Reflections on Evaluation:
An "Organizational Leadership" Perspective
(drawing from the CAISE evaluation forum)

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Some useful definitions

- "Program evaluation is the systematic collection of information about the activities, characteristics, and results of programs to make judgments about the program, improve or further develop program effectiveness, inform decisions about future programming, and/or increase understanding." (Michael Quinn Patton)

- "Evaluation is the systematic assessment of the operation and/or the outcomes of a program or policy, compared to a set of explicit or implicit standards, as a means of contributing to the improvement of the program or policy." (Carol Weiss)

- "Evaluation is the process of delineating, obtaining, and providing useful information for judging decision alternatives." (Shufflebeam) The most important is the delineation of what really needs to be known and the values it encompasses. In delineation you also have to consider the provision idea and usefulness.

Key evaluation stakeholders

- "Obvious"
  - Client organization
  - Funder/sponsor

- "Not so obvious"
  - Audience
  - Other organizations
  - "The ISE field"
  - Congress?

- If we consider unintended users up front, can we create and disseminate more broadly useful studies?

- How do we balance serving specific program needs vs. informing the field?

Evaluation benefits

- Foster reflection
- Promoting organizational learning
- Prove "worth" of a project
- Promote improvements
- Inform future efforts
- Advance the field
- Stimulate innovation and creativity

Fostering reflection

- Summative evaluations should act as an intentional point of reflection... that systematically and purposefully causes the project team to reflect on what was developed, what was considered, and what was achieved in an effort to inform their work and the work of others...

Promoting organizational learning

- "Evaluation equals learning"

- What strategies are effective? Why do they work and in what circumstances? If something is not working, why not?

- Evaluators need to translate data into action items and broader understandings - both for their clients and to the field.

Proving worth

- Document impact on visitors, participants, etc.

- How can we attribute impact when there are confounding or contextual factors?

- But need "valid and reliable" assessments of the learning that occurs at/with our institutions… all too often the assessments out there to measure learning at our sites have been crafted for the formal classroom setting

- Articulate benefits to stakeholders

- "If museum fails to engage or meet the needs of the visitor, it has failed. Good evaluation can produce knowledge of the ways in which museum (or any program) is and is not being successful in serving the visitor and society more broadly."

- Assess return on investment

Promoting improvements

- "Evaluation should seek to improve our worth, not just prove our worth." (Christine Reich)

- How can we make sure that summative evaluations can provide feedback for improvement (formative) or inform a new project (front-end)?

Informing future efforts

- Build on what others have learned... avoid making the same mistakes again

- Need to tease apart the project results – which aspects of the project design should be replicated and translated into best practices

- Disseminating lessons learned regarding "dead end strategies" is as important as spreading the word about successes.

Advancing the field

- Need more "meta studies"

- How can we aggregate data and findings across projects?

- Need commonly methods and benchmarks (e.g., Serrell's tracking/timing study)

- How do we legitimize negative findings when funder, ISE organization, and evaluator all want to find a project "basically successful"?

Stimulating innovation

- How can we use what we know from the past to think creativity about solving problems in the future?

- What key messages from other summative evaluations will inspire us to see things from a new angle, to take a risk on something new?

Developmental evaluation

- How can we fully integrate evaluation into our planning, decision-making, and management processes?

- This implies no hard, fast distinctions between front-end, formative, remedial, or summative but rather a continual integration of information and data that feeds decision-making and process management

- Developmental evaluation is a constant process that is always trying to develop and adapt the program to respond to museum management's current priorities. Several years later, management's priorities can be very different from the funding agency's original reasons for funding

Evaluator as facilitator

- Helps teams to articulate their goals and their underlying logic of how their actions will lead the accomplishment of those goals

- Skilled at engaging the study's stakeholders in discussions about the meaning of the data and its implication for their practice

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- Ability to help stakeholders identify the right questions to ask, and then design a study that most appropriately addresses those questions

- "Well over half my work on projects is guiding a group's thinking, leading them to critical reflection and questioning. Another large piece of our work is helping projects lay bare their underlying or operationalized theories."

Better communication

- How can we plan for dissemination up front?

- Beyond reports – better "storytelling"

- "Drop a word, gain a reader" – importance of brevity

- Can we develop checklists like those in the medical profession to help promote best practices and avoid mistakes?

How can we improve organizational capacity for evaluation?

- Need adequate staff and resources to conduct legitimate evaluation studies beyond satisfaction measures

- Institutions are increasingly asked to conduct evaluations, yet do not have the internal skill sets and find themselves in tight financial situations that make it hard to hire an external evaluator.

- Interns can help, but need support of experienced evaluators and ability to challenge their intern manager if the evaluation reveals a less-than-positive finding.

- Supporting ISE staff in learning how to do some level of evaluation work can help them appreciate better what goes into a good evaluation; learn how to be a better evaluation client; explore a possible career pathway; and build the capacity for in-house evaluation work as a complement to third party evaluation.