

THE EVALUATION ADVISOR: A NEW ROLE FOR EVALUATORS?

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The usual players in the 'evaluation game' could be listed by role as below. I think this list is a bit more extensive than any I've seen before but if you think of something I've missed, please tell me (mjscriv1@gmail.com) or write a response for our comments department at jmde.com. To this cast of characters I'm going to add one more role, which I'll call the Evaluation Advisor, defined below. People have served in this role, but I do not know of any discussion of it, especially the particular version of it described here and called 'Free EA.'

1. Client
2. Evaluator
3. Program staff
4. Targeted population
5. Impacted population (concurrent, future, and potential)
6. Stakeholders (other than 1-5): program-specific donors, indirect donors (e.g., taxpayers), families and friends of 1-5 above, and other personal, political, or intellectual allies/supporters/enemies/reporters/evaluators/-historians/teachers of the program, its approach, or its sponsors, impactees/staff/donors, etc. as listed above.
7. Audiences (intended, actual others (e.g., oversight agent or agency), and future or potential others).

In Buddhist teaching, the path to enlightenment is defined partly in terms of the 'noble eightfold path' and in that spirit of smoothing the path to enlightenment I'm adding:

8. The Evaluation Advisor (EA).

The evaluation advisor role is operationally defined as follows. It is a person who serves as a helper or guide about evaluation, but *not as an evaluator*, for an individual or organization or program that is being or is about to be evaluated, or is considering sponsoring external or internal evaluation of themselves, under a very strict written NDA (non-disclosure agreement). The NDA means that they can discuss, with the prospective evaluatees, the nature and costs and benefits of evaluation of various types, and how to do it or get it done, or survive it or benefit from it, or avoid it, or cheat on it, but cannot discuss anything about that discussion with *anyone* else, including in particular the agency that is funding the evaluatee and wants or requires it to get evaluated. This sounds like what one might normally call a 'critical friend' role, but that term has been used by the empowerment evaluation supporters for the role of their paradigm *evaluator*, which the EA is absolutely *not*; and it's also a little presumptuous, perhaps misleading, because the advice the EA gives may not make them a friend, and they are not a friend to begin with. The advantage of the EA service to the grantees is that they can ask questions of the EA that reveal their ignorance or skepticism about evaluation, their interest in avoiding, or misleading, an evaluation, or their concerns about its cost or disruptive effects, etc., questions that they would not want to ask the funders because of what it would reveal about them or their attitudes.

Perhaps the most interesting aspect of the EA role is that it might be funded by the agency that is funding the grantee's program and requires it to be evaluated. It is this particular version of the EA that I am

encouraging here. Their reasons for doing this could be their wish to improve the quality of the evaluation reports they're getting from their grantees and hence their own decision-making, and to improve the use made of evaluation by those grantees, something that may not be happening under the current arrangement. Support for an EA by a funding agency might be especially useful for small non-profits that simply lack the resources or understanding of evaluation needed to attract an experienced evaluator in an advisor role.

One more requirement; the NDA should, usually, also preclude the EA from actually taking on the job of evaluating the organizations s/he advises. This is to prevent a possible conflict of interest in the EA between giving good advice and selling his/her services. The funding agency may or may not want to allow petitions for an exemption from this requirement in special cases.

Relatedly, the EA, whose services are usually delivered at the grantee's site—travel costs being covered by the funding agency in the case we've just been discussing—or electronically, is restricted in the time that can be spent with any one grantee. The limit might be half a day or a day, perhaps with one follow-up—strict enough to prevent the EA from actually doing the evaluation, since part of the purpose here is to get the evaluatee to do some reflection about how to do it, before commissioning it and undergoing it, including selecting an evaluator. That restriction also keeps down the cost of the EA experiment or service to the funders.

Three other considerations need to be addressed. First, the EA's work should be evaluated by the grantee, and, in one case just discussed, this evaluation should be passed back to the funding agency to help them decide if the EA approach, or this EA, is worth the cost. (This feedback might be just encouraged, or required.) Second, after the EA has done a good many of these service efforts, s/he can report back to the funding agency any general or particular observations, provided that it is totally impossible to use these reports as premises for conclusions about any individual grantee. (Note that this means it is a violation of the NDA to make any claims about the EA's findings that begin with the words 'All' or 'None'.) Third, an EA may obviously be hired by any organization to provide exactly the services described, to themselves, under the same NDA but without feedback to any funding agency, or the prohibition on the EA actually doing the evaluation. This has been done, although it hardly qualifies as a common practice, and I think we can increase EA use by encouraging funders to consider paying the bill for it. The 'free EA system' defined as above can further the cause of improving evaluation, and its practice, and grantee achievements, in several ways, and no doubt it can be improved by the suggestions of those reading this.

The evaluation advisor role seems to me to embody some essential elements in professional services that we all expect but that have not been consistently available in our domain. Think of your family physician; he or she is of course an evaluator in a specialized field, and works under an NDA, and gives reasons for referring you to specialists in much the way the EA would. Another way of looking at the EA proposal is to see it as splitting off the critical friend role from the evaluator role. In medicine, this has a precedent—the President of the USA has an official medical advisor, who is not just one of his doctors.¹

An interesting possibility in a few cases is that an EA might be able to take an intern along, probably only after a prior solo visit. It would be a great way to give someone aiming to do professional evaluation

¹ Could not an empowerment evaluator—after all, they are often called an evaluation guide or coach as well as critical friend—be classified as an EA? An EA would probably argue that the credibility and perhaps even the validity of a self-evaluation, especially if done by beginners, is likely to be unacceptable to funding agencies/donors/oversight agencies.

some experience with the variety of situations and types of client they might have.

Since I think we in evaluation need more help in disseminating information about evaluation and the benefits it can yield, and I think the EA model can help in a small way with this, I hope that experienced evaluators who are able to give a fair treatment of multiple alternative approaches to evaluation will consider offering to do a little pro bono EA work for local or national foundations, or projects, that they have worked for, or otherwise know and approve. I have offered to do this for the Marin Community Foundation, who are quite keen about the idea. I will report here if any of my experiences in the EA role in the next few months prove to be of general interest *but* without including any conclusions about the merit of either the MCF or any of its two hundred or so grantees that I work with. I am sure that I will learn from this experience, and I think that MCF and the grantees may also do so. If it works well for all parties, I hope other agencies will fund EA work, and thus create a new kind of task for evaluators, a role mix of teacher, trouble-shooter, and tech support, that may be useful for some organizational customers, and attractive for some evaluators. [2011-06-03; 1452 words]