

Unpacking the evaluator's toolbox: Observations on evaluation, privilege, equity and justice

Karen E. Kirkhart

Keynote Presentation

*Our House, Our Whare, Our Fale: Building Strong Evaluation in
Aotearoa New Zealand*

Annual Conference of the Aotearoa New Zealand Evaluation
Association (ANZEA)

Te Papa, Wellington, 7–10 July 2014

Acknowledgments

Kia ora. Good morning. My name is Karen Kirkhart. Before I introduce myself, I'd like to acknowledge key collaborators whose instrumental and intellectual support contributed to the ideas I bring today. Kelly Lane is a Syracuse evaluation colleague whose thoughtful feedback and strong graphic skills contributed to this presentation. Joan LaFrance and Richard Nichols (whose sudden passing in February has left a very big gap) invited me to participate in conversations on indigenous evaluation that expanded my vision. My CREA colleagues at University of Illinois, Urbana-Champaign,

Stafford Hood, Tom Schwandt and Jennifer Greene, are an ongoing source of intellectual stimulation and support.

Who I am and how I came into evaluation

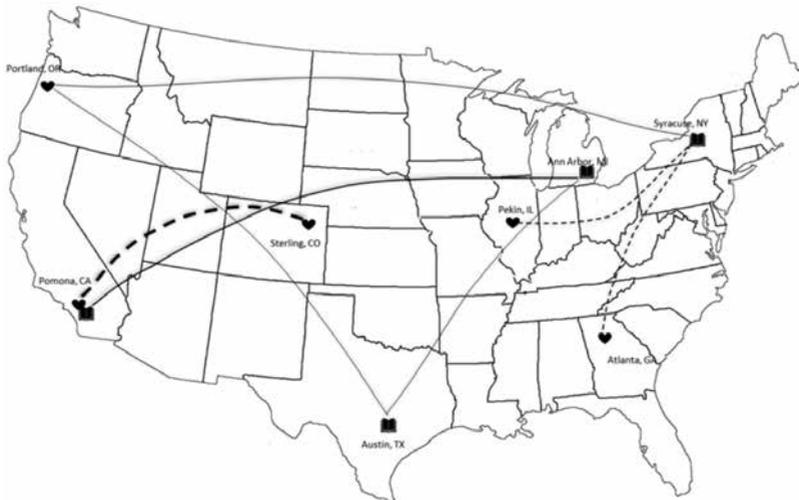
I am the great-granddaughter of German immigrants to the United States who settled on land previously taken from the Iowa, Cheyenne, and Arapahoe Indians.¹ I am married to a fellow evaluator, Nick Smith, and we are proud parents of one son and one daughter. We live in Syracuse, New York (NY), aboriginal territory of the Onondaga Nation, a member of the historic Iroquois/Haudenosaunee Six Nation Confederacy.

I was born and raised in southern California in the working-class suburb of Pomona on the eastern edge of Los Angeles County. I am the daughter of Mabel E. Reinhardt and Harry B. “Kirk” Kirkhart. I am an only child. My maternal grandparents, Jacob B. Reinhardt and Alvina P. Schoenfeld, were dryland wheat farmers on the plains of northeastern Colorado, and my paternal grandparents, Dell S. Kirkhart and Pearl S. Onstott, came from a family of railroad workers in Iowa. I never met either of my grandfathers, but I knew both grandmothers. Grandma Pearl was an independent woman who aspired to live above her means. She wore fancy hats and a fox fur that both fascinated and horrified me; the little fox with its glass eyes biting its tail to secure the stole in place. Grandma Muzzie was a farm wife who could fix anything, sew anything, grow anything, and cook anything. Both sides of my family featured strong women.

I lived in two homes my entire growing up, and they were 1½ blocks apart. Though I haven’t lived in Southern California (SoCal) in over four decades, it still feels like my heart’s place. I love the

1 In Aotearoa New Zealand it is customary to provide both personal history and professional background as part of the opening address. It provides the listener with multiple points to connect to the speaker as well as contextual information to make sense of what is being shared.

art and architecture, the palm trees, the freeways, and the SoCal sensibilities. (It's hard to take yourself too seriously when your childhood frame of reference is Disneyland.) But Pomona is only one of two special places from my early years. My second heart place is the high plains of northeastern Colorado. (See Map.) In the summer, we would travel by train to visit my mother's family. The farm was nothing like California. I joined cousins in farm chores, played in the wheat Quonset, rode horses (poorly, and got bucked off). There were big backyard picnics with aunts, uncles and cousins; it was all about family.



Map. Special places

I was the first in my family to go to college. I attended an exclusive private college (Pomona College) on scholarship—my first close encounter with major social class differences—roaming among majors in French and studio art before settling on psychology. After graduation, I drove my VW across country to The University of Michigan for graduate school—my first encounter with roommates

raised on the East Coast. (Geographic region is a huge source of diversity in the United States.) To briefly note other places of significance before leaving my map, I moved from Ann Arbor, Michigan to Austin, Texas for my first faculty position. But love intervened and I married Nick and joined him in Portland, Oregon where our son was born. Nick accepted a faculty position in Syracuse (which is in central NY, far north of New York City) and I made my second cross-country road trip in yet another VW with our 8-week-old son to join him. The other heart places are significant because they represent family elders—Pekin, Illinois where Nick’s dad still lives, and Woodstock, Georgia where two of my dad’s cousins lived. I was privileged to be a part of their lives in their final years and one of their cats still lives with us in NY.

I entered graduate school with the intent of becoming a therapist and helping people on an individual level, but after finishing my MSW, my interests broadened. I remember the exact moment sitting in my advisor’s (Sheila Feld) office talking about my doctoral studies and potential dissertation topics, and she observed, “You seem pretty excited about evaluation.” She named it, and I was off and running! To this day, I love evaluation and I love to teach. Those are two things I tell my students on the first day of class each semester.

Collectively, my professional training has shaped my sensibilities on privilege. My primary professional identification with evaluation embraces public welfare and social justice in the principles and policies of the American Evaluation Association (AEA). The social work half of my dual degree approaches privilege from perspectives of ethics and cultural competence, while the community psychology half brings the activist focus of action research and social justice. Even my art background contributes an appreciation for what Schön (1983) terms the professional artistry of reflective practice. I have grown up in the evaluation profession. Having now achieved the status of an

elder, I would like to share some reflections on evaluation at the current moment, which is characterised by growing societal inequities that evaluation cannot ignore.

Building a strong evaluation house

In reflecting on a strong evaluation house—the theme of the conference—I want to first acknowledge the wisdom of this conference in focusing attention close to home. I begin with the foundational assumption that we evaluators seek to perform solid, valid evaluation, fully in compliance with standards and guiding principles of the profession, informed by relevant theory and executed with technical competence. We intend to do good work. Moreover, though the terminology may vary, we see our work as supporting improvement in policies, programs, communities, and people's quality of life. Evaluation is not static inquiry; it seeks to inform action for social betterment. Our profession values equity and social justice. Strong evaluation is evaluation that honors and advances these values in the questions it raises, the evidence it gathers, the relationships it builds, and the privilege it carries. While evaluation is on the rise, social betterment has not necessarily followed. Inequality persists, settling as a toxic pollutant in our communities. And it continues to expand, accompanied by a range of social problems (Stiglitz, 2013; Wilkinson & Pickett, 2010). In the United States and elsewhere, gross inequities are visible in wide sectors of society. Reasons are complex and intertwined, but I would like to pull at one strand of the knot today and examine the privilege that evaluation itself and we as evaluators carry. This is, I believe, an important point of reflection. When we fail to appreciate the dynamics of privilege/power surrounding and infusing our evaluation practice, it undercuts evaluation's ability to advance social justice. Inadequate attention to power and privilege allows culture to be read as neutral, rendering systems of oppression

invisible (Sakamoto, 2007). Evaluation may be culpable in perpetuating marginalisation or recreating the trauma of colonisation if the dynamics of privilege are not well recognised and understood.

Recognising privilege

Privilege often reveals itself as negative space—the space that surrounds the objects of our attention, but our attention is not drawn to it. These are things that are noteworthy for their absence; things we can afford *not* to attend to or that we are not obliged to deal with. Concerns from which we are exempt or that we can avoid. For example, as a heterosexual woman, I am not personally confronted by discrimination on the basis of gender identity or sexual orientation. My transgender or lesbian colleagues cannot trade on this exemption.

To create strong evaluation that supports social justice rather than replicating and reinforcing inequities, one must first be aware of the privilege that comes with the enterprise and one's role within it. Evaluation carries gravitas, authority. It is something to be taken seriously. Possibly, it is something to resent or to fear. Rarely does evaluation enter unnoticed and with no reaction; however, it is not always read as privilege. Unrecognised privilege is problematic. It leads to (1) unchallenged privilege; (2) ill-conceived or poorly focused change efforts, and (3) continuation or entrenchment of inequitable status quos. All of these interrupt evaluation's capacity to move a program/community/society toward social justice. I see our mission as learning how to better use evaluation's privilege, self-consciously and deliberately, in the service of equity and justice.

Some of my reflections refer to evaluation theory and the writings of scholars from both dominant and marginalised groups. Some of this is personal, based on my own observations of the privilege I carry both within and outside evaluation. My title is a nod to Peggy

McIntosh's classic "invisible knapsack" metaphor.² McIntosh (2004), speaking of white privilege, envisions "an invisible weightless knapsack" of unearned assets that one cashes in or trades on each day without realising or acknowledging it. Her classic essay, "White Privilege: Unpacking the Invisible Knapsack", enumerated a series of taken-for-granted assumptions ranging from freedom from racial profiling to the convenience of skin-tone Band-Aids; many of these still ring true. The connection of privilege and evaluation has already been made by my CREA colleagues (Greene, 2012; Schwandt, 1997), and Kate McKegg (2014) has specifically connected white privilege and evaluation, citing McIntosh, in her current EES article.

But there is one important difference in my use of the toolbox metaphor. McIntosh's knapsack simply held the privileges; the focus was on its contents. In the case of evaluation, I am suggesting that the toolbox itself is also privileged. Privilege is not only something packed into the evaluator's toolbox but also the structure of the box itself. The dimensions, the hinges and fasteners, how it is secured, and how it is carried. One packs the box with deliberate intention; however, the box itself sets the parameters of what can be packed. What does your toolbox look like? Is it hard-edged and neatly organised, with everything in its proper place in trays and compartments? Is it a woven flax bag or basket, with tools placed in pockets along the side? I am not a tidy person; my toolbox is a canvas bag, overstuffed and overflowing with ideas all stacked together in one central space. It appears disorganised, yet it fits much of what I need. The toolbox may be real (what you use to move your ideas, documents, and symbols around) or metaphorical. Evaluators implicitly bring with them assumptions about how the world works, and their very role imparts

² McIntosh copyrighted this brief excerpt from a larger work in 1988, and it has been reprinted with permission in numerous anthologies, including the citation provided here. More recent online versions contain added items and discussion, but this is the version that first came to my attention. Dr McIntosh is Associate Director of Wellesley College Centers for Women.

these assumptions with privilege.

Having seen myself as someone who works to advance equity and social justice, which often involves pushing against privilege. I was disconcerted to confront the fact that evaluation itself is infused with privilege, and that mine is the face of privilege when I take on that role. And not in a good way. Evaluation may have been conducted with social betterment in mind, but the consequences have often been less than fair. Communities have been over-scrutinised and problematised. In some cases, calls for more evaluation have effectively stalled corrective action. Evaluation can also serve as a means of social control, monitoring compliance with policies that are themselves oppressive.

Unpacking my evaluation privileges: A starter list

I am speaking from the perspective of a career academic and from the position of my own learning in working with cultural intersections in evaluation. The limitations of my understandings will undoubtedly also be visible. Each of you has your own experiences of evaluation privilege, depending on your roles and sites. You may be an evaluator who is in the Academy and partnering with community practitioners, a private consultant working with a diverse range of separate clients, a community member involved in grassroots/“flax-roots” (Cavino, 2013) evaluation, or a government employee seeking evidence for policy development.

By “unpacking”, I mean calling into question invisible/unexamined assumptions rooted in our professional training, our individual characteristics, and our personal and collective lived experiences. Like McIntosh, my own list keeps growing through various opportunities to learn/be shown. It’s a list I started nearly a decade ago. I’ve selected a few illustrations, grouped loosely into categories that seemed to fit. But this is not to grant authority to either my items

or the categories. The intent is simply to stimulate conversation and reflection on your own lists.

Epistemology. World view. Knowledge Building. These are fundamental assumptions I hold about the creation of knowledge and what counts as evidence.

1. I assume that it is logical to organise thoughts as I do.
2. In life and in work, I set goals and assess my progress toward them, assuming that this is a normal human activity.
3. My general ignorance of world history will not significantly disadvantage my evaluation work. I can look up facts and dates.
4. I expect that people will value evaluation as I do. Its potential benefits will be understood and appreciated.
5. If I need to know a culturally-specific piece of information, I can ask.
6. My values are reflected in the *Guiding Principles* and values of AEA.
7. My values are reflected in the values of many political organisations and institutions around me that use evaluative evidence.
8. Everything can be known if I study harder, observe longer, listen more carefully.
9. Means–ends connections make sense. In my experience, following the rules and working hard leads to reward.
10. Observed behaviors are the most solid sources of evidence.

Communication, Language, Expression. These are implicit assumptions I hold about interpersonal and profession communication.

1. I can speak in my customary language, vocabulary, and tone and be clearly understood.
2. I am not significantly disadvantaged by being essentially monolingual.
3. I assume that the professional writing style I follow is “proper”

English and that it is to be emulated.

4. I cheerfully memorise the specifics of APA style; its idiosyncrasies do not hinder my expression.
5. An academic writing style is comfortable. I value a large vocabulary and attention to grammatical rules. Words are interesting, and besides—they make me sound smart!
6. Sharing information is a good thing. This fundamental assumption merits particular scrutiny, as critiqued by Cavino (2013), Jones and Jenkins (2008), and Smith (2012).

Relationship. My privilege is visible in my assumptions about relationships with others.

1. I expect to be welcomed and accepted. My appearance and manner of greeting will not be offensive or create suspicion.
2. I expect that people will want to hear my ideas and that I will be treated with respect.
3. My suggestions will be received as helpful. I especially notice this assumption when I am dismissed or ignored.
4. I can go to meetings of professional evaluation associations and expect to find people who look like me in attendance.
5. I can find articles authored by persons like me in the professional literature.
6. My education and professional experience make me confident in my ability to design and conduct evaluation.
7. If I chose to, I could work in majority settings and pretty much ignore cultural diversity. (So aren't I a good person for engaging this work?—See self-satisfaction below.)
8. I can “take a break” from interrogating white privilege (or other privilege) when it gets too intense.

Methodology and Method. Privilege shapes how I approach my work.

1. If I chose to, I could read only portions of the evaluation literature that are congruent with my values and training and avoid disconfirming information.
2. I have “favourite” authors, and I often trace ideas back to *their* favourite authors.
3. My knowledge of measurement theory, evaluation theory, research design, and data analysis provides a solid foundation for the work I do.
4. If I chose to, I could base my scholarship on secondary data analyses and never enter the communities/census districts that I've sampled.
5. Labels are helpful descriptors in identifying commonalities and differences.
6. My attention to culture is visible in the sampling frames, data collection procedures, response rates, and statistical power of my studies.

Interrogating privilege

My list is open-ended, offered to illustrate invisible assumptions anchored in unrecognised ways in dominant culture. So what questions can sharpen my attention, assist me in expanding my list?

First, I can reflect on the human element in my evaluation. Who defines/assigns the roles in this evaluation? What assumptions are made about the parameters of “collaboration”? What about assumptions concerning the talents and expertise of those entering into collaboration? Who do I really think is wisest and in what ways? It's always informative to notice what annoys me or catches my attention as not the “right way” to proceed.

Second, I must think critically about how an evaluation is framed. Who selects and phrases the questions to be answered in this evaluation? In what language(s) are the questions expressed? If there is a

“problem” focus underlying the questions, who has defined what is considered to be a problem? And is there a way to locate the evaluation without problematising? Are the questions framed in a way that constrains the scope of the answers? Have I included opportunities for disconfirming my assumptions, discovering my ignorance, and coming to new understandings from alternative perspectives?

Third, the time frame of my evaluation speaks to privilege and my presumptions of access to information. Who sets the time frame of the evaluation? How does the time frame place parameters on understanding? What kinds of information or evidence will my evaluation need to gather, and what entitles me to have access to this information?

Fourth, the influence I hope to achieve through my evaluation offers clues to the exercise of privilege. Who will benefit from the answers to these questions? What assumptions am I making about who should see the results? What are the aspirations for intended use? By whom? Is there a high potential for misuse? How does privilege work in this context to advance or obstruct change?

Working with privilege

So we can (and must) sharpen our awareness of privilege, but then what? How can this work toward greater equity and justice? How does privilege relate to equity? Often, these two ideas are placed in opposition to one another—privilege as “the flipside of inequality” as Kate McKegg (2014, p. 6) suggests. While it is certainly true that privilege can create and perpetuate inequality and that working toward greater equity can challenge privilege, as evaluators we need to also be vigilant for more subtle connections between privilege and equity. Privilege can create blinders that keep us from recognising inequities around us as we plan our evaluations. It can lead us to stay within our comfort zone (because there’s nothing to push back

against to decenter or disrupt a privileged position—a fish unaware of the water it swims in). But in some ways, evaluation privilege can also be a gift—insofar as it moves us toward renovating and improving our house. Privilege can reveal ways in which our work is biased—infused with assumptions that perpetuate inequity—so that we can grow and change. Privilege can show us ways in which we are working at cross purposes with our intentions so that we can become more effective in advancing social justice. And perhaps most significantly, privilege gives us options—both to yield our privilege and to use it to advocate for and promote equity.

Advancing equity requires yielding privilege in evaluation relationships. I must be willing to disrupt longstanding hierarchies and invite new voices to the conversation. “Privileging others’ voices, values and traditions is a stance we must take if we are to shift the balance of power” (McKegg, 2014, p. 6). I must be ready to step back and be open to nonparticipation or to taking a “back seat” that makes my role less visible. I’m speaking here of *truly* yielding privilege, not being a back-seat driver who is still trying to control the ride. This is hard work.

I can consciously share privilege, balance it, offset it, but this is where it gets tricky—I can’t erase it.

As an evaluator, I cannot divest myself of privilege. I can’t shed it like an uncomfortable piece of clothing. I can’t give it away. My students have taught me this in no uncertain terms. I coach, mentor, encourage, motivate but ultimately I evaluate their mastery of course content, so the playing field between us is never level. They don’t mistake me for a peer or a friend while I am also their evaluator.

In evaluation, contingencies built into systems and the dynamics of the evaluation enterprise mean that privilege is never erased. Transparency and collaboration, properly established, may generate trust, but the evaluator role still holds power. I must use this power

mindfully in ways that are justice enhancing. I must be vigilant in recognising the power dynamics of collaboration (Jones & Jenkins, 2008). And sometimes, I must simply know when to get out of the way: for example, creating space for indigenous evaluation by indigenous evaluators (Cavino, 2013; Smith, 2012) or respecting the assertion of the disability community, “Nothing about us without us!” (Charlton, 2000).

Caveats that keep me humble in this work

As much as we may be united in our vision of a strong evaluation house, supporting equity and justice, recognising and embracing privilege, the path forward is not without complexities and risks. Despite our best intentions, there are still many ways to get distracted or side-tracked.

In the first place, not all methodologically strong evaluators concern themselves with culture. I have evaluation colleagues of high repute whose technical expertise is beyond reproach, who do important work in multicultural contexts and behave respectfully toward persons from whom they are collecting data, but who do not see themselves as “culture people.” Their *agenda* is different. They use their methodological and interpersonal skills to attain adequate sample size and statistical power, maximise reliability of data collection, minimise missing data, etcetera. I am arguing not so much for new skills but a new lens. I’m not suggesting that tools such as validity must be removed from our toolboxes, but I am seeking to reposition them in a context that is more self-conscious about our own privilege.

Second, it is important not to become self-satisfied or smug in our reflections. A feeling of greater awareness/competence/empathy/appreciation than others should signal us that privilege is afoot: “I get it; they do not.” This is tricky, since we are invited for our perceived competence or expertise in making judgments and determinations of

value. *That* privilege cannot be set aside, but the dynamics it creates must continually be interrogated.

Third, it is important not to circumvent hard truths. I believe we evaluators must name and confront specific, ugly realities: racism, sexism, homophobia, and bigotry based on language, national origin, religion, disability, sexual orientation and other intersections of power with prejudice. Focusing on “inequality” may mask hard truths by giving us something more palatable to oppose. (To me, this offers a powerful example of exerting privilege by defining others’ realities to better fit our comfort zone.)

Fourth, at the same time, it is important to avoid getting stuck in single categories that mark privilege/ discrimination. Singular cultural dimensions rarely define the whole person or whole context. It is important to examine diversity within plus intersections among cultural identifications as we renovate our house (Ridley, Mendoza, Kanitz, Angermeier & Zenk, 1994). Intersecting personal characteristics—skin colour, social class, nationality, gender, age, language—shape my privilege in the context of evaluation. The ways in which privilege attaches to my identifications can be fluid, as well as the salience of the identifications themselves (Kirkhart, 2010). In a specific local context, my sexual orientation or (dis)ability status may be irrelevant. In one context, nationality, age or gender might carry privilege, and in another be sources of disregard, dismissal. Such shifts in the alignments of my privilege provide powerful, sometimes painful, learning opportunities. For example, when Joan LaFrance and Richard Nichols invited me to attend a work session on their indigenous evaluation framework in Albuquerque, New Mexico, my being white, an evaluator, and a social worker were immediately cause for mistrust and suspicion (and eventually confrontation) among several of the American Indian participants. I had anticipated the first, was not completely surprised at the second, but had no awareness of the

third when I entered that context.

Fifth, in the service of social justice, reflection cannot replace action. At a societal level in the United States, Howard (2014) has written of *paralysis* as an unintended consequence of monitoring and regulation; that is, inaction and requests for still more studies in lieu of actually risking change. The same can apply at a personal level. Reflection on one's privilege should not be the end state. Social justice requires both individual and collective action to change the dynamics.

Closing

In his 2007 AEA Plenary Address, Schwandt (2008, p. 145) noted the proliferation of Google hits for “evaluation toolkits.” He admonished us as evaluators to avoid “manualizing and proceduralizing” evaluation and instead of toolkits, develop more “evaluation-*thinking* kits” [emphasis added]. I support this emphasis and propose that reflection on privilege is a critical part of evaluative thinking.

The house of evaluation is a house of privilege. It is time for us to examine the privilege that our toolbox represents, and to wrestle with how we can better acknowledge, appreciate and modify how we use it. Evaluation privilege can't be given away; it comes with the territory. But in the service of social justice, it cannot be squandered. Once recognised, it must be directed, shared, employed, and *balanced* to reduce inequality. No disrespect intended to Audre Lorde (1984), but I believe that privileged tools *can* be reclaimed, redefined and repurposed as well as replaced. And perhaps, it's time to get a new toolbox!

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