based on the cost of acquiring the basic baskets specific to each country, instead of the “$1 per day” line. “Extreme poverty” or “indigence” is understood as the situation where resources are not available to meet at least basic food needs. In other words, “extremely poor” refers to persons residing in households whose income is not sufficient to purchase a basic food basket. In turn, “total poverty” is understood as the situation where the income is lower than the value of a basic basket of goods and services, both food and non-food. In contrast, the basic baskets that give rise to the lines used by ECLAC are country-specific and respect the consumption patterns prevailing in them. Given that the indigence lines developed by ECLAC represent the cost of acquiring a basic food basket, its value has a clear link with national realities and allows a more intuitive interpretation of
its results. In particular, it should be noted that ECLAC’s measurements are based on poverty standards of the region, which are higher than those of the world’s poorest countries. As a result, World Bank figures tend to be smaller. Source: CEPAL, 2010.

2. www.evaluacionpoliticaspublicas.com

3. www.usach.cl

4. To facilitate the data analysis and the selection process, the VOPE team used an online survey application to send every application that was available during three weeks. After the deadline, the selection process began and it was conducted by a task group from the Chilean VOPE. The criteria for the selection were:
   - Academic background
   - Work experience in evaluation
   - Experience working for marginalized populations
   - Impact possibilities described in a project proposal
   - Special consideration was given to members of the VOPE, young and emerging evaluators and representatives of marginalized groups organizations.

5. Life expectancy rate in Chile for year 2015 was 80.5 years (World Health Organization, 2016).

References


