

## AEA's Potential to Serve the Public Good

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I have been thinking about the field of evaluation and the future of AEA, and I finally got it together enough to make sense (I hope) of the notions that have been simmering in the back of my brain. I don't intend what I'm about to say as criticism of something that needs to change. I am by no means sure that it can, or that it should. But I do think the issues deserve airing.

### Diverse, Contending Stakeholders

James Madison saw the United States as a political entity that was suffused with "factions", or as we might say today, "interest groups". Madison did not like factions, but he saw them as inevitable, and saw representative government (rather than direct democracy), as a way to keep any one faction from exerting its will on the entire populace. With a diversity of factions, the balance needed for a stable society, and the public good, would be maintained. He did not think that a single, dominant faction was a good idea. That was true in 1788 and it is true today.

I favor some factions and oppose others. Some that I don't like I can live with. Some, I'd like to abolish. I know of no person who feels otherwise. All of us are working toward furthering some goals and inhibiting others. As these tugs and tussles play out, what makes for maximum benefit to society? (I realize that "maximum benefit to society" is a tangled concept. It conjures difficult topics such as the meaning of the "common good", definitions of successful political compromise, theories of justice, Pareto efficiency, and multi-attribute decision making. But for now I'm content to stick with a common sense, surface understanding of the phrase's meaning.)

### Evaluation, Diverse Stakeholder Groups, and the Need for Honest Brokers

Because I speak as an evaluator, my interest is not so much in the goals that special interests advocate, but in the outcomes of the programs they advocate. The question I have been asking myself is this: How can generating knowledge about program outcome provide "maximum benefit to society"? My answer is that as a field (or a discipline, or a profession, whatever we are), we need to be seen by a diverse set of stakeholders as honest brokers. They must believe that they can turn to us for information. That they can trust us.

When we evaluate a program, the knowledge we generate is introduced into public discourse as part of debates as to what programs should be implemented. If the information we generate is consistently discounted by the same parties because they see evaluation as untrustworthy or biased, then evaluation becomes the tool of a faction, not a process that will pursue the long-term public good by allowing factions to contend with each other. (Madison never saw it this way, but I see it in terms of [joint optimization in complex systems](#).)

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In any single evaluation we must make narrow choices as to who to serve and what positions to support. We cannot escape. It is folly to think that any single evaluation can be “objective and unbiased”. Evaluations can be more, or less, fairly balanced, but “objective and unbiased”? That is an illusion.

But what happens when we shift focus from individual evaluations to the population of evaluations that appear over time and across settings? What happens to the ability of evaluation to meet stakeholder needs? It is certain that the needs of all stakeholders will not be fully met in any single evaluation. The reasons go beyond a simple constraint on resources. The problem is that evaluations in pursuit of different bodies of information may be incompatible. Consider two examples.

Example #1: Imagine a program that is of interest to groups X and Y. Group X has a short term need for some pretty good data to inform a decision that, they hope, will probably be somewhat better than could be made without the evaluation. Group Y needs highly defensible information on the long-term consequences of the program. The difficulty of doing an evaluation that will satisfy both X and Y goes beyond having enough money. It speaks to access to decision makers, intellectual capital within the evaluation team, terms of negotiations with data owners, working agreements with groups touched by the program, and much else besides.

Example #2: X is convinced a program is beneficial. Because of that belief, X does all it can to orient the evaluation to produce positive findings. Y is convinced that the program will have various undesirable consequences. Because of that belief, Y does all it can to assure that data will speak to the undesirable effects. It’s hard to imagine a single evaluation that could fully satisfy both groups. The issues are similar to the ones in the previous example – access to decision makers, intellectual capital, negotiations with data owners, working agreements with groups touched by the program, and so on.

So, if discrete evaluations cannot fully address the needs of all stakeholders, what can evaluation do? The answer is that over time and across settings, it can *jointly optimize* its efforts to provide a variety of stakeholders with useful information. Is evaluation on a path toward actualizing such a joint optimization? I think not.

### **Reinforcing Processes that Drive Evaluation over Time**

What are the collective consequences of multiple evaluations carried out by many evaluators, responding to many customers, under particular business conditions, over time? The answer is an evolutionary process in which evaluation:

- grows supporting structures,
- selectively attracts members,
- develops an intellectual store,
- inclines to a set of values as to the purpose of its work, and
- influences its environment in a direction that nurtures more evaluation work.

Table 1 contains some details of the process that is going on. (Lately I have been thinking a lot about [evolutionary processes that are driving the field of Evaluation](#), and also about [how constructs from evolutionary biology and ecology can be used to build program theory and inform methodology](#).)

<b>Table 1: Reinforcing Processes that are Driving the Evolution of Evaluation</b>	
Expectations	▪ Expectations develops within stakeholders about what evaluators can and cannot do.
Customers hire evaluators	▪ Customers choose who to hire, and those hired do the evaluation they were contacted to do.
Customers continue to hire evaluators	▪ Based on their experience, customers continue to make choices as what evaluation services to buy. This process of hiring and providing information evolves over time. I am not saying that evaluators consciously slant what they do. I am saying there is selection pressure within an ecosystem that moves things in particular directions.
Markets for evaluation develop and draw practitioners	▪ As the market develops for evaluation, there is influence on who is drawn into the field. People who are sympathetic to the enterprise as it is developing will be drawn into the field. People unsympathetic will do something else.
An intellectual infrastructure for evaluation forms	▪ Evaluation activity draws the attention of intellectuals who put effort into serving the knowledge needs of evaluators. This is how we get evaluation theory, methodological advances, and knowledge about how we should conduct ourselves with respect to professional success (promoting evaluation use, etc.)
Thought leaders and thought users influence each other	▪ Our reaction to the intellectuals shapes their behavior. They will tend to produce what we resonate to. They stimulate our thoughts. Our reactions to their work influence their thoughts.
Evaluators shape their environment	▪ Our work shapes beliefs of people outside of our field as to what evaluation can and should do.
Evaluators become their customers	▪ Many of us end up in jobs where we become buyers of evaluation. When we do, we draw on our experience in doing evaluation and interacting with evaluators.
Evaluation develops professional support artifacts	▪ Evaluation develops supporting structures, e.g. journals, educational programs, and professional organizations.

### **What Are the Consequences for Organized Evaluation?**

What path is this evolutionary process taking? What are the implications of treading that path for the willingness of a wide range of stakeholders to see us as honest brokers? Before I go any further, I better put in a disclaimer. I am not arguing against any of the values I'm about to identify. I'm only pointing out that AEA gives those values a high public profile, and that they are values that appeal to many but are either unappealing or off-putting to others.

I can see how outsiders would get the impression that AEA is committed to some value cloud made up of whatever it means to invoke concepts such as "[multiculturalism](#)" and "[identity politics](#)". For sure this is not the only image we present to the outside world. Our website and our public pronouncements richly project the theme of an organization that is committed to the cause of informed decision making

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in the service of the public good. But those proclamations are combined with some highly value-loaded phrases. One example is contained in our Vision and Values. The other is our newsletter.

Here is our statement on Vision and Values. I used **red bold** to highlight the value-loaded phrases I'm referring to.

#### **Preamble**

The American Evaluation Association seeks to act in ways that embody our mission, vision, and values in pursuit of our defined policies and goals.

MISSION: The American Evaluation Association's mission is to improve evaluation practices and methods, increase evaluation use, promote evaluation as a profession, and support the contribution of evaluation to the generation of theory and knowledge about effective human action.

VISION: The American Evaluation Association's vision is to **foster an inclusive, diverse**, and international community of practice positioned as a respected source of information for and about the field of evaluation.

VALUES: The American Evaluation Association values excellence in evaluation practice, utilization of evaluation findings, and **inclusion and diversity in the evaluation community**.

- i. We value high quality, ethically defensible, **culturally responsive evaluation practices** that lead to effective and humane organizations and ultimately to the enhancement of the public good.
- ii. We value high quality, ethically defensible, **culturally responsive evaluation practices** that contribute to decision-making processes, program improvement, and policy formulation.
- iii. We value a global and international evaluation community and understanding of evaluation practices.
- iv. We value the continual development of evaluation professionals and the **development of evaluators from under-represented groups**.
- v. We value **inclusiveness and diversity**, welcoming members at any point in their career, from any context, and representing a range of thought and approaches.
- vi. We value efficient, effective, responsive, transparent, and socially responsible association operations.

I can see how much of this language could be read as embracing any and all perspectives. After all, isn't that what words like "inclusiveness" and "diversity" mean? And as for "under-represented groups", doesn't that take in a very broad range? The difficulty is the difference between the formal definition of the words and their connotations. These words have symbolic value. I can't help but imagine the results of a thought experiment. I draw a random sample of the population of the United States and determine what meaning they think these words have in contemporary society. I'd like to be wrong, but I bet they

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would show strong political and social leanings. And a lot of people in that random sample would not feel comfortable with those leanings.

As for the second example, Table 2 shows headlines in our newsletters for 2019 that reflect the values I highlighted in our values statement.

January	
February	
March	Report on Ma te Rae Evaluation Conference in New Zealand (Indigenous Peoples' conference on evaluation)
April	TIG Spotlight: An Update from the LaRED Topical Interest Group (Latinx Research and Evaluation Discourse (LaRED) Topical Interest Group)
May	Reflecting on Recent Conferences, Upcoming Town Halls and Our Work in Diversity & Inclusion
June	
July	CREA Brings Professional Development Workshops Focused on Culturally Responsive Evaluation to Evaluation 2019
August	Meet the New Minority Serving Institution (MSI) Fellows
September	
October	
Nov	Reflecting on Driving Social Change
December	<ul style="list-style-type: none"><li>• The Future of Feminism Needs YOU: An Open Call for Advisory Group Members</li><li>• Minority Serving Institution Fellowship: Call for Applicants</li></ul>

### Implications for AEA's Future

I bet that there are a lot of people who may want evaluation knowledge, who would look at our values statement, look at the headlines in our newsletter, and shop elsewhere. I also think the appearance of these headlines and their associated stories are consequences of the evolutionary processes that I outlined in Table 1. Or put differently, powerful factors are at work to produce what AEA is now, what it will be, and its appeal to a narrow segment of potential customers for evaluation.

I did not write this article to advocate change. But I do think we should contemplate the situation in terms of the long-range consequences for aspects of our Vision and Values, which I repeat here, this time outlined in **blue**.

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- ii. We value high quality, ethically defensible, culturally responsive evaluation practices that **contribute to decision-making processes, program improvement, and policy formulation.**
- iii. We value a global and international evaluation community and understanding of evaluation practices.
- iv. We value the continual development of evaluation professionals and the development of evaluators from under-represented groups.
- v. We value inclusiveness and diversity, welcoming members at any point in their career, from any context, and representing a range of thought and approaches.
- vi. We value efficient, effective, responsive, transparent, and socially responsible association

As I said at the beginning, we are what we are, and I'm not sure we can or should do anything to change that. But as Linda said to Biff in Death of a Salesman, Attention must be paid.