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Start at the end: empowerment evaluation product planning

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Abstract

Framing relatively detailed reports and other products before conducting the evaluation process helps novices who are learning to participate in organizational self-assessment. This article describes steps and provides templates to guide the practice of evaluation product planning as a part of participative and empowerment evaluation processes with community-based organizations (CBOs). The advantages of this approach, based in practice facilitating participative evaluation at multiple CBOs, are reduced resistance to evaluation and clear expectations among various stakeholders in the evaluation process. This contributes to fuller participation and teamwork and more thorough evaluation products.

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This article describes a practice technique called ‘Start at the End’. I discovered this as I worked with a young man I will call Francis, who, as associate director of a grassroots faith-based organization dedicated to helping people overcome persistent poverty, was learning empowerment evaluation for his program. The area community foundation that funded the program sent me as the evaluation coach, and I found myself caught in a clash of organizational cultures. Francis, whose programmatic focus is on matters of the heart and personal relationships with program participants, disdained the foundation’s inquiries about measurable process and outcomes indicators. Francis and the foundation directors had similar goals—they wanted to see participants make progress—but their methods for monitoring and documenting progress were quite different.

Using an empowerment evaluation process could meet both their needs, but I needed a tool to help Francis overcome his initial resistance to the notion of ‘evaluation’. Together, early in the evaluation planning process, Francis, a foundation representative, and I, along with other stakeholders, developed a prototype for what the evaluation report would say. This concrete tool helped bridge the organizational gap and smoothed the evaluation process by accelerating stakeholder involvement and enhancing participation

My experience with grassroots organizations confirms that the scenario with Francis is not unusual. My colleagues

and I have since used ‘Start at the End’ many times, with consistent benefits, at local nonprofit and public organizations that are engaged in a variety of programs funded by several different sources. I offer this article as a description of the practice and sharing of lessons learned about its application. This process and the tools are intended for use by evaluators and community-based organizational personnel who are building their organizational capacity for evaluation.

The practice, which assumes a participative or empowerment evaluation process is underway, involves stakeholders, as a group, framing relatively detailed reports and other products before the evaluation process is conducted. These ‘boilerplate’ products, called report templates, become the guides for decisions as the planning, implementation, and evaluation of the program proceeds. The templates are different from tables or standardized reporting forms that are sometimes used in program evaluation because they are specifically designed by the stakeholders who plan to use the evaluation results and written with interpretative evaluative comments in mind. In advance of the program delivery and evaluation, stakeholders are encouraged to anticipate the story they hope to tell about the program and begin to write it. The report templates are somewhat flexible and subject to occasional change at the will of the group that makes policy and/or programmatic decisions. This article reviews the assumptions behind the practice, describes the process, offers concrete examples of

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templates, and summarizes my perspectives as an evaluation coach who has used this practice many times.

1. Background and assumptions

Early evaluation product planning is one step in a process that aims to evaluate a particular program while building the organization's capacity to evaluate other programs and policies. The process has multiple outcomes: information for program monitoring and continuous quality improvement, information about results to guide value judgments about the worth of the program, development of knowledge and skills among the stakeholders who use this information, and other outcomes identified by the stakeholders. The stakeholders include program personnel and managers, board members, consumers, funders, and others with a critical interest in the program.

The foundation for this process lies in principles of empowerment evaluation, which aims to 'foster improvement and self-determination' within organizations (Fetterman, Kaftarian, & Wandersman, 1996, p. 4). The principles derive from the long established practice of participatory action research (PAR) (Wadsworth, 1997; Whitmore, 1990; Whyte, 1991), which integrates research into social change processes in ways that help people learn from their own experiences and share them with others. Typically, when empowerment evaluation is used, the goal is to conduct evaluation while also building the organization's capacity for future evaluation and continuous learning (Garvin, 1993; Stevenson, Florin, Mills, & Andrade, 2002; Stockdill, Baizerman, & Compton, 2002; Torres & Preskill, 2001). In human services, empowerment evaluation essentially places the people who provide and receive services as the participants who make critical decisions about the standards of success, program/organizational practices, lessons learned, and what to share with others.

The empowerment evaluation process aims to be democratic, collaborative, and developmental (i.e. goals fit with the developmental stage of the program). Key issues in effective empowerment evaluation center about who participates, to what extent, and in what ways. Inclusion of diverse stakeholders involved in a program increases the likelihood that the evaluation will have meaning and be used. Michael Patton (1997) emphasizes the importance of the stakeholders' engagement in a process of reaction and reflection as the evaluation process yields information. Within an organization that practices systematic and strategic decision making, the communal process of using the evaluation leads to firmer commitment by stakeholders as the organization adapts for the sake of improvement and reduces resistance to change. Empowerment evaluation relies on the core processes of inclusion, strategic decision-making, and reflection.

The principles and ideology of empowerment evaluation are easy to embrace, but the practice of any form of

evaluation tends to be more difficult. Personnel at community-based grass roots organizations rarely have advanced formal training in management or evaluation. In my experience, the impetus for initiating evaluation capacity building has come from the funders. They retain evaluation coaches to work with stakeholder groups using a logical process (see, e.g., Dugan, 1996; EHSNRC, 2002). After organizing the various stakeholders, the coaches help the group to specify the evaluation design and detail the procedures to conduct the evaluation. Together, they develop an evaluation plan that (1) identifies the purpose and design of the evaluation, (2) builds a logic model, (3) establishes a measurement plan and information system for data collection and analysis, and (4) develops a process for use of the evaluation, including report production. A work plan specifies *who* will make evaluative decisions about such matters as intended outcomes, measurement procedures, and data interpretation, report preparation, and when various tasks will occur.

A typical evaluation coaching process proceeds as follows. The community-based organization (CBO) forms a stakeholder team (board, consumer, staff, funder's representative) to oversee the evaluation and meet with the coach. Particular individuals, usually staff, are designated as the primary participants. The teams meet regularly, bi-weekly at first, then monthly to coordinate the overall approach. The consultation begins with an extended orientation to evaluation. Between meetings, the team completes evaluation worksheets, implements evaluation activities, and corresponds with evaluation coaches by phone, fax, and email. Initial coaching efforts focus on demystifying the evaluation process, teaching evaluation basics, and developing an overall plan to support program development, implementation, and evaluation, with the importance of both process and outcome data emphasized. CBO program personnel begin to generate information and use it for program improvement soon after the program starts. Much of the work centers on decision-making prompted by such tools as planning forms, logic models, measurement plan grids, and design of tools for information gathering and reporting. As the evaluation proceeds and data are collected and analyzed, the CBO team meets to interpret the findings. Quarterly, semi-annual, and annual reports are developed. Often, organizations are part of a group of CBOs that receive funding from a common source, and interagency groups are convened quarterly to share lessons learned about evaluation and, eventually, outcomes.

At the community level, few grassroots organizations have developed an organizational culture of accountability and evaluation, although personnel may have participated in training or gathered information on the topic. When they are encouraged to do so by their external funders and given coaches to help them do so, eventually, many groups begin to resist the evaluation process, finding it time-consuming and detracting from the heart of their

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