

Seven Habits of Highly Effective Evaluators

by George F. Grob

At the EERS conference last April (1999), several of us older (I tried other phrases like “experienced,” “mature,” “wiser,” etc. But there’s no getting around it, we’re just getting old.) evaluators were enjoying a mellow reunion. We recalled some fabulous exploits from our youth, marveled that we had survived in the evaluation business, and then slipped into deep philosophical musings, perhaps inspired more by the wine and company than the merit of our insights. Each of us--your President, Jack Molnar; your former President, newsletter writer, employment matchmaker, Board member, and sage Aunt, Joy Quill; and myself--have put in 30 years or so in this profession. We have earned our reveries.

But then, harsh reality intruded. We had to come to grips with the fact that Peter Rossi, our keynote speaker, had just canceled for medical reasons. We needed a keynote speech for lunch the next day. Joy was given the task of finding a speaker. It took her only thirty seconds to con and shame me into doing it. Now I know why she is regarded as such an effective organizer.

The Search for Wisdom

It was Jack who came up with idea for a topic. He suggested that we share with our fellow evaluators our version of Stephen Covey’s “Seven Habits of Highly Effective People.”

We each jotted down the habits that we thought were pivotal in our profession. Remarkably, it didn’t take long, and our lists were nearly identical. Perhaps our choices were just obvious and superficial. But I really think the ideas came so fast and conclusively because we had all gradually internalized these principles over the years and had filed them into a portion of our brains marked “Important.” We were also feeling increasingly compelled to pass along to newcomers the lessons we have learned. (You will too when you grow older. The compulsion is irresistible, arising from profound evolutionary forces.) Hence we were ready to preach to others, should the opportunity arise.

I made one last reality check by discussing these ideas with Bill Moran, another 30 year veteran. He offered a couple of refinements, and we had our list. Here it is.

Seven Habits of Highly Effective Evaluators

- 1. Openness to Ideas**
- 2. Humility**
- 3. Getting to the Point**
- 4. Down to Earth Communication**
- 5. Timeliness**
- 6. Practicality**
- 7. Above All, Facing the Truth**

1. Openness. The best evaluators we know are creative, zestful thinkers. They are always studying new subjects and excitedly discussing ideas from everywhere and everyone. This unboundedness probably gives them the ingredients they use to fashion the solutions and advice that others are willing to pay them for.

2. Humility. This is the sternest of the habits, but it unlocks all the others. Humility is the strength to accept the ideas of others, to discard one's own if they are found lacking, to ignore the demeanor of an advisor--listening to what is said through insults or flattery. It allows one to surrender to someone else's truth, but also to hold firmly to one's own in the face of ridicule or unpopularity. It instructs its possessor which response is appropriate. It begets confidence and freedom.

3. Pointedness. Effective evaluators have the ability to grasp the essence of an inquiry and to share it with others. They can summarize a year's worth of hard fact gathering and analysis in a simple declarative sentence. They can pass the "Mom Test." That test arises after you have just told your mother about your latest report and she says, "We're so proud of you, dear. What does it say?" And you respond, "Well, it says that...." And she understands.

4. Plain Speech. This is the knack of using simple words and phrases without talking down to your audience. Effective evaluators don't use abbreviations or technical jargon. They sense what their audience already knows and pick up the story there. Then they keep it short. People listen to them.

5. Timeliness. Timeliness is not the same as speed. Evaluators are timely if they provide results when needed. Our value to policy makers and managers lies not only in providing them with information, but in providing it to them when they have to make a decision. That means giving them results before the big meeting, before the regulation is issued, before the legislative mark-up session, before the budget is submitted. Evaluators are ALSO speedy.

6. Practicality. Good evaluators provide lots of solutions to problems, not just their own favorite. They don't ignore resource constraints or other barriers beyond the control the client. They get inside their clients shoes. They present solutions in the form of options, all of which are capable of being adopted by the client.

7. Truthfulness. This is the *sine qua non* of evaluation. Nothing matters more. However, it is a quality that is widely misunderstood. The ineffective evaluator bandies the truth about like a weapon, confronting people with it, or claims to be its guardian, protecting it from abuse by the hoi polloi. The highly effective evaluator is simply not afraid to face the truth, and succumbs to it when confronted by it. No matter what, he or she remains objective. A weary evaluator, unable to muster the stamina to be highly effective all the time, can temporarily abandon the other six habits, but not this one.

Accumulating Power

Good habits are also called virtues. The Latin derivative of “virtue” means “power” or “strength.” And, indeed, virtues are powerful. We even speak of doing things by “force of habit.” Habits, once attained, allow one to do things with ease, without even thinking about it--such as driving all the way home from work without realizing it. Once acquired, they last a lifetime--like riding a bike. This is also true of habits of character and professionalism (like truthfulness and plain speech). Hence, the good habits, or virtues, of highly effective evaluators are powerful forces that enable them to easily and consistently perform at a high level.

Fortunately, habits are acquired, not inherited. Everyone can have good habits, including the seven discussed here. The mechanism is simple--constantly repeat the acts of the habit. Someone intent on mastering humility, for example, need only concentrate on listening to others, filtering out the incoming insults and empty praise. Making a point of this, evaluating performance at day's end, and keeping this up for several months will make it automatic.

The best approach is to pick one habit per year and really make a point out of acquiring it. Assuming success and a little back sliding, the evaluator will be a superb performer in less than ten years. Improvement is gradual, so effectiveness will build from the very beginning of the program. And these habits are pivotal ones, dragging other good habits along with them.

The Rewards

“Virtue is its own reward.” they say. I'm not sure. Perhaps it is for those who like to collect virtues. But to me the reward is in what good habits enable us to do. Highly effective evaluators can solve problems and develop recommendations to improve government programs, businesses, foundations, institutions of all sorts, and the people they serve. When their recommendations have been accepted and acted on, evaluators can take pride and enjoyment in the results. No one can take away this reward. Effective evaluators will have this pride until they lose their capacity to remember.

So, these are seven habits well worth acquiring. I don't own them. In fact, I'm still working on them and trying to shed some bad ones (called “vices”). They're there for the taking. Help yourself.