**Handout for AEA2013 session 928**

**(Handout materials for presentations by Williams, Stake, and Stufflebeam will add others if they come in time)**

Contact David\_Williams@BYU.edu for a more detailed copy of his presentation and/or to discuss participating in the project as one of the participants in his case studies of evaluators.

*From David Williams’ presentation:*

**Rationale**- Evaluation theorists (Fitzpatrick, 2013; Schwandt, 2003; Scriven, 1999; Stake, 2013) have suggested that evaluators should study how people evaluate, formally and informally in daily life, to better understand and either build on these practices or use what we are learning to encourage better practices.

**Purpose-** This presentation focuses on how seven influential evaluators have been learning-to-evaluate, how their personal experiences have helped shape the field of evaluation, and how others may use similar reflective practice to enhance their own evaluation experiences.

**Method-** Sampling began with people who are among the earliest pioneers of the field of educational evaluation who were able and willing to participate. Plans are evolving to include many more people who continue to influence the field from all generations, geographical locations, specializations, etc. The approach has been hermeneutic dialectic narrative case studies, based on work by Heidegger (1962), (Clandinin & Connelly, 2000) and Stake (1995, 2006) and holding to standards proposed by Lincoln & Guba, (1985).

**Assumptions-**

*Agency-* I have conducted these case studies assuming the participants are responsible for their evaluative choices toward social benefits; and their evaluation life experiences reflect many such choices made throughout their lives. Yanchar (2011) elaborates this view while defining it as participational agency.

*Values & Methods-* I assume that evaluation is a human agentive activity that involves participants’ values and informal valuing skills, along with ability to use inquiry methods to carry out or participate in formal evaluations of people, products, programs, etc.

*Informal & Formal-* I recognize that we participate in both informal and formal evaluations as part of our evaluation life experiences. The absence of a client makes an evaluation more informal. The vast majority of evaluations we conduct are informal to a greater or lesser degree.

*Learn Through Experience-* One way we learn to evaluate better is through evaluation experiences, especially when we reflect appropriately on our experiences and take responsibility for our evaluations. Yanchar and Spackman (2012) and Yanchar, Spackman, and Faulconer (2013) elaborate the bases for this assumption.

*We Use Evaluation to Learn-* We evaluate our need to learn, alternative ways to address that need, progress we are making in fulfilling that need, adequacy of what we learn in terms of meeting the need, and we continue through this cycle repeatedly throughout life.

*Transferability Facilitation Before Theory Building-* As Yanchar and Faulconer (2011) argue, understanding others’ experiences allows readers to identify principles they may want to use or avoid. This entails learning from others’ experiences rather than waiting for theory generation and testing or relying on proving “what works” for everyone.

*Inquiry Methods Should Fit Assumptions-* Hermeneutic dialectic, narrative, and case study methods are compatible with the assumptions listed above.

**Results**

Below are some examples of panelists’ experiences learning-to-evaluate, taken from the case studies.

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| **Participant** | **Informal Evaluation Situation** | **Lessons Learned about Evaluation** | **Influence on Formal Evaluation Approach** |
| Daniel Stufflebeam | While substitute teaching he noted problems & possible solutions. | Realized more people needed to know how bad things were across the school district to identify solutions. | Later influenced him to include context evaluation— assessments of needs, problems, assets, & opportunities—into his CIPP Model evaluation approach and evaluation studies. |
| Michael Scriven | Read and critiqued Consumer Reports since college and wrote a formal critique of it as a philosophy professor, which CR rejected; but he kept his subscription. | Thought about what Consumer Reports did well and poorly, including how their directors responded to his critiques (rejected them at first) compared to how program evaluation theorists responded to his critiques of them (welcomed his insights). | Has increasingly pushed for participants in all kinds of evaluation to recognize their biases and the mistake of social science’s value-free doctrine. Asks for and expects reality checks on his own learning from others and invites others to seek for feedback from multiple perspectives too, by refining their understanding of evaluation to the alpha and trans-discipline he believes it to be. |
| Robert Stake | In a NSF project on curriculum development he found clients didn’t value the psycho-metrics data he offered. | Comments by colleagues led him to think developers needed to listen better to clients regarding their values, concerns, and needs. | He shifted through his Countenance and Responsive evaluation papers and practices to an approach that identifies and responds to clients’ values using whatever methods are most appropriate for their circumstances. |
| Eleanor Chelimsky | Musical training and concertizing as a classical pianist in early years taught her key ways to evaluate in the piano performance world. | Developed a tendency to think more synthetically than analytically in reaching evaluative judgments and emphasized the conceptual inclusion of the audience as an integral part of evaluative performance. | Constantly added to her view of what needed to be considered in an evaluation design. For example, doing a synthesis of all prior evaluation findings and evaluator experience in a given field; a review of past history and known political problems explicit or implicit in the evaluation question; a look at all stakeholder positions; an assessment of potential system effects or spillover into other subject areas; and including synthesizers as team members. |
| Ernest R. House | He learned to be skeptical of all evaluations through several experiences as a child/youth in which adults’ evaluations proved inadequate. | At an early age, he responded by looking suspiciously beneath the surface of people and events. This eventually evolved into an intellectual style that worked well for him. | Over time, this style became useful in formal evaluation. Often, he found he could see what others did not see, and would say what others would not say. He pushed willful ignorance back, farther than most people can tolerate, particularly in high-profile evaluations, in spite of pressures to the contrary. |
| Marv Alkin | Experiences studying and teaching math and counseling students in high school clarified contrasting values as important. | He developed systematic, logical thinking but also realized the importance of dealing with others in understanding ways. | Combined these principles little by little into his approach to evaluation when opportunities to learn and teach about and do program evaluation arose. |
| Michael Q. Patton | Transitioned from being a youth leader of a high school evangelical group to studying humanistic values in college and shifting his own values. | Wanting to complete his church mission in spite of losing his faith; so he searched for ways to help others sort through their values without emphasizing his own shifted values. | Developmental evaluation is coming to be about helping clients identify guiding ethical principles and listening to others rather than creating and testing best practices generated by fallible scientific methods. Searching for ways to help evaluators and their stakeholders seek guidance to human action rather than prescriptive best practices. |

**Conclusions-**

Each learning-to-evaluate journey is unique.

However, there are some commonalities as well.

• Literature on intuitive judgment (Gilovich, Griffin, & Kahneman, 2002) suggests people sometimes make rational and informed informal judgments but often are biased and make poor evaluations as well. But as they become expert in an area, they can improve and can make good evaluations in that area very quickly (Kahneman, 2011).

• The case studies of the seven panelists, and many other case studies I’m in the process of conducting, elaborate on these findings. They show how these evaluators have learned through experience to draw elements from their informal evaluation experiences and infuse them into their formal evaluation approaches. They are mostly confident that their approaches are useful for their clients and for our field.

• These results suggest that as agents, we spend our lives learning to evaluate.

• Through making choices and dealing with the consequences, we may learn what we value most and how to use those values to make other choices.

• Through these experiences, we refine our human agency stewardship so we are enabled to make better and better evaluations (at least in some areas of our lives) and become better agents as we become better evaluators. We LEARNED to evaluate and hopefully, we’ll continue that learning into the future.

Key principles I have learned from these cases that support and elaborate these conclusions about life-long learning to evaluate are:

• Although humans make many mistakes in evaluating informally and formally, we can and often do learn from our mistakes and failures as well as our successes.

• We have an innate ability to choose between options and are not completely determined by our parentage, culture, genetics, etc. Choice is vital for evaluation. Humans learn to choose by learning from evaluation experiences/lives.

• We are attracted to some options more than others, perhaps intuitively, rationally, and/or according to our personality or through a combination of our genetics, parenting, culture, etc.

• We use various combinations of rationality and intuition constantly in making our evaluations.

• We learn through billions of evaluation experiences in our day-to-day living to discern which evaluation choices we want to pursue in the future and which we want to avoid.

• This learning involves improved knowing, doing and becoming better evaluators. Sometimes we call this accumulation of learning, wisdom.

• We also use evaluation to enhance our learning of everything we learn, including how to know if we should do a formal or informal evaluation, what our evaluation approach options are, how to do better evaluations, and how to be better evaluators.

• Formal evaluation approaches are examples of how a few people have formalized their informal evaluation learning experiences to share them with others.

• Sometimes evaluators consider using the experiences of others to enhance their own evaluation expertise.

• Some students of evaluation have thought these formal approaches to evaluation represent or are built on laws learned through theory building (descriptive and/or prescriptive). Perhaps some of them are.

• But if we view them instead as accumulated wisdom of others who are learning to become experts through analysis of their own and others’ evaluation life experiences, perhaps we will see ways to help ourselves and our clients accumulate similar wisdom in our evaluation life evolution.

• If we could do that, perhaps scholars of literature on informal evaluation will be invited to pay more attention to the trans-discipline of evaluation in all our lives.

**So what for you and the future?**

You might be asking what all this has to do with you? In some ways, my response is simply that we should learn from history rather than repeat it.

I have also learned from this study that understanding my own evaluation life journey from childhood to now and projecting that life into the future helps me clarify the values and evaluation activities I engage in informally and formally. I realize that how I understand evaluation, how I practice it, and who I am becoming as an evaluator is much more central to how I treat other stakeholders, audiences, co-participants (basically all other people) and how I serve them, than any of the methods I’ve learned and use.

As a professional musician and choir director/teacher told me about his evaluation life, (paraphrasing) I’m still learning to listen for quality and always will be, because my understanding of quality is continually growing.

So, I invite you to examine your values, how you have learned them, if you are still learning about them, and how to use them better to evaluate in your informal evaluation life as well as your professional and formal evaluation life.

If you would like to involve me and this project in your effort, please email me about participating in our study. But also consider interacting with your evaluation teams and stakeholders/clients/audiences) you collaborate with in ways that will invite them and you to do this kind of reflection often and continually. Then share what you learn with your students and the rest of us so we can all learn to know, do and be better evaluating human agents.

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*From Bob Stake’s presentation-*

**Personal Beliefs, Professional Standards**

1. True merit, like beauty, lies in the eyes of beholders, constructed, subjective, *not best known, objectified*.

2. *Overt expressions* of goals, values and need are always incomplete and often misrepresentative.

3. *Expressed criteria* of quality are often uncorrelated with unspoken criteria.

4. The value of something, such as charity or an education, is often *more in having it* than in its impact.

5. Quality *found locally* is seldom generalizable, but can contribute to general understanding.

*From Dan Stufflebeam’s presentation-*

**Analysis of Factors that Influenced Dan Stufflebeam’s Still Evolving Concept of Evaluation**

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| **Influential Factors** | **Areas of Influence** | **Examples of Influence** | **Manifestation in One’s Evaluation Approach** |
| **Family Background** | -Close-knit, intact family | -Strong work ethic & abiding commitment to help each other | -Should conduct evaluations collaboratively deliver on commitments |
| -Church-based activities (usually, 6 days a week) | -For example, learning to debate issues & dilemmas in everyday life based on passages of scripture  -As another example, gaining experience in grounding personal judgments on biblical commandments & other lessons | -Provided a perspective for working out, defending, & applying fundamental beliefs about sound evaluation  -Provided an example & pointed up the need to define & employ standards to judge an evaluation’s strengths & weaknesses |
| -Small Iowa town | -Neighbors helping neighbors | -Stakeholder engagement is needed & useful for getting sound evaluations done & applied |
| -Experiencing circumstances of poverty due to growing up in the wake of the Great Depression | -Never forget the worst of where you came from & that others may be in similar circumstances | -Assure evaluations are equitable in addressing the needs of the full range of a program’s stakeholders, especially the poor & disadvantaged |
| The blessing of living in the U.S.A. | -Appreciation for citizenship in a free society & learning early the precepts of democracy & the rule of law | -Strong orientation in the Joint Committee standards to the U.S. Constitution, including especially its Bill of Rights |
| **Education** | -Teaching in an Iowa rural school district | -Teachers need to be skilled in professionally addressing a host of student needs that far exceed curriculum content & teaching methods | -Influenced me to pursue graduate studies in counseling & clinical psychology & incorporate clinical/qualitative assessment into my evaluation approach |
| -Substitute teaching in over 40 inner-city Chicago schools | -Perceived I might be the only person in Chicago who knew how bad things were across the city’s school district | -Influenced me to include context evaluation— assessments of needs, problems, assets, & opportunities—into my CIPP Model evaluation approach |
| -Graduate school at Loyola U. | -Learned of the applicability of Thomistic philosophy to problems in administering Chicago high schools | -Helped me work out my objectivist orientation to evaluation |
| -Graduate school at Purdue U. | -Majored in both clinical & objective measurement  -Developed a special interest in Organismic Psychology | -Led me, from the outset of my evaluation career to include qualitative as well as quantitative assessments in my evaluations  -While living in an idyllic, Columbus, Ohio neighborhood, I saw kids about 5 years older than mine getting into serious trouble with drugs. I concluded that maybe they had it “too good” with all the materials things at their disposal & almost no work responsibilities. Also, like me, their dads were away on business much of the time. I decided my kids needed a healthier environment, with solid work responsibility. Consequently, following the precepts of Organismic Psychology, I moved my family to a farm in Michigan. The move seems to have worked out well, as daughter Tracey owns a bakery, son Kevin is a “big-time” farmer, & son Joe is a rocket scientist. |
| -Developed, led, & taught in interdisciplinary Ph.D. programs at Ohio State & Western Michigan | -Early on, developed an interest in expanding evaluation beyond education  -Became committed to administrators’ key role in initiating, focusing, facilitating, & using results from evaluations | -My publications drew from evaluation experiences in community development, economic development, housing, community programs for youth, railroad administration, education, health care, & the U.S. Marine Corps  -Developed the concept of evaluation-oriented leader, educated such leaders, & encouraged & assisted them to lead in getting evaluations done & used |
| **Cultural & Political Environment** | -War on Poverty accountability requirements, amid the “Golden 60s” | -My Ohio State boss said” Dan, you’re going into the evaluation business;” I then shifted my efforts from developing standardized tests & conducting research on psychometrics to conducting evaluations at local, state, & national levels  -Began my evaluation career by evaluating projects in their formative stages  -Quickly determined that orthodox evaluation methods were unsuited to evaluating projects in their developmental stages | -Crafted my evaluation approach to differentially define & address evaluation needs at different organizational levels  -Posited that evaluation’s purpose should be first to improve & subsequently to prove a program’s merit & worth  -Became circumspect about the appropriateness & utility of standardized tests, comparative experiments, & objectives-based outcome assessments for evaluating projects in their formative stages, especially ones aimed at helping the disadvantaged |
| -Late 70s & early 80s downturn in the U.S. economy | -Evaluations needed to be frugal & conducted only if the findings would be used for important purposes | -Added feasibility standards—including cost-effectiveness—to my developing ideas about professional standards for guiding & judging evaluations |
| -Society moved gradually to extend accountability requirements beyond education to other disciplines | -Needed to seek methods & approaches beyond those suited to evaluating students’ school achievement  -Needed to train evaluators for work in a wide range of disciplines | -Oriented my evaluation approach to employing a wide range of inquiry methods, including resident & traveling observers, advocacy teams studies, archival analyses, review panels, focus groups, checklists, photography, goal-free evaluations, & others  -Designed Western Michigan’s one-of-a-kind Interdisciplinary Ph.D. Program in Evaluation, which brings together students & professors from Engineering, Nursing, Sociology, Economics, Political Science, Public Administration, Business, Anthropology, other areas—as well as Education; also enrolls students from a wide range of countries |
| **A Sample of Key Evaluation Experiences** | -In the late-60s, led evaluation work in Columbus, Ohio & a number of other school districts while also heading evaluation of the ESEA Titles ! & III programs in DC | -Learned that the objectives-based, & standardized testing, & experimental design approaches were poorly suited to evaluating dynamic, innovative programs in urban as well as suburban & rural school districts  -Helped a number of school districts & other organizations set up fully functional offices of evaluation | -Developed & applied the Context, Input, Process, Product (CIPP) Evaluation Model  -Began advising organizations to institutionalize processes of systematic evaluation & to train local teachers or other personnel to staff such offices |
| -In 1974, evaluated--with Ernest House & Wendell Rivers—the nation’s first state educational accountability system (in Michigan) | -Learned first-hand that evaluations can be intensely political  -Validated the importance of negotiating advance contractual agreements to protect an evaluation’s integrity & viability | -In 1981,included a Political Viability standard in the Joint Committee Program Evaluation Standards &, over the years, interjected certain methods into evaluations to help assure their political viability, e.g., contracts, stakeholder review panels, external metaevaluations, & grounding in the joint Committee *Program Evaluation Standards*  -Developed a checklist to guide the negotiation of sound evaluation contracts |
| -In 1975, organized the Joint Committee on Standards for Educational Evaluation & led development of the Program Evaluation Standards | -Ultimately agreed with Egon Guba & George Madaus that standards should be set by a coalition of evaluation users & evaluation specialists  - Obtained agreement from the Joint Committee that the standards should be divided into categories of utility, feasibility, propriety, & accuracy. | -Joint Committee continues to have equal numbers of members from evaluation user groups & evaluation specialist groups  -Ultimately determined—upon advice from Lee Cronbach—that the utility standards should be accorded first priority when deciding whether to conduct an evaluation |
| -In the winter of 1977, with James Sanders conducted for NSF an evaluation of Columbus, Ohio’s School Without Schools project, designed to cope with that city’s severe, 1977 shortage of natural gas needed to heat schools & other facilities | -Learned first-hand, that an evaluation plan involving a preset, detailed list of questions & preset data collection protocols & procedures can be greatly inferior to a flexible, evolving case study approach employing such exploratory procedures as snowball sampling, an interactive “grapevine search” for issues & evidence,” & successive engagement of informants to raise new questions & identify further interviewees & data sources | -In updating the CIPP Model, provided for initial structuring of evaluation goals, plans, budgets, & contracts to get an evaluation started; but also provided for building in sufficient flexibility to allow, as relevant, for employing an evolving, interactive, exploratory, responsive approach to focusing & refocusing the evaluation, identifying information sources, & obtaining relevant information |
| -Conducted evaluations in a number of foreign countries, including Australia, Colombia, Ecuador, Ireland, Jamaica, Malaysia, Mexico, Poland, Portugal, & the Philippines | -For example, in Malaysia learned first-hand that the Joint Committee’s propriety standards are unacceptable in that culture | -Reinforced the position regarding development & adoption of evaluation standards that groups beyond the Joint Committee’s constituencies should develop their own standards, although they might benefit from learning the process that the U.S./Canada Joint Committee employed to develop its standards |
| -Developed & directed The Evaluation Center at both Ohio State (1963-1973) & Western Michigan (1973-2002) | -Over a period of more than 45 years, the Center has sustained & pursued its mission to advance the theory, practice, & use of evaluation | -Demonstrated that the Center’s advancement of evaluation as a profession is effectively procured through an ongoing program of research, development, dissemination, instruction, & leadership that is grounded in the delivery of evaluation services |
| -In 1991, with Richard Jaeger & Michael Scriven evaluated the procedure employed to set achievement levels on the National Assessment of Educational Progress test results | -Following completion of the contracted formative metaevaluation, my team agreed to the client’s urgent request, motivated by congressional pressure, for an immediate follow-up, summative metaevaluation—before an updated contract could be negotiated. After delivering a quite negative report—later validated by GAO—the client refused to accept & pay for the report & we had no signed contract for use in pursuing payment | -This unfortunate experience underscored the importance of negotiating evaluation contracts before proceeding with an evaluation, especially in highly-charged political environments |
| -In 1992, established & led the federally-funded Center for Research on Educational Accountability & Teacher Evaluation (CREATE) | -Expanded my & other evaluators’ attention beyond program evaluation to that of personnel evaluation  -Identified the need for standards that are tailored to issues in personnel evaluation | -Developed & offered advice for treating personnel evaluation in the context of program evaluations & for the special area of personnel evaluation, per se  -Led the development of the Joint Committee Personnel Evaluation Standards—which focused on utility, feasibility, propriety, & accuracy but included advice & examples uniquely suited to personnel evaluations |
| - In 1996, evaluated the U.S. Marine Corps Performance Review System | -The potentially effective roles of evaluation-oriented leader, as exercised by General George Christmas, & of stakeholder review panels were manifested in this assignment | -Reinforced my commitment to the fundamental importance in evaluation studies of competent, evaluation-oriented leaders & stakeholder review panels |
| **Influential Persons** | -Dr. James Linden, Chairman of Purdue University’s Clinical Psychology Department | -Upon my entry to Purdue U., Dr. Linden arranged for me to test out of most of the Master’s degree courses & instead charted a doctoral program for me, including heavy concentration in quantitative & qualitative measurement & statistics  -He strongly encouraged me to take my first university position in a university with a strong history in measurement & statistics & assisted me to secure a position at The Ohio State University | -Consequently, I have accorded equal importance to quantitative and qualitative methods in my approach to evaluation  -At Ohio State, my entry into the evaluation business was preceded by substantial experience in developing the GED and other standardized tests, by conducting research on psychometrics, & engaging in educational research |
| -Dr. John Ramseyer, Ohio State’s head of education in the 1960s | -When War on Poverty officials found Ohio’s schools unable to meet accountability requirements for federally funded projects, Dr. Ramseyer said “Dan, you are going into the evaluation business & your assignment is to help Ohio’s schools meet federal requirements for evaluation.” | -I established the Evaluation Center, directed a range of school district evaluations, used these to develop an evaluation model for dissemination to school districts, set up masters & Ph.D. programs in evaluation, trained a number of persons who became leaders in the evaluation field, helped several districts set up demonstration offices of evaluation, & applied the lessons learned in Ohio & Michigan schools to the national evaluation of War on Poverty programs based in Washington. |
| -Dr. Egon Guba | -Mentor, colleague, co-author, & close friend | -Was a great collaborator in evaluating the early state of the art in evaluation, arguing that orthodox evaluation methods were inadequate & often counterproductive, pointing the way to approaches that are strong in stakeholder engagement & use of qualitative methods, field testing the CIPP Model, & helping write standards for evaluations. |
| -Dr. Michael Scriven | -In the course of an AERA traveling debate with him, found agreement on many aspects of evaluation, including an objectivist orientation to evaluation, need for formative & summative evaluations, utility of checklists, & importance of metaevaluation  -Also encountered disagreements in certain areas | -CIPP Model has an objectivist orientation, posits needs for both formative & summative evaluations, makes extensive use of checklists, & stresses importance of metaevaluation  -CIPP Model embraces substantial stakeholder engagement, while Scriven favors the evaluator’s distance & independence; CIPP stresses fundamental importance of an improvement orientation versus Scriven’s preference for retrospective, summative evaluations |
| -Dr. Robert Stake | -His Countenance of Evaluation approach & the CIPP Model share a broad view of what should be assessed in an evaluation  -Stake’s & my approaches part ways on how a program should be judged | -The Countenance approach looks at Antecedents, Transactions, & Outcomes, whereas CIPP looks at Context, Inputs, Process, & Products  -Stake calls for a relativist perspective in which essentially there are no correct answers, whereas CIPP works from an objectivist perspective in which there are best answers though these may be difficult or impossible to find |
| -Ms. Christine McGuire | -As president of the National Council on Measurement in Education, in 1975 she assigned me—on behalf of NCME, AERA, & APA—to lead the development of standards for evaluations in education | -This assignment profoundly influenced me to see the importance of standards for guiding & judging evaluations & to greatly value opportunities to collaborate in efforts to advance sound practices of evaluation with professionals from a wide range of disciplines & service areas |
| -Dr. Donald Campbell | -As a member of the Joint Committee on Standards for Educational Evaluation, he wrote the decision-making rule that convinced the Committee’s originally antagonistic education practitioner & evaluation specialist subgroups to collaborate in writing standards | -The CIPP Model requires up-front agreements & follow-through to assure even-handed engagement of an evaluation’s full range of stakeholders throughout the evaluation |
| -Dr. Lee J. Cronbach | -Based on his experience in chairing the committee that developed the original edition of the APA/AERA/NCME Standards for Educational & Psychological Testing, Dr. Cronbach provided me with sage counsel concerning various issues involved in developing the Joint Committee Program Evaluation Standards | -Consistent with his advice, the Joint Committee wrote standards at the level of general principles rather than detailed technical requirements; also, the Committee concurred with Dr. Cronbach that the Utility standards should be listed first so as to convey the message that an evaluation should be undertaken only if there is a strong prospect that its findings would be used. |
| -Dr. Ralph Tyler | -Through conducting evaluations with him, in Detroit & Iowa, I discovered that his concept of evaluation is much richer than the characterizations by many of his disciples & that his evaluation practices were not restricted to assessing outcomes against operational objectives  -Observed that, in conducting an evaluation, Tyler quickly excused himself from meetings with high level officials & administrators & began wandering into classrooms & other areas where the transactions of projects & programs were actually occurring | -Apart from labels of evaluation concepts I found that the CIPP Model is consistent with the way Tyler conducted his evaluations  -Built a strong orientation to collecting process information & interacting with those persons who carry out programs plus those who are recipients of program services |
| -Dr. Nolan Estes | -As Associate Commissioner of the U.S. Office of Education & later as General Superintendent of the Dallas Independent School District, he recruited me to set up & guide evaluation systems in both organizations; moreover, he exerted leadership to assure that evaluations were conducted & that findings were used for decision making | -Estes provided an excellent example of what I came to define as an evaluation-oriented leader & he provided a rich context for me to work in, as I developed & tested the CIPP Model |
| -Dr. William Webster | -Bill Webster headed the evaluation office in the Dallas Independent School District, organized the office to fully implement context, input, process, and product evaluations, collaborated with me to run a school district-based master’s degree program in evaluation, & engaged the program’s graduates to staff the Dallas school district office of evaluation | -The work with Bill Webster provided a strong foundation for my development of concepts related to institutionalizing & mainstreaming evaluation, for my ensuing efforts to help many organizations set up & operate institutional evaluation systems, & for validation of the appropriateness of conducting field-based graduate programs in evaluation |
| -Dr. Diane Reinhard—past president of West Virginia U. & Clarion U. | -As my Ohio State doctoral student, she completed her dissertation by conducting 5 case studies of the use of the Advocate Teams Technique to conduct Input Evaluations | -Her case studies of the Advocate Teams Technique & the checklist she developed for applying the technique are still the best available tools for both teaching & applying the technique |
| -Ms. Patti Lyons | -In 1994, as president of the new Consuelo Foundation, Ms. Lyons engaged me to conduct an 8-year evaluation, based on the CIPP Model, of the foundation’s inaugural project—a self-help housing project for Hawaii’s working poor | -Ms. Lyons proved to be an exemplary evaluation-oriented leader, enabling me to enrich my definition of that role; this evaluation also provided an excellent context for developing a unique approach to preparing evaluation reports for differential use by different segments of an evaluation audience (see the report titled *The Spirit of Consuelo* at www.wmich.edu/evalctr) |
| -Mr. Michael Coplen—Senior Evaluator of the Federal Railroad Administration’s Office of R&D | -Michael Coplen & I are collaborating to help FRA’s Office of R&D develop, field test, & install a system of program evaluation, based on the CIPP Model | -To aid this process I have developed and Dr. Coplen & I are applying a checklist for institutionalizing & mainstreaming systematic, program evaluation, based on the CIPP Model |
| -Dr. Guili Zhang—faculty member at Eastern Carolina University | -Dr. Zhang has made an exhaustive study of applications of the CIPP Model across a wide range of disciplines & countries | -After I clear my present set of professional commitments, Dr. Zhang & I plan to co-author a book that reviews and examines past applications of the CIPP Model & also provides principles & procedures for making correct, productive applications of the model |