4

The Nuts and Bolts of Evaluation Conversations

Chapter Preview

- Examine the role of conversations in evaluation practice
- Distinguish evaluation conversations from other conversations
- Introduce seven overarching goals for evaluation conversations
- Provide evaluation conversation starters and detailed questions for engaging people
- Apply the interactive evaluation practice principles to evaluation conversations

INTRODUCTION

An old saying reminds us that talk is cheap, but, cheap or not, talk is the currency of a successful evaluation process. Conversations enable evaluators to stay connected with clients, intended users, and other stakeholders throughout an evaluation, and, if things get rocky—when, for example, an evaluator inadvertently offends a key participant, the response rate to a critical survey is unacceptably low, or a data-laden report draft proves incomprehensible—conversations keep the evaluation moving forward. Of course, the content of the conversations varies as the process unfolds. Sometimes it can include an urgent heads-up about an unanticipated problem threatening to derail the evaluation; other times a conversation brings happy news, such as a finding that affirms what program leaders believed to be true. At any time, however, meaningful dialogue between evaluators and participants in the evaluation is central to the process.

We therefore begin the skill development section of this book by underscoring something an evaluator *can* control—or at least actively pursue and shape—throughout the evaluation. Given an evaluation's interactive nature, evaluators must engage both potential and continuing clients in substantive conversations. They do so for three important reasons: to find out what clients want them to do, to facilitate the evaluation process, and to monitor how well it is going. Although not all evaluators view interaction as critical, we believe that the imperative to communicate is inviolate regardless of where the study sits on the interpersonal participation quotient (IPQ, shown in Exhibit 2.3). It may be especially important in the evaluator-directed zone, where contact between evaluator and client is often less regular or routine.

This chapter first highlights the role of conversations in evaluation practice, distinguishing what makes them different, and then suggests seven overarching goals for such conversations throughout the evaluation, including conversation starters and sample questions for each. The chapter concludes by explaining how you can use the IEP principles presented in Chapter 3 to guide and ground evaluation conversations.

THE ROLE OF CONVERSATIONS IN EVALUATION PRACTICE

If this chapter were a language course, we would call it Conversational Evaluation 101. A conversation is an informal talk with someone, and hundreds of such interactions will occur during a program evaluation. Our point is straightforward: Effective evaluators know how to talk with people, and they have conversations repeatedly throughout the course of an evaluation study. Their ability to interact constructively with a variety of people and their ability to structure meaningful activities are hallmarks of interactive evaluation practice (IEP).

- At an evaluation's inception, clients explain what they want, and evaluators listen attentively and ask questions: Who are the program's stakeholders, and what are their concerns? Who might use the evaluation results, and how will they participate in the study? Who in the organization can and will take part? Who holds power in this setting? Are cultural issues likely to make a difference? What are the resources for the project? What are the funder's evaluation requirements? Are there external constraints that may influence timing and report formats?
- As a study is framed, conversations continue to shape the process as evaluators continue to ask: What questions will the evaluation seek to answer? What is the **logic model** or program theory staff are using? What

are the most effective designs and methods that will answer the questions? What reports will meet the information needs of various audiences? Who will prepare or deliver them?

- Throughout the process, reflective evaluators keep talking and listening—to clients, intended users, and other stakeholders—for any number of reasons: to find out how things are going, to identify changes that might improve the study, to make sense of what they are hearing.

Evaluation conversations occur in many venues: formal meeting rooms, staff offices, and hallways on the way to lunch. They are often interconnected and overlapping, and many stakeholders will add their voices. People may offer strongly held ideas that conflict—for example, when administrators focus on the bottom line of an expensive program, while staff touts its impressive outcomes—or they may present a unified view. Whether owing to context, culture, or personality, some individuals may be uncomfortable expressing their thoughts openly, while others are more than pleased to state their opinions—loudly—in any forum to anyone who will listen. And therein lies the challenge. Whatever an evaluator's approach, the conversations surrounding her practice and skill as the manager of those conversations are essential to moving the process forward. An evaluator's ability to converse effectively with people in an evaluation setting may well be a predictor of the eventual quality of the study that results. An inability to do so—for example, the evaluator who dominates discussions without listening to others or who fails to identify ongoing tensions between key stakeholders—may result in an evaluation that, while in some sense technically adequate, fails to provide intended users accurate information they can act on.

The need to converse effectively is essential even for evaluations that are not highly collaborative. Every evaluation requires a certain level of participation, at the very minimum a client who initially tells the evaluator what he wants done and some form of reporting to the client at the study's conclusion. Consider two examples, one negative and the other positive.

- One example of the importance of evaluation conversations—a negative one—is evident in the first situation described in Chapter 1. Recall in that study the evaluation team purposefully and even with pride chose not to collect test score data, responding to the wishes of the planning group that feared the potentially limiting effects of doing so in the first 2 years of program implementation. Sadly, had the evaluators taken the time to hold even one conversation with the state legislators ultimately responsible for funding the program, they might have quickly come to understand the importance of test scores—any test scores—in the policy arena in which the legislators functioned. Despite the many detailed qualitative case studies, absent test scores, the credibility of the entire evaluation was questioned, and the legislator with the potential to affect the program used his clout to cut its funding. To quote *Cool Hand Luke*, what they had there was a "failure to communicate," and the effect in both cases was grim.

- A second and positive example is the case of a university professor hired to evaluate a large, federally funded training program for health professionals operating in hundreds of community and technical colleges across the country. Once the evaluator had won the evaluation contract, he held initial conversations with agency officials to determine exactly what they wanted to know and the data needed to answer their questions. He then assembled an evaluation team that finalized the design and sample, developed and piloted data collection instruments, and began to collect data. Although he and his team made virtually every decision in planning and conducting the study, he communicated frequently with his contact, seeking input from an agency perspective, asking questions about specific concerns (e.g., how long a survey staff would be willing to complete), and generally ensuring that each step of the evaluation process met with approval. Knowing that the response rate to one survey was critical to the design, he elicited help from higher-ups at the agency, who sent the letter inviting participation. Even though the evaluator was conducting an evaluator-directed study—that is, making decisions and implementing the evaluation plan—he had numerous conversations with his client throughout the course of the study. The final evaluation report, posted on the agency website, was the culmination of these conversations over the study's 3 years.

Without frequent conversations, then, evaluators would be unable to do their job. But what distinguishes a program evaluation conversation from the many similar interactions people have each day? By appearance, evaluation conversations look like any other conversation. Imagine two people sitting across a table from each other, engaged in a face-to-face conversation. Can you tell by looking if they are engaged in an evaluation conversation, as opposed to some other type? Unless you are able to hear what they are saying, the answer is probably not. So what makes an evaluation conversation distinct?

HOW PROGRAM EVALUATION CONVERSATIONS DIFFER FROM OTHER CONVERSATIONS

Evaluation conversations come in many forms. As noted earlier, settings can differ, as can interpersonal dynamics. There are phone calls; informal meetings at an evaluator's office, a coffee shop, or a restaurant; formal meetings around conference tables; and chats during visits to program sites. "In hallway conversations, over coffee, before and after meetings, over the telephone, and through informal networks, the word gets passed along when something useful and important has been found" (Patton, 2012, p. 365). Exhibit 4.1 defines the terms frequently used to describe people who participate in an evaluation. Although the evaluation client and the primary intended user may be different, they are often one and the same, and for this reason we use the terms *client* and *primary intended user* interchangeably.

Exhibit 4.1 Participant Roles for Evaluation Conversations

Term	Definition
Stakeholders	Individuals who have a vested interest in a program or its evaluation
Audience	The individuals or groups who receive evaluation reports
Sponsors/ funders	The people who provide resources to conduct an evaluation
Clients	The people who hire an evaluator and typically help shape and monitor the evaluation study
Primary intended users	"Those *specific* stakeholders selected to work with the evaluator throughout the evaluation" (Patton, 2008, p. 72; emphasis in original)
Program participants	Individuals who receive services from or take part in a program
Evaluation participants	Individuals who take part in a program evaluation in one of two ways: (1) participating in making decisions about the evaluation or in implementing it, or (2) providing data in one form or another

NOTE: In evaluation settings people often play multiple roles. A funder, for example, may also be a primary intended user and an active participant in the study, both by helping make decisions and by providing data. Even with this potential for overlap, the different named roles allow evaluators to distinguish among people in an evaluation context.

Based on Schwab's commonplaces of learning, the commonplaces of evaluation point to four components of every evaluation conversation: (1) a context in which the discussion occurs, (2) a client or intended user, (3) the content of the evaluation process or its results, and (4) an evaluator (King, 1988). In an evaluation setting each of these contributes to a conversation that begins as the evaluation is conceived and may continue well past the time that the evaluator delivers a final report. Each necessarily affects the conversations that will follow. What makes evaluation conversations unique is the setting in which the program and its evaluation occur, the people involved—an evaluator and client—and the content of their conversations.

Context

Students in introductory classes quickly learn that a safe answer to virtually any question about program evaluation is, "It depends" (Trochim, 2008). Evaluations are highly situational, grounded in specific times and places, each of them unique. An important part of evaluation conversations must therefore seek to understand this uniqueness. Questions such as the following become useful: What is the history of this particular program in this particular setting? What conditions or features in this milieu are critical to understanding how the program works? Do people tend to work together in a collaborative fashion, or are they basically on their own? How do culture and politics, large and small, affect the program? How has evaluation played out in this context in the past? In what ways might this evaluation project be supported or at risk?

The Client/Primary Intended User

A key participant in any evaluation conversation is the person who initiates the process to begin with—the evaluator's customer, typically called the client, who may be an individual or a group of people. As the process begins, clients are trying to determine what the proposed evaluation might look like, and they may not have a clue, even when they think they do. Among clients new to the field, there is the distinct possibility that they won't know what evaluation is or can be, what they want or need, or how they're going to use the process or its results. They may have a misconception about the possibilities, hold negative attitudes, or even, on rare occasions, harbor the desire to predetermine the results.

The practice of utilization-focused evaluation focuses attention on the role of *primary intended user* in addition to that of client. Patton (2008) indicates,

> Primary intended users of an evaluation are those *specific* stakeholders selected to work with the evaluator throughout the evaluation to focus the evaluation, participate in making design and methods decisions, and interpret results to assure that the evaluation is useful, meaningful, relevant, and credible. (p. 72; emphasis in original)

This means that the primary intended users are the key individuals with and for whom the evaluator works in a setting. Their information needs and concerns guide the study from inception to conclusion, and they are actively engaged throughout: in its framing, in identifying credible data collection methods, and in making sense of the results.

Conversation Content

Now that there is a context and someone to talk to, it is time to identify the topics specific to an evaluation conversation. Evaluators hold technical power, guide conversations, and ensure the appropriateness of each study. At its most basic, an evaluator and a client will meet to discuss the prospects for beginning an evaluation. There is an unavoidable power dynamic in these conversations in that clients can choose to hire or fire external evaluators, while internal evaluators have to worry similarly about their future, although in a different way. Negotiating explicit and fair contracts results from important conversations held prior to starting an evaluation. As Stufflebeam (1999) puts it, "Without such agreements the evaluation process is constantly subject to misunderstanding, disputes, efforts to compromise the findings, attack, and/or withdrawal—by the client—of cooperation and funds" (p. 1). O'Sullivan (2004) writes, "How evaluators respond to evaluation requests determines whether they will be employed to conduct the proposed evaluations" (p. 41). She identifies three topics for these clarification conversations: "gathering information about the program's nature and scope, determining the purpose of the evaluation, and probing the resources available to conduct the evaluation" (p. 41).

Evaluators would do well to develop specific questions in advance to get at these topics. Stufflebeam (1999, p. 1) developed a helpful resource to prepare for negotiations: a checklist for use by evaluators and clients during evaluation contract negotiations so that key issues will be surfaced, discussed, agreed on, and recorded prior to the study's launch. The checklist includes the following categories:

- Basic considerations, including the object and purpose of the evaluation, the client and other audiences, the values that will guide the study, etc.
- Types of information that the contract could include, e.g., what is required, data collection procedures, instruments, follow-up, etc.
- Two kinds of analytical procedures, one for quantitative data and one for qualitative
- Report details, including deliverables and their due dates; formats, contents, lengths, audiences, and delivery methods for both interim and final reports; and any restrictions/permissions required
- Reporting safeguards, e.g., issues of anonymity/confidentiality, who will have editorial authority and final authority to release reports
- Protocol specifics: (a) contact people, (b) rules for contacting program staff, and (c) communication channels
- Evaluation management issues: (a) the timeline for the evaluation work of both clients and evaluators and (b) assignment of responsibilities for the evaluation
- Possible client responsibilities, e.g., access to information, equipment and materials, workspace, etc.
- Evaluation budget elements, e.g., amounts and dates, conditions for payment, limits/restrictions, etc.
- Provisions regarding review and control of the study: (a) for amending and canceling the contract, (b) for modifying the evaluation design if necessary, and (c) for metaevaluation

From the initial negotiations and over the course of an evaluation, evaluators may work with many people, and, while not everyone is a client in the formal sense of that word, all will have conversations with the potential to affect an evaluation's course. This is a reminder, if we needed one, of why an evaluator's ability to manage interpersonal dynamics is a critical skill. Typically, evaluators and clients/primary intended users share a common commitment to wanting the study done well, so together they make decisions about the process as it unfolds. Among others, topics often include the following:

- *Technical concerns.* The evaluator is responsible for two things: first, ensuring that the design and data are the best possible given the constraints of the context and, second, that the technical quality of the study meets the accuracy standards of the Program Evaluation Standards (Yarbrough, Shula, Hopson, & Caruthers, 2011). Although some may feel insecure around or threatened by evaluators' technical expertise, it is our job to ensure high-quality evaluation. Technical matters can therefore become critically important topics for conversation. Consider, for example, clients who feel pressure from funders to "prove" that their program leads directly to desired outcomes even in short periods of time. It falls to evaluators to shine the light of measurement reality on desired causal claims, collecting data that come as close as technically possible to demonstrating potential causal relations. When pressured on any technical issue, evaluators must stay the course and adhere to professional standards.

- *Political issues*. If technical issues are the evaluator's bailiwick, the reality of the context's politics belongs to the client. Both at its inception and over time, evaluators need to discuss the realities of interpersonal interactions that may affect the evaluation. Context uniquely affects the study as participants engage in evaluation activities. When, for example, the newly appointed interim director of a department in a large county agency attended a meeting about a previously negotiated evaluation contract and made clear his desire to change expectations for the work, the external evaluator, confused by the sudden modification, contacted another staff member to understand what was going on. Since internal evaluators live in an organizational setting, they may be better able to navigate its political waters, creating evaluation processes that are as practical as they can be.
- *Resource questions*. Years ago mothers advised their daughters not to talk about money on the first date, but evaluators, of necessity, should ask about money and other resources as soon as possible after an evaluation is conceived and every time questions arise about a study's funding. For external evaluators, this means determining the expected expenses for evaluation tasks and discussing them with clients; for internal evaluators, this means identifying time and other needed resources and ensuring that organizational funding or personnel are available. How many times has an evaluator spoken with potential clients and designed a study to address their issues, only to find out later that the available budget for the study is woefully inadequate? The $5,000 that is a large sum of money to a small aerobics or teen-parenting program unfortunately doesn't go far in many evaluation settings. As tasks change over the course of an evaluation, it often makes sense to negotiate additional resources or to cut back on what will be done with existing funds.

The Evaluator

Ideally, the evaluator brings a variety of knowledge and skills to the table—technical knowledge related to systematic inquiry and the practice of program evaluation, along with competencies in situational analysis, project management, reflection, and interpersonal skills, including cultural competence (Stevahn, King, Ghere, & Minnema, 2005). Because many clients initially find evaluation to be a foreign language, the evaluator typically leads the conversation, discussing what the client wants evaluated and why and considering the feasibility of a study in light of available resources and other constraints. The evaluator's technical expertise is key. Although everyone is an intuitive evaluator—people are constantly making value judgments—the evaluator wears the mantle of social science inquiry, wielding its power and, for the uninitiated, explicating its mysteries. Werner Heisenberg, one of the 20th century's great physicists, once wrote, "Science is rooted in conversation"—and it falls to evaluators in conversations to make the evaluation process and its technical components comprehensible and to do so in a nonthreatening manner.

The conversations of external evaluators may differ from those of internal evaluators. External consultants can choose whether or not to take a contract and may use initial conversations to make the determination, whereas internal evaluation staff may be required to take on a study regardless of their feelings about it. But internal evaluators also have choices to make. These relate to the practicality of shaping the evaluation so that a useful study will result in a context they probably understand well.

Regardless of placement, it is incumbent on all evaluators to get evaluation conversations right for at least two reasons. First, as evaluation professionals, evaluators hold responsibility for their own professional practice (American Evaluation Association, 2004; see Appendix B) and for the ethical conduct of evaluation studies (Yarbrough et al., 2011). Second, external and internal evaluators alike may suffer later for bad decisions early on. If, as sometimes happens, an evaluator agrees to conduct extensive interviews but doesn't build in sufficient budget support for transcription and qualitative analysis, the team may find itself doing challenging intellectual work for minimum wage.

What, then, distinguishes an evaluation conversation from other conversations? First, as noted earlier, evaluation conversations engage two individuals or groups of individuals in a given context in a single-minded focus on the evaluation process and its results, working together to make sure that the evaluation will be as useful and sound as conditions allow. Second, even if there are only two people in the room, evaluation conversations never involve only two people. Standing on the shoulders of colleagues past and present, evaluators bring their current versions of evaluator competencies, an awareness of the field of program evaluation with its guiding principles and standards, and the practical knowledge gleaned from previous studies. Clients bring the ghosts of evaluations past and present, an awareness of the complexity and political challenges of their organization, and ongoing relationships with multiple people in the evaluation context. Third, evaluation conversations are not one-time affairs. To be effective, evaluators and clients need to talk throughout the evaluation. And what exactly do they talk about? With the groundwork laid, let's get to the actual nuts and bolts of evaluation conversations.

OVERARCHING GOALS AND SAMPLE QUESTIONS FOR EVALUATION CONVERSATIONS

The phrase *nuts and bolts* brings to mind basement workshops, hardware stores, and renovation sites. For people unskilled at carpentry, it may also signal intense frustration. But this image is an apt one for discussing evaluation conversations because, just as nuts and bolts connect basic components in a construction project, the questions that follow will join evaluators and evaluation participants in important conversations to strengthen evaluations. We prescribe a set of seven broad goals for conversation that evaluators can use to engage clients, primary intended users, and other appropriate people/stakeholders in planning and implementing an evaluation.

Initial evaluation conversations take place when entering an evaluation context, before a project actually begins. Three goals frame these conversations:

1. Understand the client's and participants' perceptions of evaluation and establish positive relationships.
2. Determine what the client/primary intended user wants/needs.
3. Determine whether the context is a viable setting for a program evaluation.

The next three goals for conversation, not surprisingly, overlap with the basic inquiry tasks (BIT) introduced in Chapter 2 and should be pursued once the evaluator is committed to a study. In fact, conversations to achieve these goals realistically will take place in a repeated fashion throughout its duration:

4. Determine how the study will be conducted.
5. Determine how best to collect and analyze information.
6. Determine what the data mean and how best to present them.

Throughout the process and especially at its conclusion, the seventh and final goal for evaluation conversations encourages evaluators to reflect with their clients on the evaluation process.

7. Reflect on how the evaluation is going and what has been learned.

Two exhibits provide detailed information to enable evaluators to shape conversations throughout the evaluation. Exhibit 4.2 links the seven overarching conversation goals to issues evaluators may consider at specific stages in an evaluation and potential pitfalls signaling concerns that could require special attention. Exhibit 4.3 starts with the same overarching goals, then, for each, provides conversation starters to initiate an evaluation conversation, along with a sample of more detailed questions that evaluators can select from, adapt, or add to in preparing for conversations in specific contexts. You'll see that a few of these questions assume more knowledge of evaluation than a typical client might have (e.g., knowledge of different approaches and designs or of measurement). For those questions, the evaluator would outline sufficient content for the conversation, explaining throughout to ensure that the answer to the question sufficiently addresses the issue.

Exhibit 4.2 Goals for Evaluation Conversation, Issues to Consider, and Potential Pitfalls

Conversation Goals	Issues to Consider	Potential Pitfalls
Before agreeing to conduct a study . . .		
1. Understand the client's and participants' perceptions of evaluation and establish positive relationships.	• Setting and atmosphere in which the conversation is held (formal, constrained, open, friendly, well documented, etc.) • Preexisting relationships with key participants • Prior knowledge of and reputation of the individuals • Cultural issues to attend to in the setting • Level of people's evaluation knowledge/experience • People's attitudes toward program evaluation	• There is an evident hostility or lack of trust between/among people involved in the evaluation. • Participants hold negative attitudes toward evaluation. • Evaluator lacks familiarity with the cultures involved.

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Exhibit 4.2 (Continued)

Conversation Goals	Issues to Consider	Potential Pitfalls
2. Determine what the client/primary intended user wants/needs.	• The reason for the evaluation at this time, including the source of initiation • Specific requirements of the study (e.g., accountability data or reports required, deadlines) from funders/sponsors • Extent of existing program documentation (rationale, goals, activities, etc.) • Clarification or development of logic model, program theory, or theory of change (as appropriate) • Primary intended users for the evaluation • Extent to which clients have thought through the study, including (a) specific information about what clients want from the proposed study (e.g., its purposes, who will use the results) and (b) clarity of decisions that may result (e.g., programmatic "go/no-go," staffing, improvement processes)	• Clients are unaware of or unclear about what they want. • The funders' expectations for the program or its evaluation are unrealistic. • The program theory is incomplete or overly idealistic. • Clients want to commission a pseudoevaluation (i.e., they already know the desired results of the evaluation). • Cultural issues/assumptions or conflicts of interest are likely to affect the evaluation negatively.
3. Determine whether the context is a viable setting for a program evaluation.	• Understanding the organizational environment in which this study will take place • Existence of underlying needs or conflicts that might affect the evaluation • An inclusive list of stakeholders and their likely concerns • Potential resistance to evaluation or to change • Resources available for the study, including budget and in-kind commitments	• There is evident hostility or a lack of trust between/among people involved in the evaluation. • Clients are unwilling to participate in key decisions related to the evaluation. • Leaders who are gatekeepers are not actively involved. • There are no clear intended users or uses for the study. • Limited resources are available for the study. • Available time is unlikely to support a viable study.

Conversation Goals	Issues to Consider	Potential Pitfalls
	• Timeline for the evaluation and its components • Potential ethical, legal, or cultural considerations • Other feasibility issues, including likely constraints (e.g., political issues in the organization, staff interest, personnel turnover)	• Cultural issues/assumptions may limit the study's outcomes. • The evaluator is unable to develop a strong design.
After agreeing to conduct the study and throughout . . .		
4. Determine how the study will be conducted.	• The overall approach to the evaluation, including purposes and potential uses • Broad, overarching questions the evaluation will answer • The information required to answer these questions • A feasible design and credible methods for collecting necessary data • Instrumentation plans • A sampling plan	• Clients are unaware of or unclear about what they want. • Clients are unwilling to participate in key decisions related to the evaluation. • Available time or other resources are unlikely to support a viable study. • The chosen design and methods are not credible in the given context. • Cultural issues/assumptions may limit the study's outcomes.
5. Determine how best to collect and analyze information.	• Identifying and recruiting appropriate samples • Developing or locating instruments and implementing the data collection plan • Checking the data for accuracy • Compiling and storing the data • Establishing who owns the results and who will have access • Determining the need for confidentiality • Analyzing the data, both quantitative and qualitative • Preparing appropriate data summaries	• Parts of the data collection plan prove to be unrealistic (e.g., the sample ultimately available differs from that needed; response rates are low). • The study costs more than expected. • The timeline is too short to meet the client's needs. • There is a lack of support from staff. • The data appear to have problems (validity, reliability). • Data get lost. • Analysts conduct inappropriate analyses. • Data summaries are confusing or unclear to primary intended users.

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Exhibit 4.2 (Continued)

Conversation Goals	Issues to Consider	Potential Pitfalls
6. Determine what the data mean and how best to present them.	• Interpreting data in light of the context and drawing appropriate implications • Structuring and enhancing potential use • Whether or not to make judgments explicit and the criteria and standards with which to do so • Whether or not to develop commendations or recommendations • Structuring reports that will communicate clearly • Disseminating the results in various forms	• People draw incorrect interpretations from the data. • Intended users ignore the evaluator's statement of limitations. • Intended users want a simplistic version of the results. • Reports don't meet the needs of the primary intended users. • People run with parts of the analysis they like and disregard the rest. • Results are disseminated, but no one uses them.
During and after the study . . .		
7. Reflect on how the evaluation is going and what has been learned.	• Tracking the evaluation from beginning to end, tackling challenges as they arise • The eventual learnings that result from this study • What went well during the study and what didn't • Things to do differently next time	• Clients are unwilling to participate in routine reflection about the evaluation. • Problems arise but are not addressed. • Evaluators see no possibility for improvement in the evaluation process.

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Exhibit 4.3 Evaluation Conversation Starters and Sample Questions

Conversation Starters	Sample Questions
1. Understand the client's and participants' perceptions of evaluation and establish positive relationships.	
How do people in this organization feel about program evaluation?	• When you think about program evaluation, what word comes to mind? Why? • What was the best program evaluation you ever participated in? What made it good? What happened as a result?

Conversation Starters	Sample Questions
	• How do others in the organization feel about evaluation? On what do you base your comments? • What previous evaluation experiences have you had? • How has evaluation played out in this context in the past? • To what extent has staff received training in program evaluation, whether formal or informal? • How much experience has staff had with program evaluation? • How would you characterize their experiences? • Who are the evaluation champions in your organization?
Tell me about the organization's culture.	• How would you describe the culture of this organization? • How do people generally get along in this organization? • What previous involvement has your organization had with evaluation? • What is the organizational structure for program evaluation? • Is this an organization where evaluation is routinely part of ongoing work? • Who holds power in this setting? • To what extent might cultural issues, assumptions, or expectations affect the evaluation? • To what extent is there potential resistance to this evaluation or to change more generally? • To what extent are people likely to be eager participants in the evaluation process? • To what extent do people routinely use data as part of their ongoing activities?
2. Determine what the client/primary intended user wants/needs.	
What program is being evaluated?	• Tell me about the program you want evaluated. • How long has the program been in operation? Describe its development over time. • What is the history of this particular program in this particular setting? • What do you see as essential aspects and key characteristics of the program? • To what extent are the program's goals and objectives clearly specified? Are the program outcomes specified? • What are the program's activities? What do participants do? What does staff do? • Are there explicit criteria and standards for this program or others like it? • Has staff developed a logic model, program theory, or theory of change? What logic model or program theory is staff using? • Is the program being implemented as planned? If not, why not? • Do you have documentation or archival records for the program? • What have been the results of previous program evaluations (if any)?

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Exhibit 4.3 (Continued)

Conversation Starters	Sample Questions
	• What are some of the problems, frustrations, joys, and positive activities that people report about this program? • What do people like most and least about this program? • What concerns have people expressed about this program? • What conditions or features in this setting are critical to understanding how the program works? • How do culture and politics, large and small, affect the program?
What is the purpose of this evaluation?	• Can you tell me how this evaluation came to be? • Why are you planning to conduct an evaluation at this time? • Is this a formative, summative, or developmental evaluation? • To what extent is accountability a factor in conducting the evaluation? • What are people most concerned about regarding this program and its evaluation? • What kind of information would be helpful? • Who might be interested in the results of this study? • Who will actually use the results of the evaluation? What are their concerns and questions? • Are there judgments or decisions that may be linked to the results? • What are expectations for the study? • Who are the stakeholders for this program, and what are their concerns? • Do you hope to teach people about the evaluation process through this study (i.e., build their evaluation capacity)? • Is this evaluation part of ongoing data collection in the organization? • To what extent is this part of a larger organization development process? • Are there any ethical, legal, or cultural considerations to keep in mind as we move forward with the evaluation?
What are the requirements for this evaluation?	• Is this evaluation in response to a mandate or a grant requirement? • Are there external constraints that may influence timing and report formats? • Who are the funders, and what are their expectations for the study? • Who is in charge of this evaluation? • Are there expectations about who should participate in the evaluation? • Are there any required data elements? • How many times is the evaluator expected to meet with the contractor? (O'Sullivan, 2004, p. 51) • Are there program events that the evaluator is expected to attend? (O'Sullivan, 2004, p. 51) • What are the reporting requirements? • What is the timeline for the evaluation? How fixed is it?

Conversation Starters	Sample Questions
3. Determine whether the context is a viable setting for a program evaluation.	
Help me understand the organizational setting where this evaluation will take place.	• What is the organizational hierarchy? Is there an organizational chart? • What is the organization's mission? Is there a strategic plan in place? How might these relate to the proposed evaluation? • In general, how do people get along in this organization? • How are tasks typically structured in this organization? • What kinds of opportunities exist for teamwork? • What structures already exist for people to discuss the evaluation? • What underlying organizational needs or conflicts might affect the evaluation? • To what extent do cultural issues, traditions, or expectations affect the organization? • Are there topics that are simply off-limits for discussion in this organization? • What other major initiatives are taking place in the organization that might compete with evaluation activities? • Has the organization engaged in evaluation capacity building or continuous improvement processes?
Who cares about this evaluation? How might they use the results?	• Who in the organization might be interested in engaging in the evaluation process? • Who in the organization can and will participate in the evaluation process? • Who might use the evaluation results, and how will they participate in the study? • If this evaluation is conducted to meet funding requirements, how can it also be useful to other people? • Who has demonstrated interest in this program in the past? In its evaluation? • Who has decision-making authority for the program being evaluated? • How will primary decision makers be involved in the evaluation? • Is there any sort of advisory structure (formal or informal) for the program? For the evaluation? • What structure exists for processing the evaluation results? • Is this a meaningful evaluation? Does the possibility exist that it has been created for political or symbolic reasons? • Imagine different outcomes for this evaluation. How might these affect the management and continued work of the program?
What support exists for this evaluation?	• What funding or other resources are available for this evaluation? • What role do you see for the evaluator in this project? • What are your expectations for stakeholder involvement?

(Continued)

Exhibit 4.3 (Continued)

Conversation Starters	Sample Questions
	• Are there staff members who will engage in this study? • Are there individuals who may oppose the study and work against it? • Are there any significant funding issues that may affect the evaluation? • Does the organization pay for overhead? (O'Sullivan, 2004, p. 51) • In what ways might this evaluation project be supported or at risk?
4. Determine how the study will be conducted.	
What overarching questions will frame this evaluation?	• Who will determine the overarching questions for the evaluation? Should a broad range of participants be involved? • To what extent do people know the evaluation questions they want answered? • Do these questions focus on important issues that will make a difference to the program? From whose perspective? • Will this evaluation result in judgments? About what? • Will this evaluation lead to decisions? Which? • From a measurement perspective, can these questions be answered well? • Is it feasible to answer these questions with the resources available? • Are there any ethical concerns about seeking to answer these questions? • Are there cultural issues or traditions to attend to in choosing the questions? • Who is going to use the information generated by these questions? • Do the intended users of results want to know the answers to these specific questions?
What overall approach and design for this evaluation make sense?	• There are many approaches to program evaluation. Of those available, which will work best for this evaluation? • Are there cultural issues or expectations to attend to in choosing the approach? • To what extent will this be an evaluator-directed, collaborative, or participant-directed study? • Do you hope to teach people about the evaluation process through this study (i.e., build their evaluation capacity)? • What design fits best for this evaluation? Does the context meet all required conditions for using the desired design? • Is the design selected feasible in this setting? Will it be credible to key participants? Will it adequately address the evaluation questions?

Conversation Starters	Sample Questions
5. Determine how best to collect and analyze information.	
What data collection methods will work well for this evaluation?	• What methods will be most credible to the intended users of the evaluation? • How will we ensure that the data are accurate, credible, and trustworthy? • What cultural issues require attention during data collection? • What is our sampling plan? • How will we ensure that all important voices are heard during the data collection process? • Are we creating our own or using existing instruments? • How will we ensure the quality of the instruments we use? • Who will actually collect the data? Will they receive training? • To what extent will budget issues affect data collection? • Is the data collection plan realistic? • Who will monitor the data collection process internally? • How will data be compiled and stored securely? • Is it possible that someone will attack the methods used in the evaluation? • What is the potential for conflict if we use these methods?
What analysis makes sense?	• How will we ensure that the analysis is accurate, credible, and trustworthy? • What analytical techniques are appropriate for the data collected? • Which types of analyses will best address the evaluation questions? • Will the primary intended users find the analysis credible? • Would different types of analyses conducted on the same data set provide a fuller picture of results? • Who has the expertise and/or skills necessary for the analyses deemed most appropriate? • Will special resources be required, such as qualitative analysis or statistical software packages? • Will special training be required for those participating in data analysis?
6. Determine what the data mean and how best to present them.	
What do the results mean?	• In general do the findings make sense from an organizational perspective? • What are the implications of these results for policy, practice, and future assessments? • What do the results mean in light of the strengths and limitations of the evaluation design? • Who should be involved in grappling with what the findings mean?

(Continued)

Exhibit 4.3 (Continued)

Conversation Starters	Sample Questions
	• Should standards or criteria be established for interpreting evaluation findings? • What do the results imply for commendations and recommendations? • Who will be involved in developing recommendations—evaluators, clients, both, or other stakeholders likely to be affected by the outcomes? • Do quantitative and qualitative findings align in mixed-methods studies? • Should guidelines for interpreting mixed-methods findings be established before drawing conclusions?
What reporting formats are likely to work well in this context?	• What are the internal or external requirements for reports? • Is there a need for a formal written report, and, if so, in what form? • How are primary intended users getting the information they need? • What reports will meet the information needs of various audiences? • Who will prepare or deliver reports?
7. Reflect on how the evaluation is going and what has been learned.	
What are the strengths and limitations of the evaluation at this point?	• What's going right with the evaluation? • What changes would you suggest? • Are samples/sources representative enough to address the evaluation questions adequately? • Are adequate, accurate, and credible data being collected capable of addressing the study's questions? • What are your people telling you about the evaluation process? • Should we stay on course at this point or revise procedures? • What lessons have we learned from being involved in evaluation tasks?
Now that the evaluation is complete, what lessons have been learned?	• If you were going to do this evaluation again, what would you do the same? Differently? Why? • What are the biggest lessons you've learned from this study's outcomes? • What do you think people learned from participating in this evaluation? • How can we apply lessons learned to future evaluation projects? • If capacity building was a goal, what did people learn about the evaluation process?

Evaluators should keep two things in mind. First, some conversations will be held in written form as drafts are shared and edited or as people exchange e-mails or other forms of electronic communication. A "conversation" won't always involve two individuals talking face-to-face, although the dangers of miscommunication present in electronic interactions in many cases highlight the value of taking time to meet in person. No one can forward or blind copy the content of a face-to-face meeting. Second, the questions listed will not necessarily be asked outright or directly. Often an evaluator will need to finesse a challenging conversation or a tense situation, and asking a question outright may risk scuttling the interaction. Evaluators may want to consider these questions as topics around which to engage people in discussion. By having a conversation about a topic, you may get the information needed to move forward, even though you never ask the exact question directly.

How might an evaluator use these ideas to shape conversations? Take the example of a director at a small natural history museum who created a new exhibit and, using grant money, hired an evaluator to collect information. What she, the director, needed to know in the 6 months before the exhibit went on the road to museums around the country was straightforward: what worked for visitors ranging in age from early childhood to retirees, and what ought to be changed. In an e-mail, the director—the potential client—arranged for the evaluator to come to the museum to view the exhibit as it was being installed and to chat briefly about the study. She sent him a copy of the successful grant proposal, which included details about the exhibit and its evaluation requirements.

During this initial face-to-face conversation, the evaluator, who had worked with the director tangentially on an earlier study, built on an existing relationship with both her and her supervisor, who also came to the first informal meeting. He already knew that they and the museum's culture more broadly valued evaluation processes and paid serious attention to data. Because it was a natural history museum with numerous scientists on staff, methodological rigor was an important criterion, especially for qualitative methods; some staff members—although not the client and his boss—questioned the validity of so-called "soft" methods even though perceptual data were important indicators of visitor satisfaction. The evaluation budget totaled \$10,000. Held while the director and evaluator stood in the exhibit gallery, this opening discussion primarily concerned the second, third, and fourth overarching evaluation conversation goals. Exhibit 4.4 outlines specific questions pertinent to these goals that the evaluator asked and summarizes the answers discovered.

Several additional conversations and related e-mail exchanges led within a month to a draft design that the director quickly approved and to an observation form and separate interview protocols for parents and teachers (adapted from other studies at the museum), which the director also reviewed and approved.

Exhibit 4.4 The Museum Evaluation: Questions and Answers From an Initial Evaluation Conversation

Conversation Goals	Questions	Answers
2. Determine what the client/ primary intended user wants/needs.	What are the expectations for the evaluation?	The grant requirements explicitly state that a formative evaluation will gather information for improving the exhibit before it begins traveling.
	Are any data required?	Nothing is specified in the grant.
	What is the timeline for the evaluation? Is it fixed?	The exhibit is scheduled to move to another site in 6 months. The evaluation needs to be completed in 4 months to allow time for any changes to be made in the exhibit. There is no flexibility in this timeline.
	What are the reporting requirements?	Given the short timeline, the director wants updates from the evaluator and his team on an ongoing basis and monthly meetings to discuss progress. The final report needs to be written for inclusion in a report to the funder.
	To what extent will this be an evaluator-directed, collaborative, or participant-directed study?	Although the director is interested in the evaluation, she is hiring the evaluator to handle both the planning and the implementation of the evaluation. She definitely wants an evaluator-directed study, as she is busy with other projects and has the funding to hire out.
	Are the exhibit's outcomes clearly specified?	The grant proposal states the exhibit's outcomes clearly.
	Who will use the results of the evaluation? What are their concerns?	The director and her superior are responsible for using the results of the study and are eager to do so. The director wants to know three things: (a) what people enjoy most about the exhibit, (b) their travel pattern through it (how they move from element to element; how long they stay at different elements), and (c) what they learn as a result of seeing the exhibit. Her superior is especially interested in the extent to which family versus school groups have different experiences.
	What decisions might be linked to the results?	Decisions about how to alter the exhibit so that enjoyable and popular elements are highlighted or enhanced and visitors' learning increased will be made based on the evaluation.

Conversation Goals	Questions	Answers
	Are there any special ethical, legal, or cultural considerations to keep in mind?	Many of the visitors to the exhibit will be children under the age of 18, so human subjects issues require attention. Parents may be willing to give permission for their children to be interviewed. It will be harder to get permission for children in school groups. If the evaluation relies on public behavior (e.g., tracking people in the public space of the exhibit), there will be less to worry about. Another issue concerns the potentially different responses of various cultural groups, so the evaluator needs to think about how to collect data to address that.
3. Determine whether the context is a viable setting for a program evaluation.	Does the exhibit have any type of advisory structure?	This exhibit does not have its own advisory structure, but the museum does have a citizens' committee that reviews the overall exhibit plan on an annual basis. They are not expected to review this evaluation's plans or results.
4. Determine how the study will be conducted.	Who will determine the overarching questions for the evaluation?	Because this will be evaluator-directed, the evaluator and his team will frame the overarching questions as well as everything else related to the study in consultation with the director.
	Is it feasible to answer these questions with the resources available?	The evaluator will plan the evaluation within the constraints of the existing budget. There may be some support available from museum volunteers, who may be able to collect certain data.

NOTE: This exhibit presents a portion of a much longer conversation held at the beginning of the museum evaluation. In this segment the evaluator focused on the second, third, and fourth conversation goals to find out more about the framing of the study and its implementation.

The evaluator hired two people to work on the project with him. Together they collected and analyzed data, interpreted results, and prepared brief summary reports for the director each month. These reports were the subject of monthly conversations with the director about how the evaluation was going and the extent to which the information gathered was useful to her. When an early analysis of the observation data suggested that boys' patterns of movement through the exhibit differed from those of girls, the director invited the evaluation team to a meeting with the exhibit's staff to discuss what these unexpected results might mean.

Author and Nobel Prize winner Naguib Mahfouz once noted, "You can tell whether an individual is clever by his answers. You can tell whether an individual is wise by his questions." So, too, the evaluator. The numerous questions listed in Exhibit 4.3 provide many options—although, admittedly, there are many more—for evaluators to frame evaluation conversations as a study begins, as it runs its course, and when it is finished. Evaluators who are able to frame conversations and effectively use the information gained are likely to increase ongoing support and feedback for the evaluation process from start to finish.

CONVERSATIONS AND THE INTERACTIVE EVALUATION PRACTICE FRAMEWORKS

This chapter has presented seven overarching goals for evaluation conversations, broadly framed conversation starters, and specific sample questions. Let's now briefly discuss each of the overarching conversation goals in light of the BIT (Exhibit 2.1), IPQ (Exhibit 2.3), and evaluation capacity building (ECB; Exhibit 2.6) frameworks presented in Chapter 2.

1. *How can the evaluation process reveal the client's/participants' perceptions of evaluation and foster positive relationships?* In early stages of the evaluation, the evaluator's primary role is that of actor, establishing connections with key individuals—clients and primary intended users—who will guide and support the process and understanding the organizational setting in which the evaluation will take place. Patton's (2008) personal factor emphasizes the importance of identifying those people who care about the evaluation and want to participate actively. By examining relationships and working to respect cultural concerns, an evaluator can come to understand how people in the context interact with one another, including their past experiences with program evaluation and the issues that are important to them. The IPQ may prove a helpful heuristic, as it makes the evaluator's role and related relationship with people explicit. If ECB is one of the evaluation's intentions, it is especially important to identify people's attitudes toward program evaluation and the organization's current culture to determine the baseline on which the ECB process will build.
2. *What does the client/primary intended user want or need?* This focus, related to framing questions, the first of the BIT, seeks to clarify the

client's evaluation needs by describing the program to be studied, the overall purpose and specific requirements of the study, and the existing resources for its conduct. The evaluator serves primarily as a decision maker, paying attention both to the concerns of key individuals and to cultural factors that may shape the study. Specific evaluation requirements may direct this initial framing of the study, and both the IPQ and the ECB frameworks can help clients choose situation-specific roles with varying levels of engagement for themselves and the evaluator.

3. *Is this context a viable setting for a program evaluation?* This concern zeroes in on the specifics that may affect the proposed evaluation. How might the reality of this organization affect the evaluation process, and who, exactly, might be the primary intended users engaged throughout? Again, the evaluator is first and foremost a decision maker, thinking about relationships, political factors, the potential for conflict, and cultural issues that will necessarily shape future activities. At this point reflecting on the BIT will push the evaluator to consider how the study might play out in this setting, and the IPQ and ECB may suggest possibilities for who on-site should engage in specific evaluative tasks.
4. *How will the study be conducted?* This points to technical issues related to the final evaluation questions the study will address and the general approach the evaluation will take. Here the evaluator's role as decision maker is critical to framing the study's overarching questions and developing a design and sampling plan—the first three of the BIT. It remains important to connect personally with the client and to identify possible political and cultural concerns that may affect the study's conduct. This is also the time to structure participation in the evaluation purposefully so people will interact meaningfully within the process. Collaborative or participant-directed studies will require special types of activities to engage people, as will those that seek to build evaluation capacity as a desired outcome.
5. *How can information best be collected and analyzed?* Now the evaluator becomes an actor, engaged in the quintessential technical activities of collecting and analyzing data, the fourth and fifth of the BIT. In collaborative or participant-directed studies, the evaluator will structure tasks that allow others to participate in collecting or analyzing data, paying ongoing attention to the quality of their work. If the study seeks to build people's capacity to evaluate, the data collection and analysis processes need to be instructional so people will learn by engaging in these two

activities. Although the emphasis at this stage is technical, evaluators should attend to issues of potential credibility of the data and their analysis to key users.

6. *What do the data mean, and how can they best be presented?* Once again the evaluator becomes an actor performing vital evaluation activities, the sixth and seventh of the BIT. The interpretation and reporting process needs to address the concerns of clients/primary intended users, and, depending where on the IPQ the study falls, the evaluator should carefully structure their participation with special attention to cultural details that may be at work. Evaluators engaged in collaborative studies and coaches for participant-directed studies must ensure the technical accuracy of the final interpretations and reports. Again, if ECB is a goal, this step must be shaped as instruction so people learn how to interpret and report evaluation results. As existing relationships and politics may affect both these activities, conflicts may arise as people see the end of the evaluation in view.

7. *How is this evaluation going, and what has been learned?* Ideally, the evaluator and clients have been answering these questions throughout the course of the evaluation, building on a commitment to attend to the issues that affect the primary intended users. At the end of the study comes a pause when the evaluator dons her reflection cap and engages her client in determining lessons learned across all the stages of the evaluation. The BIT, IPQ, and ECB frameworks may prove helpful in shaping a conversation about what worked well and when other options might have made better sense. Circling back to reflect on relationships may help people see how the interpersonal factor worked in their setting, or not.

Although never displayed in a gallery, effective evaluation conversations are surely an art form. The six interpersonal competencies in the Essential Competencies for Program Evaluators (Stevahn et al., 2005; see Appendix C) can all play a part in successful conversations during the course of an evaluation. Holding evaluation conversations requires continuing intentionality on the part of the evaluator and a commitment to both hearing and using people's input. In general, it is helpful to put people at ease as much as possible, to listen actively and take notes, and to continue asking questions. Playing the role of interviewer may elicit detailed responses from those being interviewed, and summarizing what the evaluator understands to be points of agreement may allow people to either agree or make corrections. Nonverbal cues often help tell a story, so evaluators need to use their interpersonal "antennae" to intuit when people have a different opinion or have more to say. In those situations it is important to follow up by asking for clarification or additional information.

In one sense, engaging in evaluation conversations is fairly straightforward. Most people love to talk, especially about themselves and things they find important. However, the next step, making decisions based on the information gleaned from the conversations, may prove more difficult. After all, not all talk is helpful, and some participants may hope to sabotage the evaluation rather than move it forward. The three IEP frameworks (BIT, IPQ, and ECB) provide a way to consider that next step—making decisions—with the potential for decisions well made.

APPLYING INTERACTIVE EVALUATION PRACTICE PRINCIPLES TO EVALUATION CONVERSATIONS

Regardless of where they are held or how formal they are, conversations are the lifeblood of the evaluation process. The ability to interact with people constructively is a hallmark of effective IEP, and conversations enable evaluators to engage in such interactions. Sometimes two people are engaged in the conversation; other times many people, including perhaps an evaluation team and a program team, crowd the room. Sometimes the people with the power to make key decisions are present; other times they are notably absent. Some conversations involve strong emotions vented as outbursts; others are businesslike or even, on occasion, mind-numbing.

Exhibit 4.5 highlights how the IEP principles apply to evaluation conversations. "Get personal" reminds us that in using conversations to connect with primary intended users and others, evaluators can learn about how they interact and what matters to them. Evaluators should strive to structure conversations intentionally, systematically, and with thoughtful attention to cultural concerns. As people talk, the setting's context and political issues will unfold, and evaluators can build relationships that will carry them through the study. Conflict may well emerge through conversations, but conflict revealed can then become the topic of additional discussion. Please note that the admonition to "take time" applies across the board. In our opinion it is imperative that evaluators *make* time at every stage of a study for conversations that engage people in meaningful interactions for planning and conducting the evaluation.

Exhibit 4.5 Applying IEP Principles to Evaluation Conversations

IEP Principle	Applied to Evaluation Conversations
1. Get personal.	• Strategically engage primary intended users in evaluation conversations. Learn what matters to them; determine their priorities and agendas. • Pay attention to the ways in which people interact during evaluation conversations; identify personal interactive styles. • Be personally present in evaluation conversations; listen intently. • Strive to establish cooperative relationships in evaluation conversations.
2. Structure interaction.	• Intentionally interact with appropriate others to seek answers to the overarching goals of evaluation conversations. • Be systematic about structuring positive interdependence among conversation participants, to the extent possible. • Interact with primary intended users to create cooperative norms for the evaluation and, as possible and appropriate, within the organization.
3. Examine context.	• Engage in evaluation conversations with appropriate others to examine and better understand the context of the evaluation setting.
4. Consider politics.	• Engage in evaluation conversations with appropriate others to better understand political considerations, issues, and agendas that will likely affect the success of the evaluation study.
5. Expect conflict.	• Know that each person will bring diverse interests and perspectives to evaluation conversations; listen carefully and communicate understanding. • Frame conflicts and disagreements that may emerge in evaluation conversations as mutual problems to be solved rather than as contests to be won.
6. Respect culture.	• Apply cultural competence and cross-cultural communication skills in evaluation conversations. • Attend to cultural values, customs, norms, or traditions for respectful and constructive communication. • Value voice and inclusion in evaluation conversations.
7. Take time.	• Meaningful conversations take time; don't rush the process of obtaining important information that will be needed to shape an effective evaluation. • Systematically take time to reflect on what has been learned from evaluation conversations; use that information to determine future decisions and actions.

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CHAPTER REVIEW

Visiting the section of a hardware store where nuts and bolts are stored reveals how many different types exist. This is also true of the nuts and bolts of evaluation conversations. Evaluators need to consider multiple concerns in planning and conducting ongoing exchanges with clients.

1. Without frequent conversations, evaluators would be unable to do their job.
2. Evaluation conversations engage a client/primary intended user and an evaluator in a specific context discussing issues related to the evaluation, including (a) technical concerns, (b) political issues, and (c) resource questions. They occur throughout the evaluation process.
3. There are seven overarching goals for evaluation conversations: (a) Understand the client's and participants' perceptions of evaluation and establish positive relationships, (b) determine what the client/primary intended user wants/needs, (c) determine whether the context is a viable setting for a program evaluation, (d) determine how the study will be conducted, (e) determine how best to collect and analyze information, (f) determine what the data mean and how best to present them, and (g) reflect on how the evaluation is going and what has been learned. Evaluators can use these to guide and focus conversations.
4. This chapter provides detailed lists of potential issues, pitfalls, conversation starters, and more detailed questions for evaluation conversations. Exhibit 4.2 links the seven overarching goals to issues evaluators may consider at specific stages in an evaluation and to potential pitfalls that signal concerns. Exhibit 4.3 also starts with the overarching goals, then provides conversation starters to initiate an evaluation conversation and specific questions that evaluators can use in particular contexts.
5. The three interactive evaluation practice frameworks presented in Chapter 2 (basic inquiry tasks, interpersonal participation quotient, and evaluation capacity building) can help evaluators think more broadly about evaluation conversations.