Tracing the Transnational Influence of Jennifer Greene's Ideas: Research on Evaluation Theory Across Countries

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Background: The empirical study of evaluation theories has not been a strong focus of recent research on evaluation (RoE) efforts. Nevertheless, evaluation scholars should investigate how evaluation-related ideas are exchanged across the world in this increasingly globalizing field.

Purpose: The study examines the transnational influence of American evaluation theorist Jennifer Greene's ideas. Simultaneously, this RoE study details a distinct methodological strategy for conducting research on evaluation theory.

Setting: Not applicable.

Intervention: Not applicable.

Research Design: Mixed-methods citation analysis—comprising both quantitative and qualitative strategies—is used to investigate how Greene's program evaluation Theories have impacted the field across countries. The study pursues a contextualized, rich understanding of the contexts in which Greene's ideas are used to observe the imprint of her work on evaluators theorizing and practicing outside of the United States.

Data Collection and Analysis: Citation counts for five Greene publications were analyzed across three databases. The analysis included a) to what extent countries or regions were represented, b) trends in represented countries, and c) how citations changed over time. The qualitative analysis entailed review of full-text publications of international citations to understand how Greene's concepts were engaged and shaped evaluation outside the United States.

Findings: Evaluators across the world noted Greene's ideas with 42 countries represented in the citations of her five publications. The study's qualitative analysis revealed the significance of Greene's enduring argument regarding the necessity of engaging values in evaluators' practice.

Keywords: mixed-methods citation analysis; evaluation theory; transnational influence; research on evaluation; values

Introduction

Theory holds a special place in the field of evaluation's discourse and identity (e.g., Alkin, 2013; Christie, 2003; Shadish, 1998).[1] Recognized as one of four major aspects of evaluation along with *method*, *practice*, and *profession* (Smith & Brandon, 2008), evaluation *theory* provides the intellectual footing for practice. Over decades, evaluation theory has catalogued key ideas about evaluation's purpose and meaning that have enlivened conversations between evaluators, scholars, and program constituents. Shadish (1998) notably declared that evaluation theory constitutes the core of the profession's identity—it "reveals who we really are" and is what fundamentally distinguishes us from other fields of practice and disciplines (p. 1). The origins and features of the field's theories have been the topic of many significant publications (e.g., Alkin, 2013; Cram et al., 2018; Chilisa et al., 2016; Chilisa & Mertens, 2021; Hood, 1998, 2001; Hood et al., 2015; LaFrance, 2004; LaFrance & Nichols, 2010; Mertens & Wilson, 2019; Shadish et al., 1991; Thomas & Campbell, 2021).[2]

However, the empirical study of evaluation theories has not been a strong focus of research on evaluation (RoE) efforts in the past few decades (King, 2003; Vallin et al., 2015). Moving forward, research on evaluation can seek to better investigate how evaluation-related ideas are exchanged across the world in this increasingly globalizing field. A robust research agenda for tracing the circulation of such ideas is an important contribution to illuminating multidirectional, cross-cultural influences on evaluation theory. Our study is a modest step forward in supporting this goal for expanding RoE's contribution to understanding cross-cultural exchanges about evaluation concepts.

This study examines the influence of American evaluation theorist Jennifer Greene across countries. Through mixed-methods citation analysis, we trace engagement with her ideas on equity, democracy, and values engagement in program evaluation. Our interest in this endeavor developed from a recent study in which we explored the transnational influences and friendships that have shaped Greene's work over the years—specifically, her understanding and practice of evaluation (Goodnight & Avent, 2023). The initial study we conducted seemed incomplete: absent was any examination of how Greene's work had concurrently influenced evaluators outside of the United States. We wished to know more about transnational exchanges related to her concepts of equity, democracy, and values engagement.

In this article, we examine the influence of Greene's concepts across countries. Our study is guided by three questions: (1) What countries or regions outside of the United States are represented in citations of Greene's work?, (2) What concepts in Greene's writing are discussed in publications citing her work?, and (3) How are authors engaging her concepts? Rather than thinking about researcher influence in the strictly quantitative way often employed in determining researcher impact (e.g., h-indexes), we sought a contextualized, richer understanding of the places from which evaluators were engaging with Greene's ideas. We wanted to investigate how evaluators applied her ideas in their contexts and for what purposes. To achieve this depth of knowledge required our use of both quantitative and qualitative strategies, as well as our attention to issues of geographical or cultural location and translation.

Greene's Concepts

At the center of this study is Greene's expansive body of theory in program evaluation. Determining how to characterize her abundant writing on issues of diversity, democracy, equity, participation, and values in evaluation is challenging. Throughout her writing, a strength of Greene's theorizing is her presentation of these issues as highly interconnected and omnipresent in evaluation. In this study, we chose specific Greene publications

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[1] Our use of the term "theory" is general and refers to a range of conceptual writings on evaluation that are not unitary in their conceptualization of evaluation or their articulation of how it should be practiced. In this way we are referring to diverse theories written on the topic of evaluation. For this treatment of the term "theory" in evaluation, see Shadish (1998).

[2] These publications have become increasingly diverse in their perspectives on the roots of evaluation and what evaluation ideas guide—or should guide—practice in different evaluation contexts. Evaluation contexts are defined by not only country or geography but also

communities' cultural, linguistic, racial, and other identities and shared experiences (e.g., colonization). The specifics and arguments of these different evaluation theories are vital to the field's identity but beyond the scope of this article. Nonetheless, it is crucial to note that the growing diversity in evaluation theories is interconnected to meaningful conversation in the field about prolonged issues including (a) the exclusivity in how evaluation theory has been identified and (b) the harm in how theories have been applied inappropriately to particular contexts and communities.

for the citation analysis (see Table 1 in the following section), which made it easier to identify three broad and overlapping areas of her work in program evaluation theory: equity, democracy, and values engagement. Although there have been small changes in Greene's terminology over the years, we found that she has remained consistent in the issues that she engages and her stances on these issues (Goodnight & Avent, 2023).

The Greene publications we analyzed for this study highlighted how equity, democracy, and values are intertwined in evaluation practice. Regarding equity, Greene highlights the importance of valuing the inclusion, participation, and voices of marginalized or underrepresented people in evaluation practice (e.g., Mathie & Greene, 1997). As importantly, she provides guidance (often through case examples) on how to implement these values in the ongoing work evaluators do. In her writing on democratic evaluation, Greene discusses the nature of evaluation and how evaluation should be conducted. Evaluation is indisputably political and is related to the exercise of power (e.g., Greene, 1997; Mathie & Greene, 1997): evaluation can illuminate power issues within programs and organizations, facilitate decision-making toward the redistribution of resources and power within programs, and create space for less-powerful individuals to identify and voice their interests in a program (Greene et al., 2004). Alternatively, undemocratic evaluations can proceed from the interests of the most powerful and narrowly produce information that reinforces those interests. Greene (1997) writes about the necessity of open, ongoing dialogue or democratic deliberation across a diversity of people to represent the plurality of interests and views related to a program. This focus on *democratic pluralism* is essentially an emphasis on equity, as she notes that the individuals most likely to be excluded from an evaluation are those with the least power (Greene, 1997). Finally, Greene's commitment to strengthening equity and democracy through evaluation is manifested in an overarching principle guiding her evaluation practice: values engagement (e.g., Greene et al., 2006; Greene, 2012). Greene argues that evaluation inevitably advocates certain values and deprioritizes others in its design and process. Accordingly, it is important that evaluators be transparent about the values that motivate and shape their evaluation practice. Moreover, values are socially and culturally positioned, so the cultural competence of the evaluator matters, as does the evaluator's dedication to humility, critical reflection, respectful communication, and the inclusion of diverse perspectives in the evaluation (Greene, 2015a).

Methods

The evaluation field's research demonstrates growing interest in citation analysis methodology (Greenseid & Lawrence, 2011; Heberger et al., 2010; Roseland et al., 2011). Our study is the first to use citation analysis to investigate transnational influences of evaluation theory on evaluators' ideas and practice. Citation analysis is the building and application of indicators to assess influence, impact, or quality of scholarship originating from citation data (Moed, 2005). In conducting citation analysis, researchers utilize databases to search for scholarly information and bibliometric indicators. Traditionally, citation analysis is a quantitatively driven endeavor in which indicators such as citation counts direct researchers' analysis (Nehaus & Daniel, 2008).

We have organized our methods and process of investigation under the three questions that inform our study. As stated above, these questions required both quantitative and qualitative strategies to examine the nature of Greene's imprint on others' published work. Our method is distinct in its extension of common literature review and citation analysis strategies with the goal of more substantively investigating the meaning of a source's usage in other publications. We sought to determine which of the original source's components were markedly influential, and how so. Greene (2007; 2015b) has advocated for mixing methods in social inquiry to study a phenomenon holistically from a diversity of perspectives; we found that mixing methods was useful in conducting this research because a synthesis of qualitative and quantitative data facilitated examination of Greene's transnational influence from multiple angles, contributing to a fuller sense of her work's impact.

As a starting point for the study, we selected five of Greene's publications to serve as a foundation for our investigation. The publications are listed in Table 1. After conducting searches in three databases (Google Scholar, Scopus, and Web of Science) to identify her indexed writings published before January 2020 ($n = 110$), [3] we

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[3] We identified 110 publications (books, book chapters, and articles) written by Greene between 1975 and 2019 by cross-referencing publications indexed by Web of

Science, Scopus, and Google Scholar with Greene's profile in the Illinois Experts database (https://experts.illinois.edu/).

focused our attention on those discussing program evaluation theory. We selected Greene's 1997 article "Evaluation as Advocacy" for our pilot analysis because we determined it was her most cited publication (see Appendix A). The article, published in the *American Journal of Evaluation* (formerly known as *Evaluation Practice*), also sets into motion one of Greene's seminal contributions to the field's theory—the concept of values engagement. In addition, we selected four other Greene publications for this study because of their explicit global and transnational qualities. Central to our study's purpose in examining transnational

and cross-cultural exchange, we found these articles and chapters revealed glimpses of how social programs, communities, and evaluators beyond the United States and the Global North perspective of mainstream evaluation enriched Greene's vision of evaluation's relationship to "making the world a better place" (2013, p. 208). The inclusion of these internationally oriented publications (one of them co-authored with Alison Mathie) helped us better anchor our own interest in the multidirectional nature of evaluation influence.

Table 1. Greene's Publications Included in our Transnational Citation Analysis

	Publication year	Publication type	Reference
1	1997	Article	Greene, J. C. (1997). Evaluation as advocacy. *American Journal of Evaluation*, *18*(1), 25–35.
2	1997	Article	Mathie, A., & Greene, J. C. (1997). Stakeholder participation in evaluation: How important is diversity? *Evaluation and Program Planning*, *20*(3), 279–285.
3	2012	Report chapter	Greene, J. C. (2012). Values-engaged evaluation. In M. Sergone (Ed.), *Evaluation for equitable development results* (pp. 192–207). UNICEF.
4	2015	Book chapter	Greene, J. C. (2015) Culture and evaluation: From a transcultural Belvedere. In S. Hood, R. Hopson, & H. Frierson (Eds.), *Continuing the journey to reposition culture and cultural context in evaluation theory and practice* (pp. 91–107). Information Age Publishing.
5	2016	Book chapter	Greene, J. C. (2016) Advancing equity: Cultivating an evaluation habit. In S. Donaldson & R. Picciotto (Eds.), *Evaluation for an equitable society* (pp. 49–66). Information Age Publishing.

Research Question 1: What countries or regions outside of the United States are represented in citations of Greene's work?

We approached answering the first research question quantitatively through an analysis of citation counts for each Greene publication across the three databases. As part of our investigation, we identified the countries or regions represented in the citations of Greene's work. We also examined (a) to what extent countries are represented (number of citations); (b) trends in represented countries, such as belonging to specific regions; and (c) how citations of Greene's publications have changed over time.

   We began with "Evaluation as Advocacy" (1997), which is indexed by all three databases, as a test article. While the article does not directly engage transnational or global issues, it lays the foundation for what Greene discusses in several

later publications, such as her "Advancing Equity" chapter (2016). We conducted searches in each database for "Evaluation as Advocacy" and entered citation counts in a spreadsheet (e.g., Greene source, date, database, how many citations). Next, we categorized the citing publications as either "domestic" or "international." A publication qualified as "international" if it was (1) written by an internationally affiliated author, or (2) written about an evaluation context outside of the United States or a region outside of North America, or with an explicit global focus. If the citing publication did not meet these criteria, it remained in our domestic category within the citation count. If the citing publication did meet a criterion for international, we downloaded the full-text PDF of the citing publication and saved it for further analysis. For all publications citing "Evaluation as Advocacy" that were categorized as international, we recorded the following information in a spreadsheet: full citation, database, authors, publication type,

country or region, year, and abstract. We repeated the same process for each Greene publication listed in Table 1. We then aggregated the results and analyzed the citation counts according to database, country designation, and citation year.

Research Question 2: What concepts in Greene's writing are discussed in publications citing her work?

To answer our second research question, we pivoted to a qualitative inquiry approach. This qualitative phase built upon the quantitative analysis from Research Question 1. The qualitative investigation enabled us to identify the concepts in Greene's publications that the sources citing her work were engaging. Our qualitative analysis for Research Question 2 took part in two phases.

In Phase I, for each international citation for which we could access a full-text version of the source (121 of 145 sources), we analyzed the publication to (a) determine where Greene's publication was cited in the text and (b) assign a level of priority for deeper analysis. The priority levels were based on the extent to which Greene's publication was cited and her ideas appeared to be utilized in the citing publication:

- *High*: Citation of several Greene sources or one Greene source several times, with moderately substantive treatment of her idea(s)
- *Medium*: Citation of several Greene sources or one Greene source several times, with less substantive treatment of her idea(s)
- *Low*: Citation of one Greene source one to two times, with superficial or vague treatment of her idea(s)

We categorized each citing publication as high, medium, or low priority and kept brief notes detailing each decision.

For Phase II, all citing publications that received a high prioritization ($n = 43$) were reviewed. For "Values-Engaged Evaluation" (2012), "Culture and Evaluation" (2015a), and "Advancing Equity" (2016), citing publications that received a medium prioritization ($n = 4$) were also reviewed, because these Greene sources had comparatively few citations in total due to their more recent publication date and their publication type (i.e., chapters in books and a report). We analyzed these high- and medium-priority publications with an interest in determining what concepts were engaged and how they were used—and, potentially,

how they were translated to serve new evaluation contexts.

Research Question 3: How are the authors engaging Greene's concepts?

To answer Research Question 3, we extended our qualitative analysis to a third phase, which illuminated how the authors were utilizing Greene's ideas in their own evaluation theorizing and practice. For Phase III, utilizing our analyses, completed in Phase II, of the 47 citing publications, we selected a small set of cases that that best represented a substantive understanding of Greene's concepts. We were also interested in observing the cases' geographical spread and breadth of disciplinary connections and publication venues, and the range of Greene's ideas that they used. We selected seven publications according to these criteria.

A key decision in our content analysis of citing publications was to consistently use Greene's own terminology to describe the concepts engaged by the authors who cited her. This is significant for two reasons: (1) authors sometimes used varying or new terms to describe Greene's ideas, and (2) Greene's terminology shifted in small ways across her publications (Goodnight & Avent, 2023). We wanted to preserve understanding of how Greene herself labeled ideas within the publications being cited. So, for example, we mirrored the slight evolutions in her discussions of values from "Evaluation as Advocacy" (1997) to "Values-Engaged Evaluation" (2012): from values advocacy (i.e., "advocating certain values") to values engagement (i.e., "engaging values") and values prescription (i.e., "prescribing certain values").

Results and Discussion

Research Question 1: What contexts outside of the United States are represented in citations of Greene's work?

We answered Research Question 1 through analysis and categorization of publications included in the citation counts for each of the five Greene sources listed in Table 1. We present the results in three ways: (1) international versus domestic citations, (2) citations by country or region, and (3) citations over time and by database.

International–Domestic Comparison. Figure 1 depicts the number of international and domestic

citations for each Greene publication, aggregated across databases. This graph provides a comparative understanding of Greene's domestic and transnational reach through her publications. Of the five publications, "Evaluation as Advocacy" (1997) has the greatest difference between domestic and international citations, with 131 more domestic citations. Interestingly, international citations outpace domestic ones for "Stakeholder Participation" (1997), published in the same year, although with less difference. Possible explanations for these results include (a) "Evaluation as Advocacy" has received comparatively strong domestic attention because it introduces Greene's

most enduring argument about the centrality of values in evaluation (i.e., values advocacy), and (b) it does not discuss evaluation outside the U.S. context. By comparison, "Stakeholder Participation" is Greene's oldest publication with an international focus; it is also co-authored with Mathie, who has worked across several country contexts, making it difficult to decipher the role of co-authorship in citation results. For the remainder of Greene's works, which were all published between 2012 and 2016, there are more domestic citations than international, but the discrepancy between the two is not large.

Figure 1. Greene Publications Highlighting Total Domestic versus International Citations for all Databases
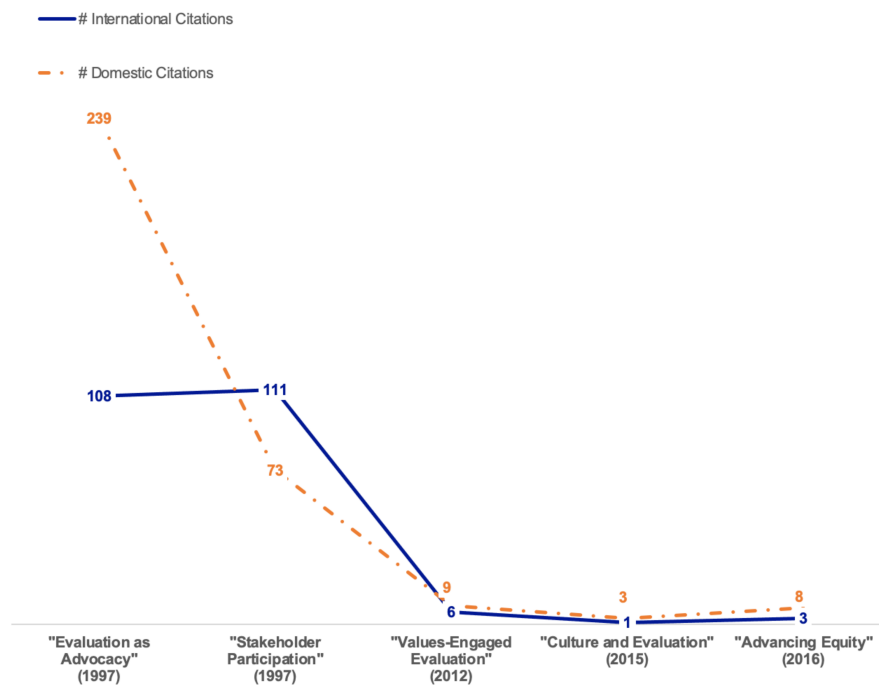
Country Contexts. The spectrum graph, Figure 2, displays each country represented in the international citations for Greene's five publications: there are 42 countries total in addition to a few regional and global contexts (a few international publications citing Greene's work focused at regional or global levels rather than on specific countries). Each ring depicts a specific publication by Greene. The numbers in the respective squares indicate how many times that country was referenced by the publications citing Greene's text. For instance, publications citing

Mathie and Greene's "Stakeholder Participation" referenced Australia 16 times and Nigeria 2 times. Countries in the Global North are overrepresented in the international citations for Greene's publications, as indicated by number of European, Western, and high-income countries. Nonetheless, "Evaluation as Advocacy" and "Stakeholder Participation" are cited by authors across a diversity of regions and countries in the majority world: Central and Latin America (e.g., Costa Rica and Brazil), Africa (e.g., South Africa, Somaliland), and Asia and the Pacific (e.g., Nepal and

Indonesia). These results signal the global reach of Greene's work. A couple of other observations from Figure 2 are noteworthy. First, a large number of international citations for "Evaluation as Advocacy" were associated with one country—the United Kingdom. Second, the most heavily represented countries are places, not surprisingly, where English is the dominant national language (e.g., Canada, United Kingdom, and Australia) and

evaluation is significantly institutionalized. This suggests that language plays a role in accessing and employing literature on evaluation theory, and it further indicates that incentives to engage with the field's theory and publish on evaluation issues may be skewed toward contexts where evaluation is well established in the activities of governments and civil society.

Figure 2. Country Contexts Represented in Citations of Greene's Publications
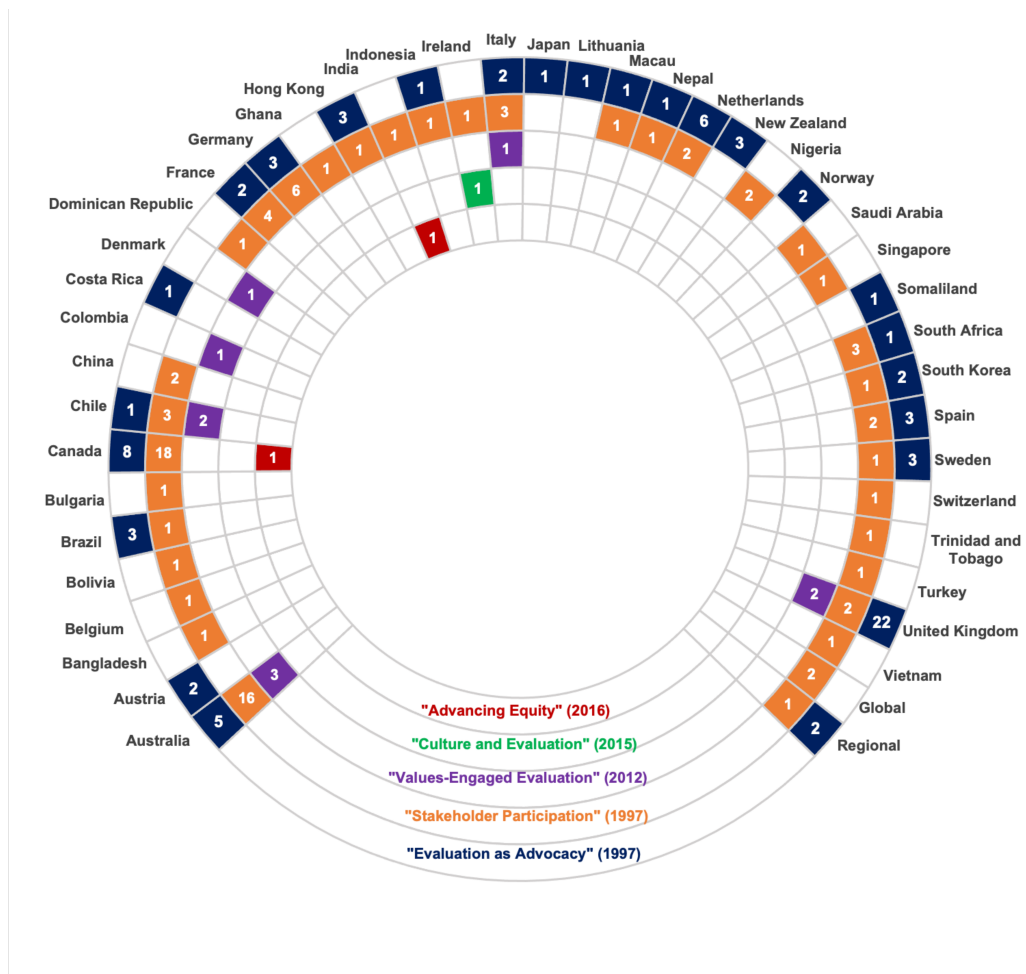
Citations Over Time and By Database. The age of Greene's publications is an important factor in studying their influence through citation. "Evaluation as Advocacy" and "Stakeholder Participation" are the most helpful of Greene's publications for observing the passage of time's significance in judging the transnational influence of her work. Figure 3 offers a snapshot—containing two line graphs that depict the general trends in international citation by database for these two early publications of Greene's. For "Evaluation as

Advocacy," citations for all three databases follow a similar trend. For "Stakeholder Participation," there is a significant jump in international citations between 1997 and 2010 according to Google Scholar's database—a jump that is not reflected in Scopus and Web of Science. Main findings that can be observed in these graphs are (1) Web of Science indexes fewer of the documents and publications that cite both Greene articles, as compared with Scopus and Google Scholar; (2) international

citations for "Evaluation as Advocacy" significantly increased from 2005 onwards according to every database; and (3) international citations for "Stakeholder Participation" between 1995 and 2008 are substantially underrepresented in databases other than Google Scholar. Figure 3 demonstrates sustained, if not growing, international interest in Greene's work, which parallels our observations of strong, ongoing interest in her ideas within the field of evaluation domestically. At present, we can only wonder about the future trends for the more recent publications included in this study (listed in Table 1).

Figure 3. Chronology of International Citations by Database for Two Greene Publications
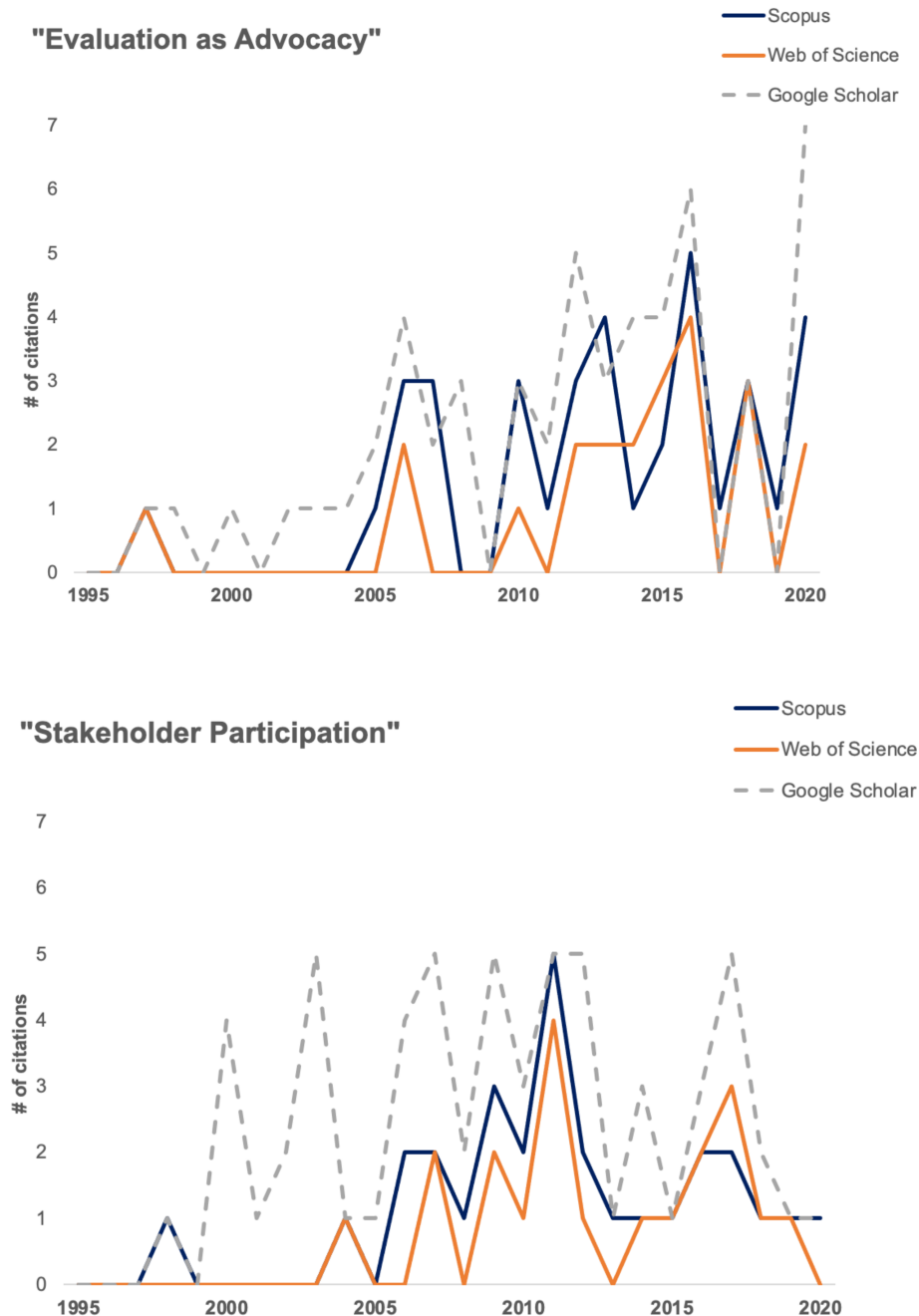
Research Question 2: What concepts in Greene's writing are discussed in publications citing her work?

To answer Research Question 2, we identify which of Greene's concepts are discussed in the citing publications. Table 2 summarizes our findings and indicates the breadth of concepts authors drew upon in the citations we categorized as international. Authors tended to cite Greene to explore the same kinds of issues, regardless of which of Greene's five publications they were referring to. For example, authors citing Mathie & Greene's "Stakeholder Participation" ($n = 17$) were exploring the issues of dialogue and the participation of marginalized or underrepresented stakeholders similarly to authors citing Greene's "Values-Engaged Evaluation" ($n = 7$). The exception to this overlap in themes discussed by citing authors is for Greene's "Culture and Evaluation," but only a single in-text citation comprised our content analysis related to that chapter (due to its recent publication and low number of citations). "Culture and Evaluation" was also published in an edited book on culture and culturally responsive evaluation specifically, so the chapter's focus was distinct from that of Greene's other work. Figure 4 presents a synthesis of the similar concepts (listed in Table 2) cited across Greene's four other publications to illustrate the conceptual overlap in ideas being discussed by citing authors.

Table 2. Greene's Concepts Discussed in Citing Publications

Greene publication	Number of citations analyzed[4]	Greene concepts discussed in citing publications[5]
Greene (1997) "Evaluation as Advocacy"	20	Democratic deliberation, democratic pluralism, democratic values, politics in evaluation, values advocacy
Mathie & Greene (1997) "Stakeholder Participation"	17	Dialogue, diversity of participation, equity, participation of marginalized or underrepresented stakeholders, power, pluralism, voice
Greene (2012) "Values-Engaged Evaluation"	7	Dialogue, inclusion, participation of marginalized or underrepresented stakeholders, politics in evaluation, representing plurality of stakeholder interests and views, values engagement, values prescription
Greene (2015a) "Culture and Evaluation"	1	Critical reflection, culturally responsive evaluation practice
Greene (2016) "Advancing Equity"	2	Equity, inclusion, participation of marginalized or underrepresented stakeholders

[4] These citing publications were analyzed because they received high- or medium-level priority in Phase II of our qualitative analysis.

[5] The terms used to describe the concepts in this table are aligned to the language used in Greene's original publication being cited. Some variation in terms exists across Greene's original publications.

Figure 4. Conceptual Overlap in Concepts being Cited Across Greene's Publications

Research Question 3: How are the authors engaging Greene's concepts?

To answer Research Question 3, we analyzed seven citing publications from those included in Table 2; the selected publications represented the deepest engagements with Greene's ideas. For this analysis, the three publications citing Greene's "Culture and Evaluation" or "Advancing Equity" were eliminated based on their relative depth. Appendix B presents a summary of Greene's concepts and their uses within six publications citing Greene's "Evaluation as Advocacy," "Stakeholder Participation," or "Values-Engaged Evaluation." Most authors discussed Greene's theorizing on the centrality of values in evaluation and her insistence that evaluators should openly acknowledge values during the evaluation process. Authors explored many dimensions of Greene's argument about values: (a) how values shape the focus of inquiry, (b) how values dictate the usefulness and credibility of evaluation findings, and (c) how ignoring values in work with program constituents can harm the inclusiveness and fairness of the evaluation. The importance of advocating democratic values in evaluation closely related to other concepts authors discussed, such as democratic pluralism and ensuring all people's interests are represented in the evaluation, particularly through the participation of people typically marginalized or underrepresented in social programs.

We found one publication where the author offers great substance in connecting Greene's ideas in "Evaluation as Advocacy" with a context beyond the United States. In 2013, Cavino published an article titled "Across the Colonial Divide: Conversations about Evaluation in Indigenous Context," which examines evaluator roles when conducting evaluations with Indigenous people. The article also describes ways in which specific evaluation orientations oppose or aid colonial attacks on Indigenous sovereign spaces. Cavino highlights various evaluation approaches—including Greene's (1997) theory of evaluation as advocacy—that in practice draw attention to issues of cultural and colonial contexts. Among the practices Cavino highlights are making known an evaluation's purpose, understanding where power resides and who the evaluator is in relation to different stakeholders, and privileging community involvement. As the article continues, Cavino (2013) notes other scholars' critiques of Indigenous evaluation models, such as those expressing concerns about objectivity; Cavino utilizes Greene's work to remind readers of the scientific traditions that have dominated the field for judging a program's fairness or merit, and the challenges to such frameworks that drive the perspective of advocacy as "an inevitable part of evaluative inquiry" (p. 26). However, Cavino also expresses complexities in applying Greene's advocacy perspective to evaluation in the Maori context, suggesting that the concept of advocacy

assumes choices exist regarding which approaches are worthy of advocacy. More specifically, Cavino argues that competitiveness and an adversarial nature seem to underlie evaluations occurring in mainstream Western contexts that are different in Indigenous program contexts; Indigenous evaluation approaches prioritize collaboration, community, and collective good. Publishing the critique in an American journal, Cavino simultaneously appreciates Greene's theorizing of values advocacy and problematizes it for a Maori context, providing a rich example of how ideas forged out of democratic values in one place can be complex or inappropriate for serving the common good in another.

From the analyses for Research Question 2 and Research Question 3, we observed that the most detailed engagements with Greene's work were in dissertations (as measured by number of in-text citations and depth of consideration of her concepts). When those same studies were published in other venues, such as academic journals, these traces of engagement with Greene's work diminished (e.g., Emerson, 2020; Quiedeville, 2017). This indicates to us the effect of word- and page-count limits on the extent of citation and depth of explanation of theorists' ideas in published work. Dissertations are much lengthier and more detailed documents than book chapters and articles.

In conducting the final phase of qualitative analysis, we were particularly interested in acts of translation in which the citing authors reinterpreted Greene's concepts to fit their own evaluation contexts and needs. As we worked to select a group of exemplar publications to analyze the qualitative use of Greene's work, we found it hard to find examples of deep usage, let alone translation. Publications did not meet our criteria for deep usage if (1) the author included Greene's publication in a list of other citations following a discussion of a general principle, practice, or observation about evaluation (e.g., Goodnight, 2017); (2) the author cited only Greene but offered little detail about the substance of her idea(s) or how her publication was being used in the citing work; (3) the author cited Greene but analyzed her ideas through an intermediary author who was quoted in the analysis (e.g., interpreting Greene through Datta [1999] in Streatfield & Markless [2011]); (4) the author used Greene in a way that was vague or easy to misinterpret in relation to Greene's argument; (5) the citing publication was written in a language other than English (e.g., Pino, 2014); or (6) the author discussed Greene's ideas but did not apply them to a stated evaluation context and thus did not explicitly signal a translation of Greene's concept to a different place (e.g., Lemire et al., 2019). Without extending our qualitative analysis (beyond the publications themselves) to include direct interviews with authors, our ability to understand their translations of Greene's concepts was limited. Most authors were citing Greene in publications serving primary purposes beyond evaluation theorizing, and most did not provide detailed accounts of how they translated Greene's work for their own contexts. Judging the merit of these citing publications according to how well they served our study's purposes is pointedly not our intention. We surmise that most publication venues provide little space for exploring such cross-national and -cultural connections.

Limitations

We encountered limitations in conducting this study that are instructive for future RoE studies on related topics. In answering Research Question 3, we ultimately chose publications for extended qualitative analysis (according to our above-mentioned criteria) that were from high-income, culturally Western countries, with the addition of South Korea. We wondered, does this reveal something important about the engagement with evaluation theories broadly? Does this suggest the lesser significance of Greene's work for non-Western or Global South contexts? Our methodological approach enabled us to highlight clear trends and analyze the work of authors who *do* utilize Greene's ideas, but it was limited in its ability to provide conclusive reasons for these trends and why certain countries, regions, or types of contexts seemed to draw on Greene's ideas less substantively.

Likely contributors to the trends we observed include issues that generally relate to the limitations of databases and citation analysis, such as the English language bias of publishing and the underrepresentation of international journals and authors in database indexing (e.g., Meho & Yang, 2007; Nehaus & Daniel, 2008 Noruzi, 2005). Many of the countries represented in our international citation results are majority English-speaking. A complementary issue was our inability as researchers to analyze the small handful of texts our quantitative citation analysis unearthed that cited Greene's work and were not published in English (*n* = 10). A third (larger) issue is databases' inequitable inclusion of publication venues outside of high-income, Western countries in what is catalogued (Walters, 2016).

Our study contributes to a broader understanding of Greene's transnational influence and how to study such influence in research on evaluation. At the same time, we conclude that it also highlights current limitations of citation analysis methodology for investigating transnational influence in a holistic way, despite our expansion of its typical methods to include a qualitative phase (Goodnight et al., 2022). [6] To summarize, we identify three main limitations as (1) the finite space in formal publications to engage in theory explication and translation for new contexts, (2) the uneven institutionalization of evaluation and varying incentives of evaluators across the world to write about evaluation theories for publication, and (3) the English-language bias in publishing, as well as geographical and other biases in databases' indexing, which can distort understanding of the full breadth of the field's theories.

Conclusion

Older theories—addressing democracy, equity, social justice, and values in evaluation—may have durability and importance for contemporary evaluation contexts different from those for which the theories were originally conceptualized. However, the extent to which such theory translation is constructive for local evaluators needs greater analysis. The field of evaluation benefits from RoE scholars analyzing the ways old ideas are updated and translated (if they can be) to be pertinent for new evaluation practitioners and communities. As importantly, evaluators practicing in the United States benefit from (a) understanding the limitations of U.S.-centered evaluation ideas, and (b) learning about the diversity of theories developed in other countries to better serve their different evaluation contexts and communities. Research on evaluation can support empirical examination of how evaluation ideas are exchanged across countries and cultures to share and reconceptualize theories—or to formulate new ones. RoE can illuminate what effects these exchanges have on evaluation practice, methods, and the profession in different places. Our study was a modest pursuit of these broader interests through the case of tracing one evaluation theorist's ideas transnationally.

Jennifer Greene's ideas have influenced many American evaluators interested in issues of equity,

democracy, and values-engagement (Hall et al., 2023). The strong influence of her theories within the United States prompted us to explore the potential impact of her concepts among evaluators in other countries. Using a sample of five of Greene's publications, our mixed-methods citation analysis study yielded valuable information about the international reach of Greene's ideas and which of her concepts international authors were discussing most in their work. The quantitative findings of the study indicated her particular influence on evaluators in Western contexts such as Canada and the United Kingdom. However, evaluators practicing in places across the world cited her ideas, with 42 countries represented in the citations of her five publications. Meanwhile, the study's qualitative analysis revealed the significance of Greene's enduring argument—regarding the necessity of engaging values—for evaluators practicing in numerous geographical and cultural locations.

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[6] An article that details the affordances and limitations of mixed-methods citation analysis, especially for conducting research on evaluation theory, is

forthcoming. The article synthesizes our experience conducting this study with a literature review on citation analysis methodology and database indexing.

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Appendix A. International and Domestic Citation Counts for Greene's Publications, by Database

Greene source	Pub. year	Database	Total citations	International citations (%)	Domestic citations (%)
Evaluation as Advocacy	1997	Google Scholar	202	53 (26.2%)	149 (73.8%)
		Scopus	89	34 (38.2%)	55 (61.8%)
		Web of Science	56	21 (31.5%)	35 (62.5%)
Stakeholder Participation	1997	Google Scholar	116	61 (52.6%)	55 (47.4%)
		Scopus	40	30 (75.0%)	10 (25.0%)
		Web of Science	28	20 (71.4%)	8 (28.6%)
Values-Engaged Evaluations	2012	Google Scholar	17	9 (52.9%)	6 (35.3%)
		Scopus	NI	NI	NI
		Web of Science	NI	NI	NI
Culture and Evaluation	2015	Google Scholar	4	1 (25.0%)	3 (75.0%)
		Scopus	NI	NI	NI
		Web of Science	1	1 (100.0%)	0 (0.0%)
Advancing Equity	2016	Google Scholar	8	2 (25.0%)	6 (75.0%)
		Scopus	NI	NI	NI
		Web of Science	3	1 (33.3%)	2 (66.7%)

Note. "NI" indicates that the Greene publication was not indexed by the database.

Appendix B. How Six Citing Publications Engage Greene's Ideas

	Citing source	Greene source	Context	Concepts[7]
1	Blewden (2014)	Greene (1997)	New Zealand	Values advocacy

Example Quote: "a counter position frames advocacy as the appropriate absence of value neutrality (Greene, 1997). Advocacy is understood here as the presence of a particular set of beliefs and value commitments that underpin evaluation practice and which are communicated to stakeholders (Greene, 1997). A commitment to enhance the value and utility of evaluation to stakeholders, through the intentional pursuit of process use, seems appropriately described through this framing of advocacy within the context of evaluation practice." (p.12)

Description: The dissertation examines evaluators' intentionality and reasoning in facilitating stakeholder learning through engagement in an evaluation's process. The author cites Greene's position on the importance of identifying the values advocated through evaluation practice. The author emphasizes values advocacy as vital to the intentionality required to successfully and fairly facilitate an evaluation process, which is useful to stakeholders and substantively develops their learning about the evaluand.

	Citing source	Greene source	Context	Concepts
2	Kim & Cervero (2007)	Greene (1997)	South Korea	Politics in evaluation, power, values advocacy

Example Quote: "Greene (1997) points out that evaluation approaches are distinguished importantly by whose criteria and questions are addressed. Accordingly, understanding the politics of evaluation pertains to identifying whose interests affect establishing the criteria for evaluation." (p. 6)

Description: The article is particularly focused on power and diverse interests within human resource development settings, specifically a Korean insurance company's managerial program. The authors draw upon Greene's work to describe evaluation as political and values-laden; this excerpt quotes Greene to convey that whose perspective structures the evaluation matters. That perspective is a defining aspect of the inquiry's relationship to power (via values, evaluation questions, and criteria).

	Citing source	Greene source	Context	Concepts
3	Izurieta et al. (2011)	Mathie & Greene (1997)	Australia	Inclusion, power, participation of marginalized or underrepresented stakeholders, politics in evaluation, voice

Example Quote: "The willingness of stakeholders to participate in evaluation processes or express disagreements could be affected by fear of retaliation from those within the program who possess legal and/or institutional authority, especially when dealing with programs that are politically sensitive (Mathie and Greene 1997)." (p. 3)

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[7] The terminology used to describe Greene's concepts is aligned to Greene's language in the original publication being cited. Some variation in terms exists across Greene's original publications (e.g., "values advocacy" versus "values engagement") and the publications that cite her work.

	Citing source	Greene source	Context	Concepts[7]

Description: This article on the monitoring and evaluation of joint management practices of protected areas in Northern Australia with Indigenous communities focuses on the importance of diverse stakeholder participation in evaluation and its relationship to inclusion, authority, equity, and power issues. The authors link power and authority in the program to issues of equitable participation and voice in the evaluation—basically, less powerful stakeholders self-censor to avoid retaliation or harm in program benefits.

4	Quiedeville (2017)	Mathie & Greene (1997)	France; Bulgaria	Diversity of participation, pluralism, power

Example Quote: "We advocate diversity is important for two main reasons (Mathie and Greene, 1997): (1) to balance power with the different types of stakeholders (researchers, knowledge brokers, beneficiaries), and (2) to take all experiences and views into account." (p. 79)

Description: This dissertation evaluates, advances, and tests various qualitative methods to assess the impact of research on innovation processes with respect to organic agriculture. The author highlights participatory impact pathway analysis (PIPA); however, it is noted that PIPA is not participatory and only includes a few perspectives. Therefore, the author draws on Mathie and Greene to support the rationale for a PIPA approach that recognizes participant diversity, thereby balancing power between stakeholders while considering differing experiences.

5	Arvidson & Kara (2013)	Greene (2012)	United Kingdom	Dialogue, inclusion, participation of marginalized or underrepresented stakeholders, representing plurality of stakeholder interests and views, values engagement, values prescription

Example Quote: "Evaluation should not only be seen as an exercise applied from outside, with the aim to retrieve information about the qualities of an intervention, but also as a tool aimed at contributing to deliberation and change. Values play a role in making judgements about——valuing——evidence of an intervention and the merits of an organisation. But apart from highlighting social values through describing values and value-creation in interventions, an evaluation can also actively practice and prescribe values (Greene, 2012; Hall et al., 2012) in the context within which the evaluation is carried out." (p. 12)

Description: This article utilizes several of Greene's publications (in addition to Greene, 2012) to frame how evaluation should support the United Kingdom's Social Value Act, which requires the public sector to consider the larger social, economic, and environmental benefits or consequences of the services provided. Greene's values-engaged evaluation serves the authors' development of an evaluation framework that is concerned with the equity, democratic, and social effects of programs. They highlight the need to include the plurality of values present while prescribing certain social values aligned with social benefit.

6	Kwok (2013)	Greene (2012)	Australia	Equity, inclusion, representing plurality of stakeholder interests and views, values engagement

Citing source	Greene source	Context	Concepts[7]

Example Quote: "It is always someone's values shaping the direction of the evaluation. Or, to call upon Greene again, 'values are present in all of our work... values enter our evaluation spaces primarily through decisions about whose interests, key questions and agendas should be addressed' (Greene 2012, p. 195)." (p. 14)

Description: This practice paper is aimed at contributing knowledge to the field of evaluation in the area of health promotion. Its case is an evaluation (with a capacity-building priority) of an equity-focused Australian health program. In the quote, the author draws on Greene's assertion that values are inevitably engaged in the interests, agendas, and questions served in the evaluation.