

TrendSetters

“Conversations with innovators in learning and technology”

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Fred: Hi Jane! Thanks for participating in the TrendSetters Column! Would you share what field you are in, and a little bit about how you got there?

Jane: Thanks for inviting me, Fred! I originally trained in organizational psychology, with a focus on organizational culture change. During my doctorate at Claremont Graduate University, I discovered an exciting young discipline called Evaluation that made total sense to me. Think about it: if you were fascinated with how to design and implement highly effective organizational change, why on earth wouldn't you want to evaluate how well that was working?

At Claremont I was lucky to have the opportunity to study with some of the leading thinkers in evaluation, including Michael Scriven, a founding father of the discipline, who chaired my dissertation. Evaluation was a relatively small field at the time, but now it's grown into a sizeable professional community, with more than 50,000 evaluators worldwide in 200+ professional associations.

I've been working in evaluation for more than 20 years now, and loving it. I started off at Western Michigan University when Daniel Stufflebeam recruited me to be his Associate Director of The Evaluation Center and to design, launch, and direct the world's first fully interdisciplinary Ph.D. in Evaluation. After a few years there I moved home to New Zealand, where I ran my own evaluation consulting business, Real Evaluation. In 2015 I returned to the States, and am now based in Seattle.

Fred: That sounds like a star studded start to evaluation! How does evaluation impact things such as training, education, business practices, or instruction?

Jane: Want to set your work up for success, make sure it's designed right, and that everyone is clear what "success" is going to look like as it emerges? A little help from an evaluative mind is a fantastic investment at the front end, especially when you are trying to break new ground.

A good evaluator can help you define even those all-important learning or change outcomes that might seem unmeasurable, give you a way to track them, and show the value of what you do.

Having an evaluator by your side is like having an awesome coach and critical friend who isn't just using their own savvy and yours, but gathers actual evidence to help you figure things out. They can also walk alongside you, helping you figure out your design as you build and learn quickly what's working, what's not, for whom, and why.

Fred: It's interesting how complementary evaluation is to so many different efforts. I like the metaphor of an "awesome coach" and a "critical friend" as well because evaluation supports effective practice through critical feedback about what is and isn't working. How would you describe your work in the field?

Jane: Most of my work at the moment is either providing strategic evaluation advice and support to clients, helping build evaluation capacity, or helping build evaluative thinking and frameworks into program, policy, and system change design. I work across many sectors, including education, health, business, international development, and community/social change.

What I love most in evaluation is helping people capture those really important outcomes that often get ignored because there aren't any simple indicators available—or there are, but they miss the point. If you get good help with this early on, you don't end up in "indicator purgatory", trying desperately to look successful on a bunch of indicators that feel like the *least* important thing you do.

Fred: Finding the right indicators is a big deal, and doing it up front is a critical skill. My personal approach has evolved from simply prototyping my way into a functional system to include a more robust exploration of key factors at the beginning. Like Ben Franklin said, "an ounce of prevention is worth a pound of cure." How did you decide to become involved in that area?

Jane: This focus on capturing the intangibles actually stemmed from some work I was doing prior to my doctorate, in HR and industrial and organizational (I/O) psychology. I was asked to review a Management By Objectives performance appraisal system. What struck me was the universal frustration that the SMART goals and targets being measured weren't capturing what was actually most important about job performance. And the tools from I/O psychology weren't helping me solve it one bit.

Remember this: If it's possible for someone to look good on a performance appraisal (or any performance tracking system) but *not* actually be doing a great job - or vice versa - your measurement/assessment/evaluation system needs an overhaul!

Fred: That statement is right on.

Jane: One of the founding fathers of evaluation, Donald Campbell, taught us this. The more you focus on narrow indicators of success and use them for high-stakes decisions, the more useless those indicators become because people have no choice but to manipulate them.

High-stakes testing is the classic example because it pushes educators to teach to the test instead of focusing on what kids really need (like critical thinking, problem solving skills, and high-level understanding of key concepts). Those important outcomes are harder to measure and so they get ignored—at our peril.

Over the years I have developed a substantial body of knowledge on how to design and use evaluative rubrics to capture evidence of change. I've created them for student assessment, school and organizational assessment, performance appraisal, program and strategic policy evaluation. I'm working on two books this year that bring together decades of experience working with rubrics in different settings.

Fred: I agree with you about the dangers of basing everything on high stakes testing, and that is exciting news about the books! I was looking for a solid work on rubrics within the last year and was hard pressed to come up with good resources in that area. I am looking forward to seeing what you put together! What are two works by other people that you found very provocative or informative?

Jane: One volume that I loved early on was Michael Scriven's *Hard-Won Lessons in Program Evaluation*. It's provocative stuff that doesn't mess around in trivial details but speaks to the really big issues in evaluation. It's done with incisive wit, and is an all-time classic. A great read, bound to make you think!

Another that leaps to mind and that I keep coming back to for lessons is Heath and Heath's *Made To Stick: Why some ideas survive and others die*. Whatever field you are in, most of us are in the business of trying to convey ideas and understandings, and making them stick in people's minds. That's true whether you are an educator, a trainer, an evaluator, or a leader. These guys bring the best of the best of what we know from the psychology of communication, and provide a ton of really good practical lessons we can all apply in our work, now!

Fred: I will have to check out Scriven's book, but I can definitely say that the Heath brother's *Made to Stick* was an excellent work. It ties very well with thinking around Instructional Design, and is very universally applicable, as you noted. Would you name a few people who have had the most important impact on your career?

Jane: A professor I had in New Zealand by the name of Mike Smith. He really gave me a feel for practical problem solving, helped me not get lost in the "researchy" details.

Michael Scriven, who taught me what was fundamental and distinctive about evaluation, which set me forth on a wonderful career path building practical methodologies to help people get it right.

Patricia Rogers - one of the best examples of a truly eclectic global critical thinker who can synthesize diverse concepts into truly coherent practical advice that really works. We created a blog together, at <http://GenuineEvaluation.com>, and had so much fun thinking and writing about the issues.

Nan Wehipeihana - helped me understand far more deeply who I was as a kiwi (New Zealander), how that drives what I bring to my professional work, and how valuable it is to know that and be the best "me" I can be!

Stephanie Evergreen - a young, emerging evaluator and dataviz guru. I love the way she brings her whole authentic self to her work, and people respond to it. An awesome entrepreneur as well!

Fred: That is a great list! Stephanie was also interviewed in this column recently! Wonderful person. Visiting New Zealand is on my bucket list as well. I will have to research some of the other names, but it is clear that they each gave you something unique! What major trends do you see influencing the field right now and in the near future?

Jane: A big one in recent years has been the long-overdue move away from rigid, mechanistic goal achievement models of design and evaluation. Identify goals, find some indicators, measure. Met = good, didn't meet = bad. Oh dear, that was soooo last millennium!

We now have a far better understanding of the *complexity* of the world we live in. I don't mean that it's complicated; I mean that much of the change we need to create is emergent and unknowable in advance. It can't be designed or predicted to the nth degree up front, but has to be developed and captured as we go. We don't live in a linear, predictable world. In fact, the more we are truly innovating, the more we are journeying into the unknown.

Those working in program, policy, change, and instructional design are starting to realize that and make emergent change happen, and evaluation has been catching up. Check out the fascinating work on developmental evaluation and systems approaches.

Fred: The realization of environmental complexity is certainly growing in many fields. I am a fan of Dave Snowden's Cynefin (pronounced: Kun-Ev-in) Framework because it helps leaders consider the type of environment they are in (i.e., simple, complex, complicated, chaotic, or in disorder) and take action based upon the analysis. What other trends have you seen?

Jane: Another major trend is culturally responsive and culturally relevant models of evaluation. For a long time it was one of the best-kept secrets that some of the most exciting developments in evaluation (and best conference presentations) were coming out of the indigenous evaluation space and the work being done by evaluators of color. When someone else helps you see your professional world through a whole new lens, it is truly a gift.

The other big one has been dataviz—taking our work out of the stodgy dark ages of “death by powerpoint” and phone book-sized reports. We are now into a new era where the work looks sharp, and we actually make sense to lay people!

Fred: Those are both very powerful trends! The ability to critically reflect upon a field from a variety of perspectives is essential for growth, and the ability to communicate our best qualities to those outside the field in a way that makes sense is very important. Both are very exciting! What major research gaps or areas of need do you see in the field of evaluation?

Jane: The biggest problem I see right now? There is still far too much gravitation towards measuring what's easy to measure and then getting trapped in a vicious indicator-chasing cycle using simplistic methods that are easy to sound bite. This is true in educational testing, performance appraisal, social impact investment, program and policy evaluation, and beyond.

Crappy evaluation is literally ruining people's lives (ever experienced a truly awful performance appraisal, grant monitoring, or assessment system?); it is distracting us away from what's truly important in favor of what's easily measured (chasing indicators like test scores); and it's not helping us get the best societal outcomes for our taxpayer (or philanthropic, or business) dollar.

How do we break through that? Talk and work across the disciplines. Read *Made To Stick* and get better at communicating the important stuff. The only reason we have ended up in this so-called “post-truth” era is that those who prefer “truthiness” and false news are FAR better at the communication game. It's time to fight fire with fire.

Fred: Communication is a vein that runs through every human endeavor. Opening yourself to new perspectives, and communicating what you find effectively, are the only ways to begin a dialogue, which in my view is the only real way to grow substantially. What advice do you have for new researchers/practitioners who are just beginning in the field?

Jane: Get to an evaluation conference near you. Soak it up. Hear the speakers everyone raves about. You will feel like a kid in a chocolate factory.

Seriously. This is true even if you don't identify professionally as an evaluator.

ALL of us, whatever work we are doing, are trying to create change in the world. But how will you know if it's happening? You may see it with your own eyes, but can you credibly demonstrate it to your leaders, funders, and community?

Are you sick of tedious reporting requirements that all focus on the stuff that doesn't matter? Learn how to create your system that will measure what really matters. Or, find someone who can help!

Fred: Great advice! Is there anything else you would like to say or be asked?

Jane: I'm very happy to chat with people who want to know more. On my website, <http://RealEvaluation.com>, you can find links to my twitter feed and blog (Genuine Evaluation), and you can sign up for my newsletter. It's low traffic right now, but I have plans to write some more this year as I work on these books about rubrics!

Fred: Great! Jane, thanks so much for participating in the TrendSetters column! We will be keeping an eye out for your new books!

Jane: Thanks so much for inviting me, Fred. As we say in New Zealand, kia ora!