Attitudes, Experience, & Education on Values and Valuing in Evaluation: Results from a Mixed-Method Study

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RESEARCH ON EVALUATION TIG WEBINAR SERIES
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Hello and Welcome!

Enter in the chat:

Where are you joining us from?

How are you connected to the evaluation field?

Overview

❑ What do I mean by values and valuing?

Overview

❑ What do I mean by values and valuing?

❑ Review Survey Findings

Overview

❑ What do I mean by values and valuing?

❑ Review Survey Findings

❑ Reflect on Survey Findings

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❑ What do I mean by values and valuing?

❑ Review Survey Findings

❑ Reflect on Survey Findings

❑ Review Rapid Review Findings

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❑ What do I mean by values and valuing?

❑ Review Survey Findings

❑ Reflect on Survey Findings

❑ Review Rapid Review Findings

❑ Reflect on a RoE Agenda for Values and Valuing

Today's Purpose

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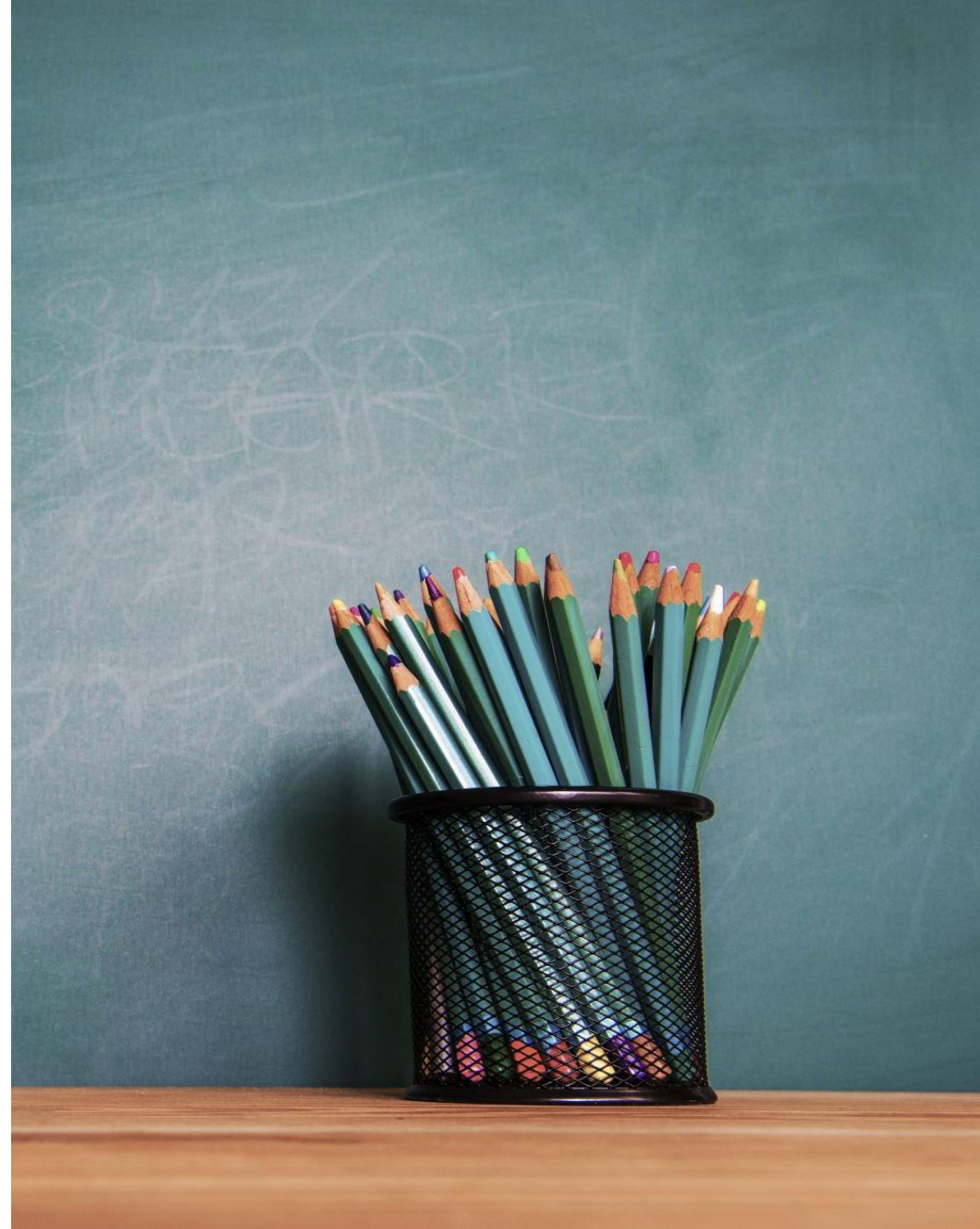
❑ **Reflect.** What do these findings mean to you?

Today's Purpose

❑ **Reflect.** What do these findings mean to you?

❑ **Recognize.** How do values and valuing show up in your work? How could they?

Values and Valuing in Evaluation

Values and Valuing Definitions

Values represent beliefs, attitudes, or principles that guide actions (Schwandt & Gates, 2021; Stufflebeam & Coryn, 2014). Value can also be thought to have both intrinsic (i.e., merit) and extrinsic (i.e., worth) components (Stufflebeam & Coryn, 2014). In the survey, values were defined as beliefs or ideas about what "should be."

Schwandt, T.A., & Gates, E.F. (2021). *Evaluating and valuing in social research*. The Guildford Press.
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Valuing is the enactment, negotiation, and renegotiation of values in making judgments and claims that guide decision-making (Schwandt & Gates, 2021; Stufflebeam & Coryn, 2014). In the survey, valuing was defined as the process of making value judgments.

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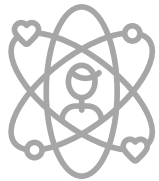
Values and Valuing Definitions
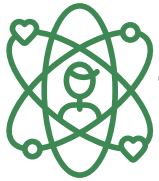
VALUES

- All phases of the evaluation

- Conceptions of a "problem" and interventions designed to address them

- Boundaries of what is included and excluded within an evaluation

-Ontological and epistemological paradigms

- Ethics, professional and personal
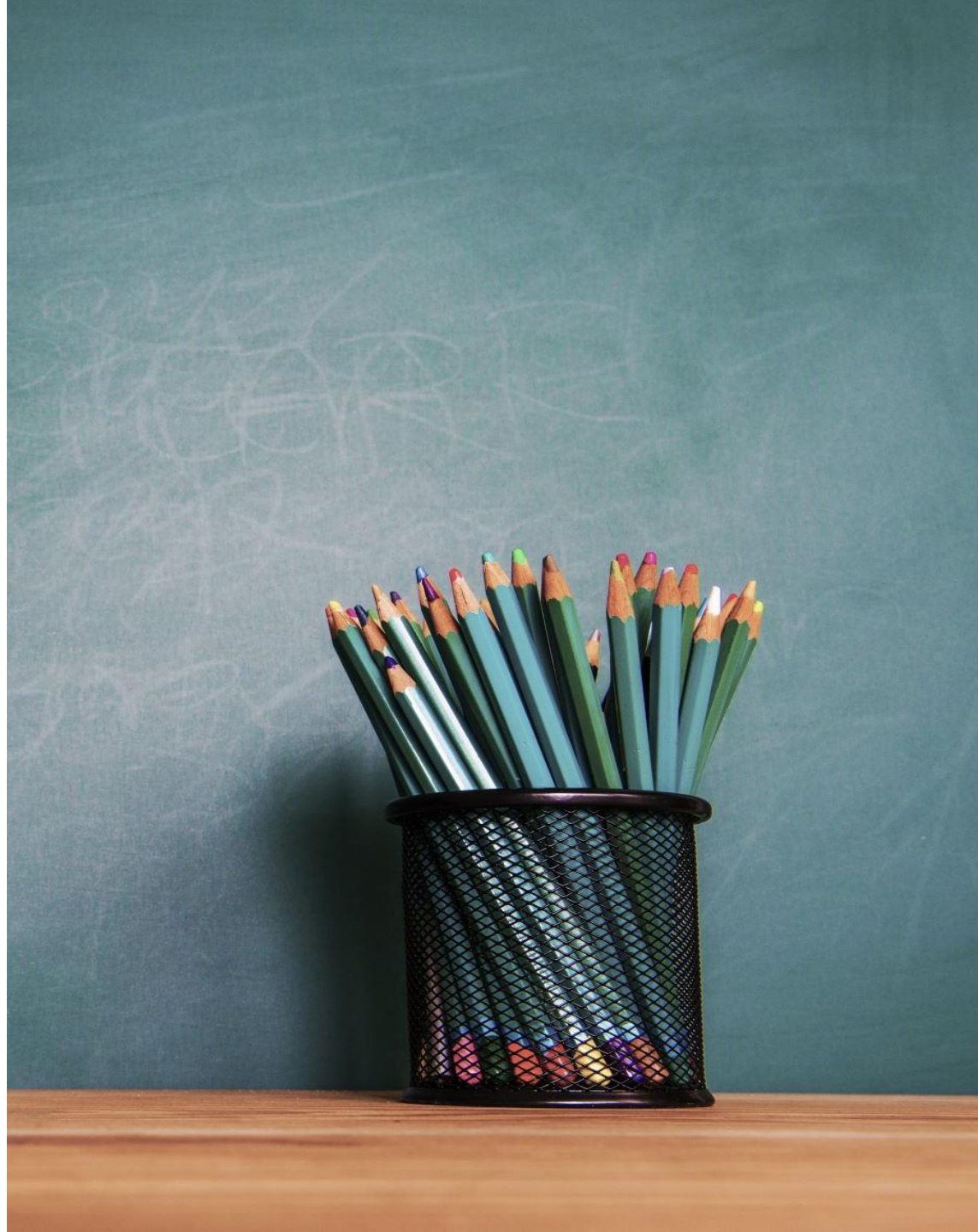
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VALUING

- Criteria and conceptions of success and quality

- Claims and judgments

- Decisions of what should be done next

- Benchmarking and comparisons

- Cost analyses

- Developing value: "Given what we know, and what we can imagine is possible, what should we do now?" (Schwandt & Gates, 2021, p.135)

Survey Overview

Survey Design & Sampling

Cross-sectional design that used a non-probability sampling method.

Anyone who met **both** of the following conditions was eligible to complete the survey: (1) currently living in the USA, and (2) completed a course, workshop, professional training, or other formal learning opportunity on evaluation in the USA.

Survey Design & Sampling

How often do/did you engage in valuing (i.e., make value judgments) as an evaluator? For example, making statements such as 'this program or policy works/does not work well' or 'this program did/did not achieve its goals or outcomes.'

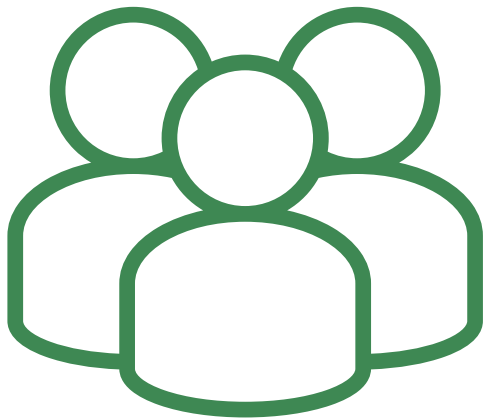Always

Often

Sometimes

Rarely

Never

Back   Next

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Survey Respondents

N= 311

71% Practicing evaluator

47% Lifelong learner of evaluation

30% Support evaluation (e.g., project manager, administrator)

20% Teach evaluation courses, undergrad or grad levels

19% Part or full-time evaluation student

15% Conduct research on evaluation

3% Former evaluator but no longer practice

1% Other

*2/3rds
of respondents
claimed two or more
identities*

Survey Respondents
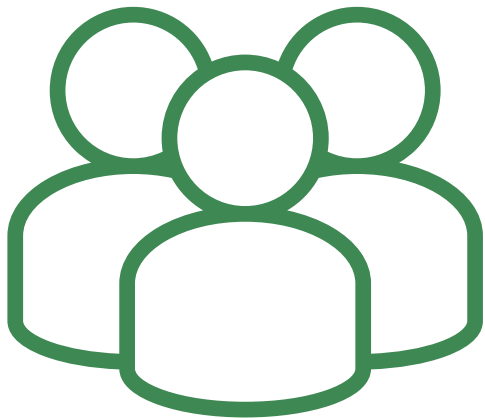
Most respondents were highly educated....

44% held a master's degree
42% held a PhD
14% held a bachelor's degree or less

79% of survey respondents said their program provided opportunities for them to learn about evaluation.

Survey Respondents

Median= 4 educational opportunities

Respondents learned about evaluation in a variety of ways, including:

78% Courses at an educational institution

75% Local/national professional org learning opportunities and/or conferences (e.g., AEA)

69% Open-access resources and webinars

69% Workshop

59% Formal or informal mentorship with an evaluator

41% Professional training program

19% Internship/fellowship at an evaluation organization

9% Evaluation-specific mentorship program

Survey Key Findings
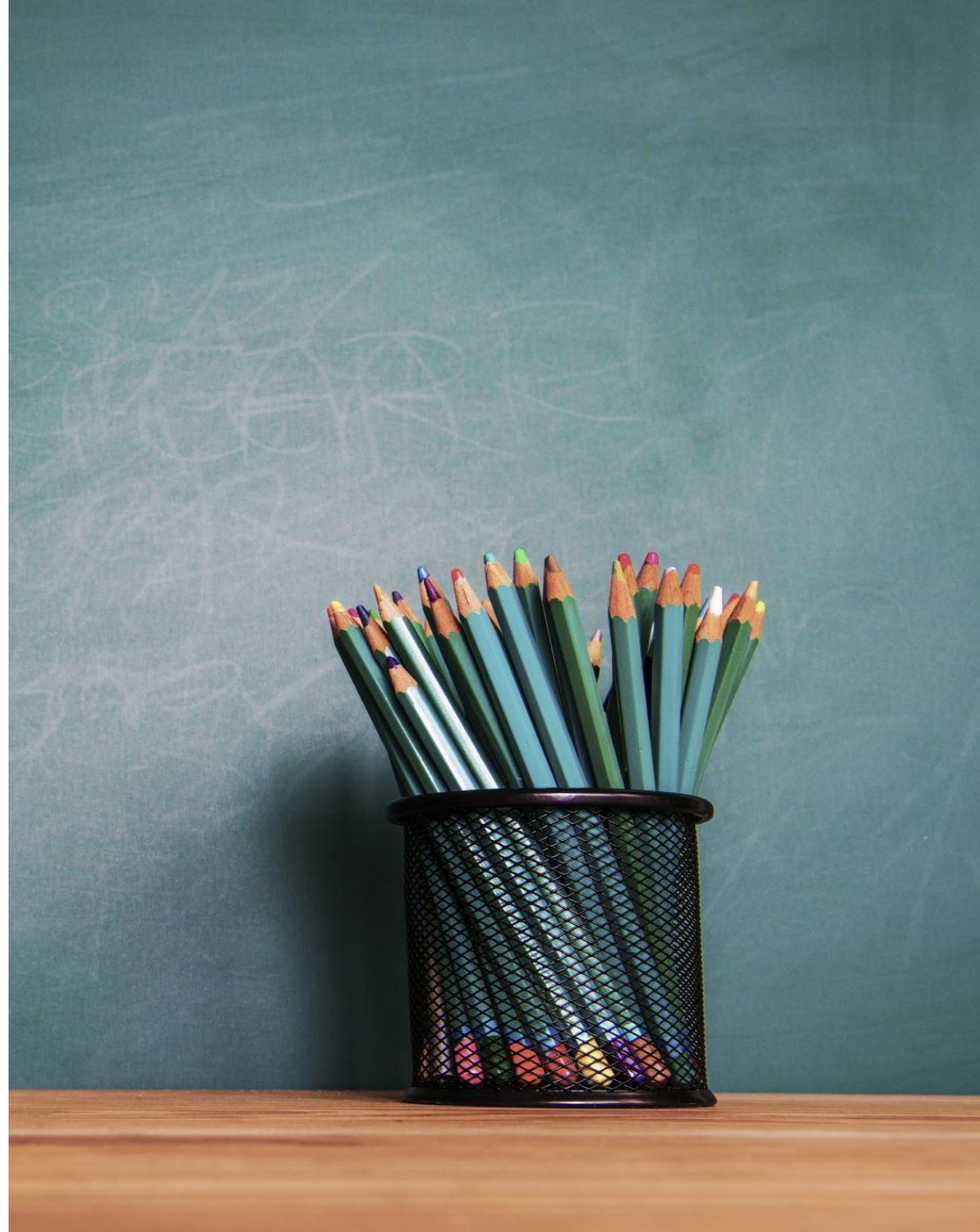
Key Findings Overview

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1. Values and valuing in evaluation are understood by survey respondents as important, field-defining concepts.

2. Evaluation practice is not consistently aligned with attitudes about values and valuing in evaluation.

3. Familiarity with evaluation-specific methods and value frameworks is varied and could likely benefit from additional education.

Key Finding #1: Values and valuing in evaluation are understood by survey respondents as important, field-defining concepts.

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Learn about Values (n=311)

Category	Percentage
Extremely Important	53%
Important	34%
Somewhat Important	8%
Slightly Important	4%
Not at all Important	1%

Learn about Valuing (n=310)

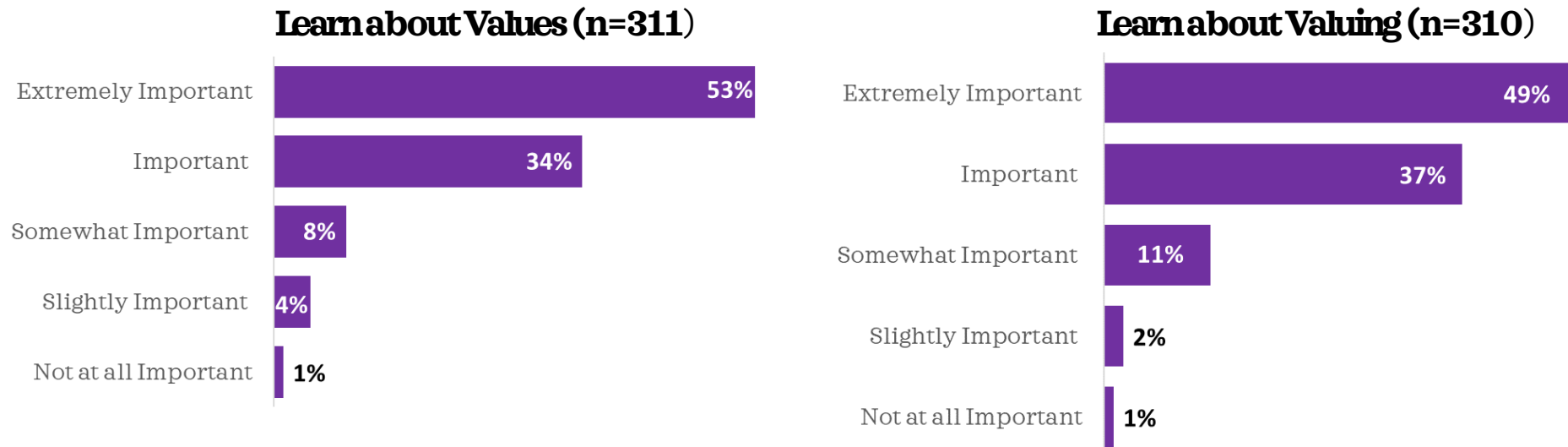| Category	Percentage
Extremely Important	49%
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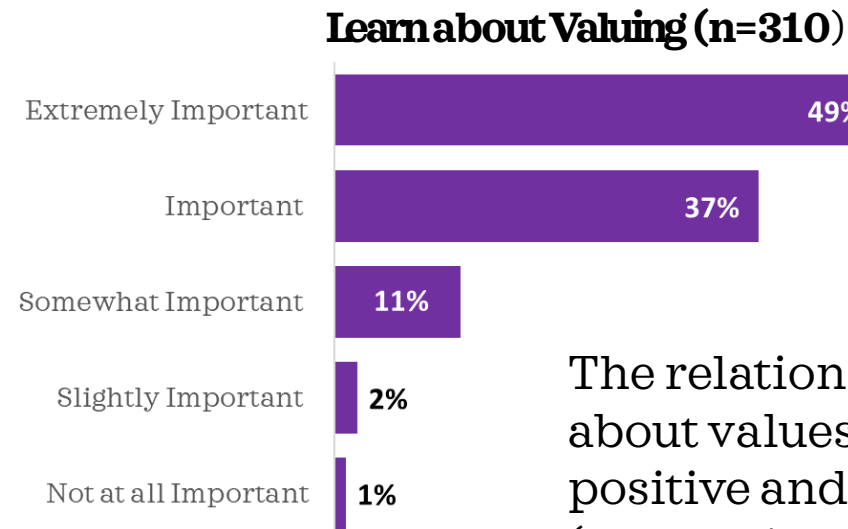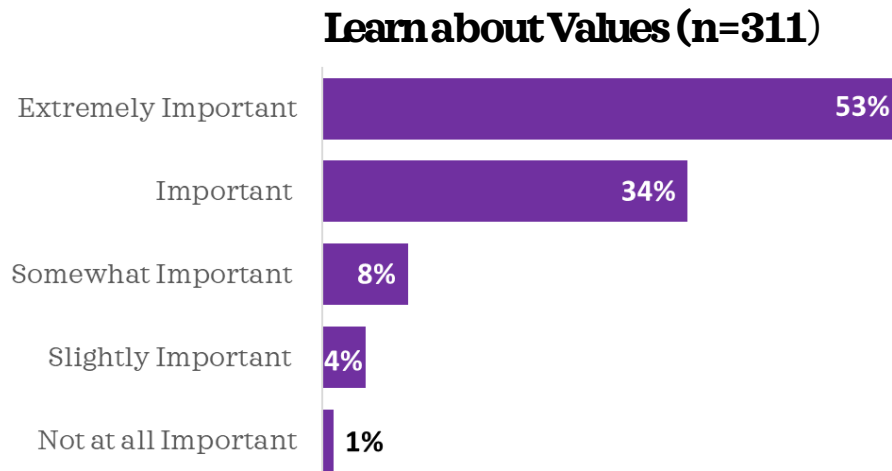
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The relationship between beliefs about values and valuing was positive and statistically significant (Kendall's tau-b= .486, p<.001).

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Values are universal and everywhere/everything (15%)

A sampling of other themes included:

❑ Contributes to social betterment (14%)

❑ Impacts specific aspect of an evaluation (12%)

❑ Impacts relationship between the evaluator and the client (5%)

❑ Evaluation and programs are situated within values (4%)

❑ Other things are important besides values (2%)

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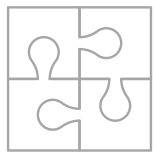Facilitates and forces evaluators to address other components of evaluation (23%)

Confused by the question and how valuing is different from values? (13%)

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A sampling of other themes included:

- ❑ Impacts credibility of evaluations (9%)
- ❑ To control/address bias (7%)
- ❑ Not all evaluations require evaluators to know about valuing (5%)
- ❑ Advances equity/addresses power (4%)
- ❑ Clients request it (2%)
- ❑ Upholds ethics/addresses fairness (2%)
- ❑ Not sufficient education and research on valuing, and there should be (2%)

Key Finding #1: Values and valuing in evaluation are understood by survey respondents as important, field-defining concepts.

Evaluation is the act of determining the merit, worth, or significance of something, such as a program, policy, or product (n=311)
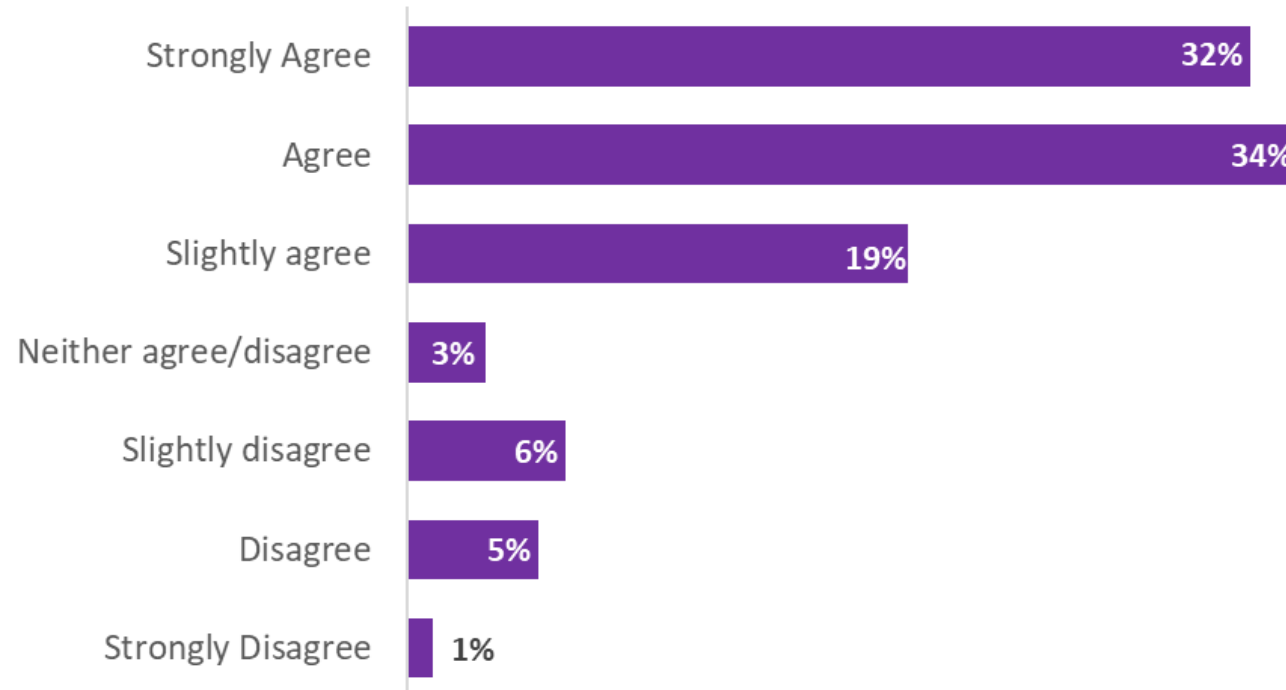
Strongly Agree	32%
Agree	34%
Slightly agree	19%
Neither agree/disagree	3%
Slightly disagree	6%
Disagree	5%
Strongly Disagree	1%

Key Finding #2: Evaluation practice is not consistently aligned with attitudes about values and valuing in evaluation.

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How often do/did you engage in valuing (i.e., make value judgments) as an evaluator? (n=231)

Always (n=47):	20%
Often (n=96):	**42%**
Sometimes (n=68):	29%
Rarely (n=19):	8%
Never (n=1):	<1%

Key Finding #2: Evaluation practice is not consistently aligned with attitudes about values and valuing in evaluation.

How often do/did you have explicit discussions with evaluation clients about their organizational values or values of the program/intervention? (n=231)

32%

37%

23%

5%

3%

■ Always   ■ Often   ■ Sometimes   ■ Rarely   ■ Never

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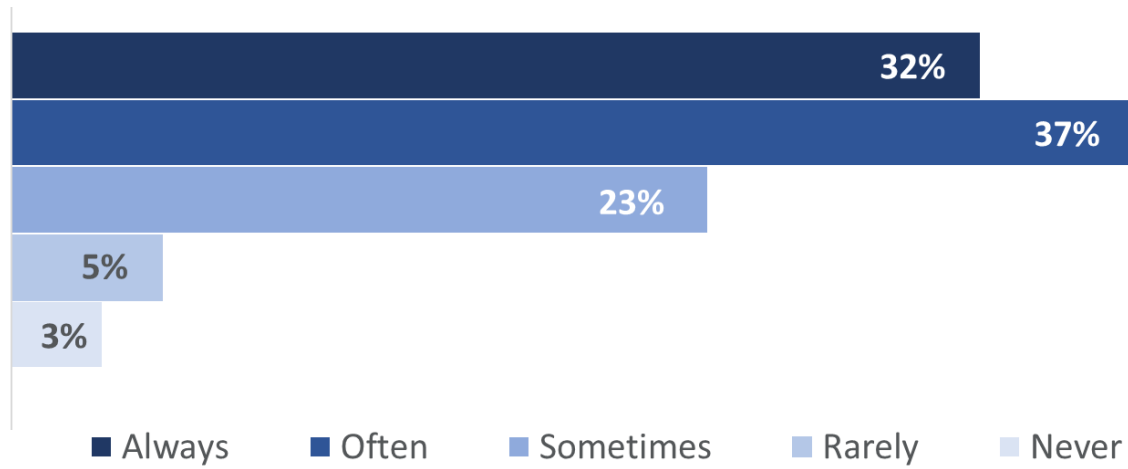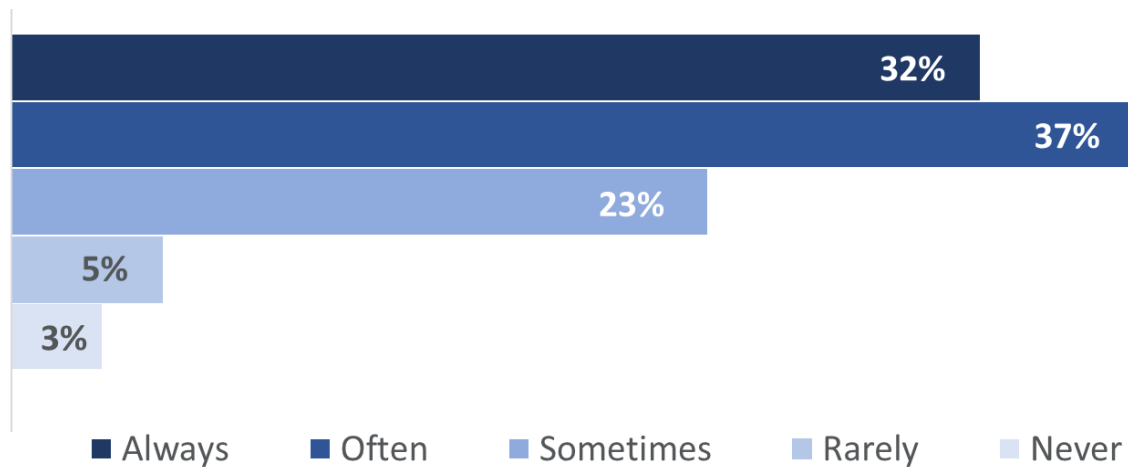How often do/did you have explicit discussions with evaluation clients about their organizational values or values of the program/intervention? (n=231)

■ Always ■ Often ■ Sometimes ■ Rarely ■ Never

Always	32%
Often	37%
Sometimes	23%
Rarely	5%
Never	3%

How often do/did you have explicit discussions with evaluation clients about the values you hold as an evaluator? (n=231)

■ Always ■ Often ■ Sometimes ■ Rarely ■ Never

Always	22%
Often	26%
Sometimes	26%
Rarely	18%
Never	8%

Key Finding #2: Evaluation practice is not consistently aligned with attitudes about values and valuing in evaluation.

Tools used to make value judgments (select all that apply)

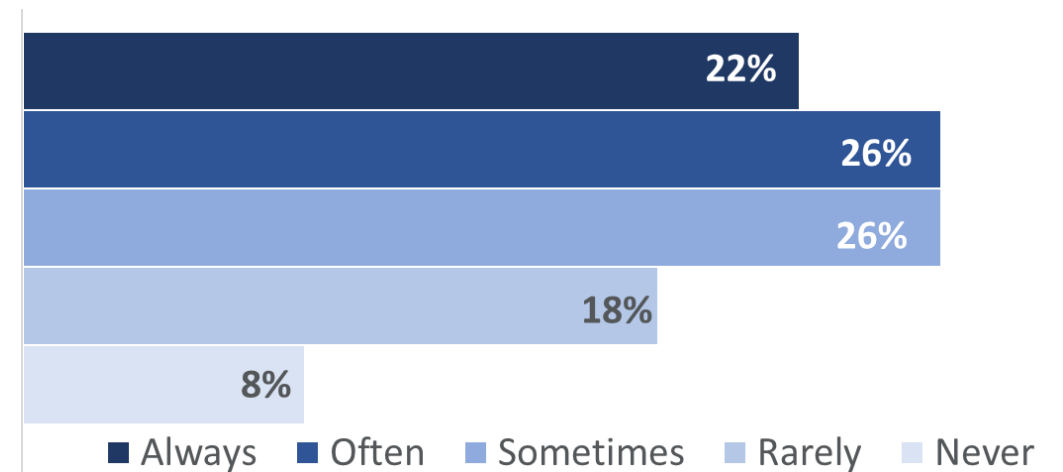|	
Developing and using evaluation criteria and standards	71 %
Specific evaluation approach or theory	63%
Synthesis techniques	42%
Needs assessment(s)	40%
Ethical frameworks and theory (e.g., normative theory)	21%
Other	8%
I did not use any tools or techniques to make value judgments	3%
Cost analyses	3%

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Average of 3 tools used

Median of 3 tools used

Range of 1-7 tools used

Key Finding #3: Familiarity with evaluation-specific methods and value frameworks is varied and could likely benefit from additional education.

	Extremely Familiar	Familiar	Somewhat Familiar	Slightly Familiar	Not at all Familiar
Creating or using evaluation rubrics	40%	39%	10%	8%	3%
Evaluation synthesis techniques	29%	35%	17%	11%	8%
Cost analyses	14%	24%	28%	24%	10%
Descriptive valuing approaches	29%	34%	22%	13%	2%
Prescriptive valuing approaches	19%	31%	24%	15%	11%
Social impact measurement	9%	21%	27%	30%	14%

Key Finding #3: Familiarity with evaluation-specific methods and value frameworks is varied and could likely benefit from additional education.

AEA Guiding Principles (n=311)

Extremely familiar: 35%

Familiar: 38%

Somewhat familiar: 15%

Slightly familiar: 9%

Not at all familiar: 3%

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AEA Guiding Principles
(n=311)

AEA Evaluator Competencies
(n=311)

Extremely familiar: 35%

Extremely familiar: 32%

Familiar: 38%

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Somewhat familiar: 15%

Somewhat familiar: 15%

Slightly familiar: 9%

Slightly familiar: 10%

Not at all familiar: 3%

Not at all familiar: 5%

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AEA Guiding Principles (n=311)	AEA Evaluator Competencies (n=311)	The Program Evaluation Standards by the Joint Committee on Standards for Educational Evaluation (n=311)
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Familiar: 38%	**Familiar: 38%**	**Familiar: 26%**
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Not at all familiar: 3%	Not at all familiar: 5%	Not at all familiar: 21%

27%

30%

52%

Survey Findings Discussion

Key Findings Overview

1. Values and valuing in evaluation are understood by survey respondents as important, field-defining concepts.

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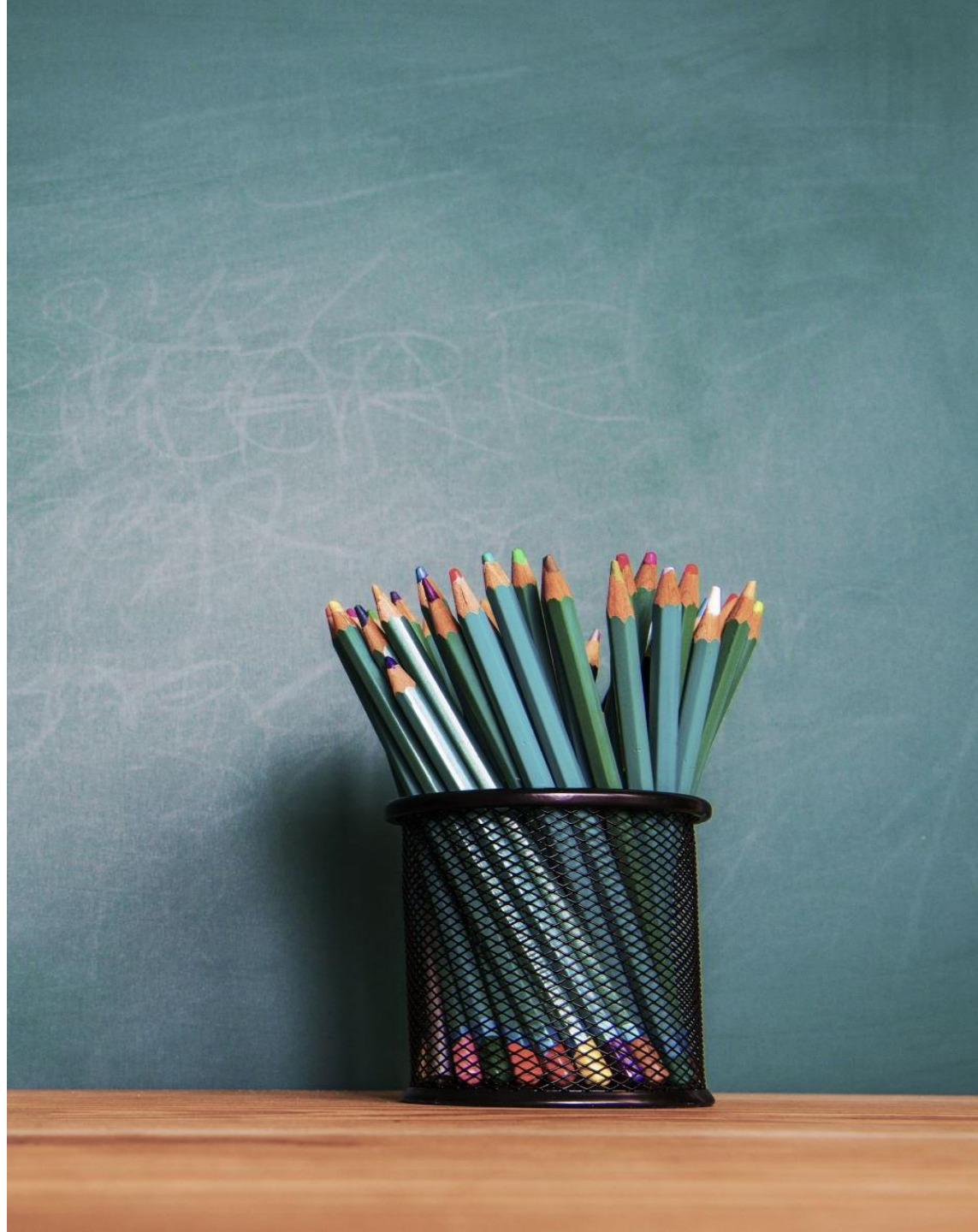
Survey Findings Discussion

1. What are your reactions to hearing these findings and why?

2. How do these findings reflect your own understanding and experiences of values and valuing in evaluation, if at all?

Rapid Review Results

Rapid Review Overview

To what extent are values and valuing discussed in three peer-reviewed, evaluation-specific journals (American Journal of Evaluation, New Directions for Evaluation, and the Journal of Multidisciplinary Evaluation) between 2013 and 2023?

Rapid Review Overview

To what extent are values and valuing discussed in three peer-reviewed, evaluation-specific journals (American Journal of Evaluation, New Directions for Evaluation, and the Journal of Multidisciplinary Evaluation) between 2013 and 2023?

- o What proportion of articles published in three peer-reviewed, evaluation-specific journals between 2013-2023 address values and valuing in evaluation?

- o What types of articles discuss values and valuing in evaluation?

- o What was the focus of articles that discuss values and valuing in evaluation?

Rapid Review Overview

Articles were included IF they....

- Were published in AJE, JMDE, or NDE between 2013-2023

- Met one or both criteria:

   (1) Values and/or valuing in evaluation are explicitly discussed (i.e., defined as describing the role of one or more values, principals, or beliefs in evaluation, the valuing process or analysis, valuing tools or techniques, research on evaluation involving values or valuing in evaluation, or merit/worth in evaluations),

   (2) JCSEE, AEA Evaluator Competencies, and/or AEA Guiding Principles of evaluation are identified by the authors as the focus of the article.

- Were empirical or theoretical/conceptual in nature.

Rapid Review Overview

Two-stage sampling process:

❑ Stage 1 (title/abstract/keywords): 78 articles

❑ Stage 2 (full-text review): 61 articles

   ❑ JMDE: 23
   ❑ AJE: 21
   ❑ NDE: 17

Rapid Review Findings

What proportion of articles published in three peer-reviewed, evaluation-specific journals between 2013-2023 address values and valuing in evaluation?

JMDE	NDE	AJE
16.4%	5.0%	5.4%

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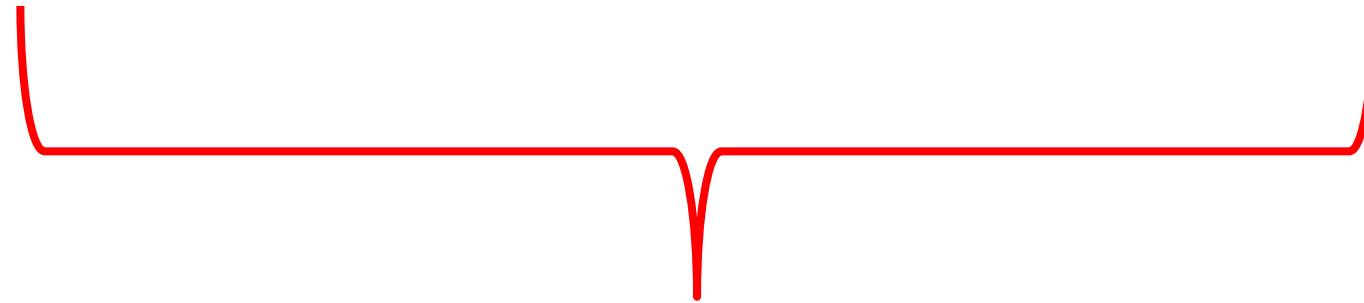
JMDE

16.4%

NDE

5.0%

AJE

5.4%

61 of 872 articles (7.0%)
explicitly addressed values and valuing in evaluation.

Rapid Review Findings

What types of articles discuss values and valuing in evaluation?

Article Types for 61 Articles (Only one type)				
Review	**Theory**	**RoE**	**Methods**	**Evaluation Results**
Articles that utilize an established review process, such as systematic reviews, meta-analyses, meta-evaluations, or literature reviews. The purpose is to examine or summarize existing research and data.	The theoretical discussion of issues within evaluation. Ideas or reasoning may be discussed, or other research cited as part of proposing an idea or theory. These articles do not utilize a systematic research methodology.	Articles presenting research results describing how evaluation is conducted, how evaluations are used, trends in evaluation practices, or the views of evaluators or evaluation consumers on some aspect of evaluation.	These articles present a new research or evaluation methodology, modify an existing methodology, or provide evidence regarding the strengths or weaknesses of a methodology.	Articles presenting results of a program evaluation conducted by the authors.
8 (13%)	28 (46%)	10 (16%)	8 (13%)	7 (12%)

Rapid Review Findings

What was the focus of articles that discuss values and valuing in evaluation?

Focus of Articles (can be multiple categories)			
Evaluation Context	**Evaluation Activities**	**Evaluation Consequences**	**Professional Issues**
Circumstances within which evaluation occurs	The procedures used in planning, carrying out, and disseminating evaluation	Changes that do (or do not) occur as a result of an evaluation	Issues involving the structure, and continuation of the evaluation field
22	44	7	28

Rapid Review Findings

Major Takeaways:

- ✓ Values and valuing occupy less than 20% of articles in major US-based evaluation journals during the past decade.

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✓ A majority of articles on values and valuing discuss these topics/issues theoretically, which doesn't offer much guidance in practical application

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Major Takeaways:

✓ Values and valuing occupy less than 20% of articles in major US-based evaluation journals during the past decade.

✓ A majority of articles on values and valuing discuss these topics/issues theoretically, which doesn't offer much guidance in practical application

✓ Mark's (2008) Subject of Inquiry provides a useful way to looking at articles about values and valuing, but how what alternatives can be developed?

RoE Agenda for Values and Valuing in Evaluation

Survey Findings Discussion

1. How could future RoE continue to build on or expand these findings?

2. In your opinion, why are publications and RoE on values and valuing in evaluation not more prominent?

Thank you!

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