



EvaluationLive!®
Engaging the evaluation experience

EvaluationLive!® Resources and Links to Literature

This list is a work in progress. We invite others to suggest additional references and their relevance to the EL! model by emailing Melanie Hwalek at mhwalek@specassociates.org.
Learn more about EvaluationLive!® at www.EvaluationLive.org.

Overall Gestalt of EvaluationLive!®

Concept of Flow (conceptual catalyst for EvaluationLive!)

Csikszentmihalyi, M. (2004, February). *Mihaly Csikszentmihalyi: Flow, the secret to happiness*. [Video File] Retrieved June, 2013, from Ted Talk website: http://www.ted.com/talks/mihaly_csikszentmihalyi_on_flow.html.

RELEVANCE: This TED talk and a plethora of writings about flow by Csikszentmihalyi and others in the positive psychology movement provide a definition for what the EL! model asserts is the ultimate experience of stakeholder engagement with the evaluation experience. “Flow” refers to the personal feeling of total engagement with what one is doing. Csikszentmihalyi asserts that flow happens for the individual when there is the perception of a highly challenging task and simultaneously the perception of having the skills to meet the challenge. EL! asks the question of whether evaluators can create a gestalt of the evaluation experience that increases the probability that people will experience flow during evaluation encounters.

Context

Fitzpatrick, J. L. (2012). An Introduction to Context and Its Role in Evaluation Practice. In D.J. Rog. J.L. Fitzpatrick, & R. F. Conner (Eds.), *Context: A framework for its influence on Evaluation. New Directions for Evaluation, 135*, 7-24.

Conner, R. F., Fitzpatrick, J. L., & Rog, D. J. (2012). A first step forward: Context assessment. In D.J. Rog. J.L. Fitzpatrick, & R. F. Conner (Eds.), *Context: A framework for its influence on Evaluation. New Directions for Evaluation, 135*, 89-105.

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If you wish to collaborate on the study of EL!, contact

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Operationalizing EL!

Fischer, B, and Williams, J. (2011). [PowerPoint slides] *The Half-Naked Rubric: Creating Collaboratively Developed Tools to Measure Education as Intervention*. Retrieved June, 2013 from American Evaluation Association website: <http://www.eval.org/>.

Importance of Practice

Chelimsky, E. (2013). Balancing evaluation theory and practice in the real world. *American Journal of Evaluation*, 34(1) 91-98.

King, J. A, and Stevahn, L. (2013). *Interactive Evaluation Practice*. California: SAGE

RELEVANCE: Interactive Evaluation Practice (IEP) presents seven principles that evaluators should attend to in order to bring the interpersonal factor of evaluation to life. Principles #2-#6 are related to the evaluator being astute to the political, cultural and positive-interdependence aspects of evaluation practice.

Evaluation Anxiety

Bechar, S. and Mero-Jaffe, I. (2013) Who Is Afraid of Evaluation? Ethics in Evaluation Research as a Way to Cope with Excessive Evaluation Anxiety: Insights From a Case Study. *American Journal of Evaluation*, 35(3) 364-376.

RELEVANCE: Evaluation anxiety can be thought of as the extreme opposite of flow; what the EL! model aims to avoid. The authors provide a nice summary of research and professional writing about evaluation anxiety. The article provides an excellent case study of what can go wrong in an evaluation; the case could be diagnosed from the perspective of EL!

Donaldson, S.E., Gooler, L.E. and Scriven, M. (2002) Evaluation strategies for managing evaluation anxiety: Toward a psychology of program evaluation. *American Journal of Evaluation*, 23, 261-273.

RELEVANCE: This article appears to be the first use of the term “extreme evaluation anxiety” or XEA which is now referenced in the evaluation literature. The authors conclude that “more than technical skills are needed to conduct high quality evaluations” (p. 271) and set the stage for EL!

EL! Evaluator Characteristics

Competence: the evaluator is credible, culturally humble, and knows methodologies, measurement and management.

Content Expertise: the evaluator has or acquires sufficient knowledge about the topic or intervention being evaluated to make meaningful interpretations of the findings and to have smart conversations with stakeholders.

Flexibility: the evaluator modifies the evaluation design as the need dictates and provides stakeholders with meaningful information at the right time, even if this means accommodating unanticipated deadlines.

General

King, J.A., Stevahn, L., Ghere, G. and Minnema, J. (2001) Toward a Taxonomy of Essential Evaluator Competencies. *American Journal of Evaluation*, 22 (2) 229-247.

RELEVANCE: The competencies are consistent with the overall EL! model, with particular emphasis on competence, content expertise and communication skills.

Cultural Humility

AEA and CES *Program Evaluation Standards*.

Finn, J., and Jacobson, M. (2008) *Just Practice: A Social Justice Perspective to Social Work*. (2nd ed.). Iowa: Eddie Bowers Publishing, 233–244; 219-222.

Management

Dibble, S. (January, 2013). [Video File] *Project Management for Evaluators*. Retrieved June, 2013, URL from Center for Evaluation Video presentations: <http://vimeo.com/58618129>.

Roholt, R.V. and Baizerman, M. L. (2012) (Eds.), *Evaluation advisory groups. New Direction for Evaluation*, 136.

Langlois, M., Blanchet-Choen, N. and Beer, T. (2013) The Art of the Nudge: Five Practices for Developmental Evaluators *The Canadian Journal of Program Evaluation*, 27 (2); 39-59.

RELEVANCE: The authors describe the “nudge” as the moment when the developmental evaluator brings data and observation to a team of innovators and decision makers so they can move closer to their goals (p. 46). This is related to the idea of the EL! evaluator bringing the right information to the right people at the right time.

Lederman, S. (2012). Exploring the Necessary Conditions for Evaluation Use in Program Change. *American Journal of Evaluation*, 33(2) 159-175.

Patton, M. Q. (2008). *Utilization-Focused Evaluation*. (4th Ed). California: SAGE

Communication skills: the evaluator is adept at asking good questions, managing conversations, teaching, presenting, listening and writing.

Dewey, J.D., Montrosse, B.E., Schroter, D.C., Sullins, C.D. and Mattox II, J.R. (2008) Evaluator Competencies: What's Taught Versus What's Sought. *American Journal of Evaluation*, 29 (September) 268-287.

RELEVANCE: The article reports on a study of job seekers, employers and AEA's job bank and explores competencies reported by evaluators learned during graduate school and those desired by employers. Among the top five skills highly valued by employers were communication skills such as presentation skills, relating to stakeholders, report writing.

Evergreen, S. (2013). *Presenting Data Effectively: Communicating Your Findings for Maximum Impact*. California: SAGE.

Finn, J., and Jacobson, M. (2008). *Just Practice: A Social Justice Perspective to Social Work*. (2nd ed.). Iowa: Eddie Bowers Publishing, 240.

Geva-May, L. and Thorngate, W. (2003) Reducing anxiety and resistance in policy and programme evaluations: A socio-psychological analysis. *Evaluation.*, 9, 205-273.

RELEVANCE: The authors present case studies of evaluations and present an analysis that discriminates those evaluations where anxiety and resistance were present and those without. One of their suggestions for reducing anxiety is that "Evaluators who serve as conveyors of information, mediators, supporters and advocates are more likely to induce feelings of reliance, interest and trust in the evaluatees. (p. 223),

King, J. A, and Stevahn, L. (2013). *Interactive Evaluation Practice*. California: SAGE.

Langlois, M., Blanchet-Choen, N. and Beer, T. (2013) The Art of the Nudge: Five Practices for Developmental Evaluators *The Canadian Journal of Program Evaluation*, 27 (2); 39-59.

RELEVANCE: The authors found in their research that three indispensable skills of servant leadership are very important in developmental evaluation: “using an appreciative lens, listening deeply and integrating reflection and practice” (p. 46) They also found that in determining what feedback to emphasize, there was “value in focusing on the ideas and actions that carried energy.” (p. 49)

Royse, Thyer, Padgett, 2010 p. 388; *Checklist for Writing and Assessing Evaluation Reports*.

Torres, R.T., Preskill, H.S. and Pointek, M.E. (1996) *Evaluation Strategies for Communicating and Reporting* Thousand Oaks, CA: Sage.

RELEVANCE: The book contains a myriad of methods for improving the communication in reporting evaluation findings.

A learner attitude: the evaluator is as much a learner as s/he expects clients to be, learning about both the program being evaluated and how to improve his/her own evaluation skills.

Finn, J., and Jacobson, M. (2008). *Just Practice: A Social Justice Perspective to Social Work*. (2nd ed.). Iowa: Eddie Bowers Publishing, 290; 400-403; and 233 – 253.

Kahneman, D. (2012). *Thinking, Fast, and Slow*. New York: Farrar, Straus, and Giroux.

King, J. A. (2008). Bringing Evaluative learning to Life. *American Journal of Evaluation* 29(2) 151-155.

Preskill, H. (2008). Evaluation’s Second Act a spotlight on learning. *American Journal of Evaluation* 29(2) 127-138.

Schon, D. A. (1983). *The Reflective Practitioner: How Professionals Think In Action*. New York: Basic Books, Inc.

Symonette, H. (2014) Facilitation as a *Way of Being* In Service to a Greater Good: Some Personal Journey Reflections. *New Directions in Evaluation*, May

RELEVANCE: Boundary spanning evaluation practices and facilitation are foundational to our work and involve regularly “checking in” regarding whose voices are being heard and assiduously tracking, monitoring and coaching ourselves. Evaluations must practice “360 degree listening with (our) whole being” and use

“double-sided mirrors” and clear-eyed assessments of our readiness and preparedness (page 9).

EL! Clients

Embraces learning: the client (organization) is interested in learning about its work, values taking time to pause and reflect, and truly appreciates less than perfect data and program results.

Drives questioning: the stakeholders co-create the evaluation questions with the evaluator and constantly want to ask more questions.

Champions the evaluation: someone among the stakeholders, usually the person who commissions the evaluation, is a champion for the evaluation. The champion understands the value of evaluation, can anticipate what information would be useful, can put the right information in front of the right people at the right time, and can motivate the organization to pause and reflect on its work.

Preskill, H. S, Druss-Eft, D. (2005). *Building Evaluation Capacity: 72 Activities for Teaching and Training*. California: SAGE.

Rotondo, E. (2012). Lessons Learned from Evaluation Capacity Building. In S. Kusher & e. Rotondo (Eds.), *Evaluation voices from Latin America. New Directions for Evaluation, 134*, 93 - 101.

Taylor-Ritzler et al. (2013). Understanding and Measuring Evaluation Capacity. *American Journal of Evaluation 34(2)* 190 - 206.

Labin et al. (2012). A Research Synthesis of Evaluation Capacity Building Literature. *American Journal of Evaluation 33(3)* 307-338.

Fisher, S., Abdi, D, E., & Ludin, J. et. all. (2007). *Working with Conflict: Skills & Strategies for Action*. (4th ed.) UK: Responding to Conflict, 157-167 and 73-77.

Compton, D.W. and Baizerman, M. (2011) *Managing Evaluation: Responding to Common Problems with a 10-Step Process*. *The Canadian Journal of Program Evaluation, 25(2)*, 103-123.

RELEVANCE: The authors present a model for managing evaluations that lifts up the role of evaluation facilitator and working with advisory groups of intended users as a step to take prior to determining the evaluation design. They note as “crucial” the placement of “a person or group in charge of coordinating the multiple activities necessary to create demand for evaluation as a regular and routine part of an organization’s work.” (p. 107)

King, J. A, and Stevahn, L. (2013). *Interactive Evaluation Practice*. California: SAGE

RELEVANCE: Interactive Evaluation Practice Principle #1 states that the evaluator should “get personal.” This includes “Find(ing) people who care about the evaluation and its results, especially primary intended users.” (p. 61)

The Community Tool Box. (2013). *Troubleshooting Guide for Solving Problems: Common Problems, Reflection Questions, and Links to Support Tools*. Retrieved June, 2013 from the University of Kansas website:

http://ctb.ku.edu/en/solveproblem/Troubleshooting_Guide_6.aspx.

EL! Relationship

Shared Responsibility: the evaluator makes every effort to meet the needs of the stakeholders, while the client/champion recognizes that evaluation takes time and resources and works with the evaluator to make certain that the demands of the evaluation do not go beyond the resources available.

King, J. A, and Stevahn, L. (2013). *Interactive Evaluation Practice*. California: SAGE

RELEVANCE: Interactive Evaluation Practice Principle #7 states that the evaluator should “take time.” This includes “Think(ing) of IEP as a journey that involves shared decision making and constructive conflict resolution.” (p. 61)

Trust: both the evaluator and the client/champion truly believe that they are in each other’s corner, that they can reveal their struggles without repercussion, and that nothing about the evaluation findings will “leak” or be revealed without the client’s knowledge and approval.

King, J. A, and Stevahn, L. (2013). *Interactive Evaluation Practice*. California: SAGE

RELEVANCE: Interactive Evaluation Practice Principle #7 states that the evaluator should “take time” and that “interpersonal processes take time; be ready to devote time to what matters for successful IEP.” (p. 61)

Symonette, H. (2014) *Facilitation as a *Way of Being* In Service to a Greater Good: Some Personal Journey Reflections*. *New Directions in Evaluation*, May

RELEVANCE: Sustainable trust and relationships are necessary for authentic engagement.

Equality: the champion, stakeholders and evaluator are all in the relationship to learn.

Langlois, M., Blanchet-Choen, N. and Beer, T. (2013) *The Art of the Nudge: Five Practices for Developmental Evaluators* *The Canadian Journal of Program Evaluation*, 27 (2); 39-59.

They are all experts in their own way and recognize/respect this in each other.

RELEVANCE: The authors talk about creating common space where “positional authority was downplayed and informal language was used by all.” (p. 51)