



Evaluation Theory Into Practice

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This presentation is intended to provide assistance for

- **Locating useful evaluation tools**
- **Helping organizations assess and improve their existing evaluation systems**
- **Helping organizations install new evaluation systems**

What I Will Do

- Acquaint you with an Evaluation Checklist website
- Discuss a Checklist on Institutionalizing Evaluation

Evaluation Checklist Site

- Operated by The Evaluation Center
- www.wmich.edu/evalctr
- Includes **23 checklists** and is growing
- Used nationally and internationally
- Used across disciplines
- Gets approximately 1,000 hits a month

Contents of the Checklist Site include

- **Theory of checklists (Scriven)**
- **Practical steps to develop and validate checklists (Stufflebeam)**
- **Checklists on an array of evaluation topics**

The checklists are organized as follows:

- Evaluation Planning (6)
- Metaevaluation (3)
- Institutionalization of Evaluation (1)
- Evaluating Technology Systems (1)
- Developing Evaluation Checklists (1)

Checklists on different evaluation models, include

- **CIPP Model Evaluation Checklist**
- **Deliberative Democratic Evaluation Checklist** by House & Howe
- **Guidelines and Checklist for Constructivist Evaluation** by Guba & Lincoln
- **Key Evaluation Checklist** by Scriven
- **Utilization-Focused Evaluation Checklist** by Patton

Other checklists pertaining to evaluation use include

- Budgeting Checklist
- Contracting checklists
- Feedback Workshop Checklist
- Institutionalization of Evaluation Checklist

INSTITUTIONALIZING EVALUATION CHECKLIST

- Assumes a decision to install or strengthen an evaluation unit
 - Includes 18 Checkpoints
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1. Since evaluation systems are **context dependent**, consider:

- **Local Needs**
- **Values**
- **Laws & policies**
- **Economics**
- **Politics**
- **Organizational aims**
- **Mission**
- **Governance**
- **Administration**
- **Program history**
- **Challenges**

2. Assess & mobilize driving forces for evaluation.

- Evaluation requirements of funded projects
 - Management's needs for evaluation
 - Staff's needs for evaluation
 - Constituent's demands for accountability
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3. House the **evaluation unit** high in the organization, to enhance:

- **Distance from evaluands**
- **Influence on decision making**

4. Acquire stakeholder's support & participation by

- **Keeping policy makers, administrators, staff, and constituents informed**
- **Engaging review panels**

5. Adopt & apply professional standards, to make evaluations

- Useful
- Feasible
- Ethical
- Accurate

6. Ground evaluations in formal rules & agreements, including

- Evaluation policies
- Evaluation contracts
- Memoranda of agreements

7. Address clear, appropriate evaluation purposes, e.g.:

- Improvement
- Accountability
- Organizational learning
- Dissemination

8. Engage a **credible evaluation team**, with needed expertise in:

- **Field research**
- **Group process**
- **Interviewing**
- **Measurement**
- **Statistics**
- **Surveys**
- **Cost analysis**
- **Policy analysis**
- **Public speaking**
- **Clear writing**
- **Editing**
- **Technology**
- **Project management**
- **Etc.**

9. Supply sufficient **resources** for evaluation:

■ **Funds**

■ **Positions**

■ **Facilities**

■ **Equipment**

■ **Services**

■ **Software**

■ **Technical
support**

10. Adopt an appropriate evaluation model (s), e.g.,

- The CIPP Model
- Constructivist Model
- Consumer-oriented Model
- Value-added assessment
- Democratic-Deliberative Model
- Responsive Evaluation
- Utilization-Focused Model

11. Employ multiple methods.

- Advocacy teams
- Case studies
- Checklists
- Cost analysis
- Demographic analysis
- Document analysis
- Focus groups
- Goal-free evaluations
- Hearings
- Interviews
- Literature review
- Meta-analysis
- Observation
- Video records
- Quasi experiments
- Rating scales
- Site visits
- Surveys

12. Regularly conduct evaluations of:

- Programs
- Projects
- Other important evaluands

13. Maintain **databases**, including:

- **Up-to-date program profiles**
- **Computerized information systems**

14. Communicate effectively, using

- 3-in-1 reports
- Feedback workshops
- Reports on a website
- Op-ed Pieces
- Radio
- TV

15. Provide **evaluation education** to evaluators & stakeholders, using

- **Apprenticeships**
- **Courses**
- **Workshops**
- **Institutes**
- **Internships**
- **Evaluation library**
- **Degree programs**
- **Visits to other evaluation units**

16. Operate a quick response evaluation mechanism to

- Address emergency evaluation needs
- Foster communication at all levels
- Provide evaluation training on short notice
- Attend meetings with implications for the evaluation unit

17. Periodically secure internal & external metaevaluations to

- Improve the evaluation system
- Meet accountability requirements
- Demonstrate professionalism
- Embrace reciprocity

18. Maintain an evaluation system review and improvement process, e.g.,

- Periodically update evaluation long range plans.
- Set and address priorities for improvement.
- At staff meetings consider how to improve evaluation services.
- Obtain reviews and advice from external experts.

Wrap-Up

- Institutionalization Checklist is geared to installing, assessing, and maintaining an evaluation unit
- CIPP Checklist is for guiding individual evaluations.

Wrap-Up (continued)

- The WMU checklist site has 23 checklists.
 - They address Evaluation Planning, Metaevaluation, and Institutionalization of Evaluation.
 - Checklists can be used in combination.
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Evaluation Checklists are valuable tools

- They are guides, not rigid sets of rules.
- I hope you (and your clients) will find them useful in planning, conducting, and using evaluations.
- Again, the site is www.wmich.edu/evalctr.