

New Directions for Evaluation

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The Spring 2005 issue of *New Directions for Evaluation*, Teaching Evaluation Using the Case Method, edited by Michael Q. Patton and Patricia Patrizi is intended to advance the practice of evaluation teaching using the case method by “providing specially developed cases for teaching and teaching guidelines and discussion points to use in conjunction with the cases” (p. 3). In this issue, chapters 2-4 conclude with “Teaching Guidelines and Questions,” which are intended to provide general case teaching guidance by providing case teaching questions and evaluation points to elicit through questioning.

Chapter 1, Case Teaching and Evaluation, by Michael Q. Patton and Patricia Patrizi, outlines the logic and likely benefits of using and applying cases as a teaching method for students of evaluation. The authors argue that case teaching and training, like the longstanding traditions of using cases for teaching law and medicine, will prepare future evaluators for the practical problems that arise in real-world evaluations (e.g., “professional practice does not lend itself to rules and formulas” and “decisions are rarely routine”, p. 5). The strategies for case teaching strategies presented by the authors in this chapter include (1) facilitating case discussion to provide experiences in evaluative thinking, situational analysis, and practical problem solving for real-world evaluation, (2) set and model norms of civil interaction, (3) emphasizing advanced preparation, (3) setting expectations

and creating a learning frame of mind, (4) starting the questioning process by eliciting the facts of the case, (5) vive la difference [e.g., reconciling opposing points of view], (6) adding hypothetical and incorporating role playing, (7) concluding with takeaways and generalized learning, and (8) supporting active, practice-oriented learning. Patton and Patrizi conclude the chapter by stating that

Evaluation as a field of professional practice has long way to go to achieve the prestige of fields like law, medicine, and business, but the challenges we face in supporting the development of skilled practitioners who can analyze unique situations, deal with diverse people, and exercise astute judgment bear striking similarities to these professions.

(p. 13)

In Chapter 2, *Evaluation of the Fighting Back Initiative*, by Kay E. Sherwood, presents the case of the Robert Wood Johnson Foundation's Fighting Back initiative, an \$88 million dollar investment by the foundation for developing community-generated strategies for reducing use and abuse of alcohol and illegal drugs. This investment included \$14 million for an independent evaluation of the foundation's initiative. In the case, Sherwood provides all of the necessary background and contextual information for making the case a usable teaching tool. Also presented in the case are early efforts at evaluating the initiative, beginning in 1990, where the evaluation floundered as the research team was "unable to manage the complexity and comprehensiveness of the design" (p. 23). This team purportedly wasted \$4.6 million, 4 years, baseline for future efforts, and credibility for the overall effort. Eventually the evaluation was rescued by a new research team, which conducted the 1994-2000 evaluation of the initiative. All in all, the case of the Fighting Back Initiative provides a rich, complex teaching example.

In Chapter 3, Evaluation of the Central Valley Partnership of the James Irvine Foundation, by Martha S. Campbell, Michael Q. Patton, and Patricia Patrizi, the case presented was initiated by the foundation as a “partnership for citizenship” (p. 39). Thus, the purpose of the Central Valley Partnership (CVP) was to engage low income, immigrant, and disenfranchised residents in civic action. In this example, the authors present a case where the role of the evaluator shifts from pure evaluation to “an organizational development resource” (p. 46). In this sense, the case illustrates the various roles and responsibilities that evaluators are often required or requested to perform. The case concludes with comments from Martha Campbell, now the vice president for programs at the Irvine Foundation, in which she states

Irvine’s experience with CVP and its other evaluations has reinforced, as well as tempered, its view of the role and potential of evaluation...As such, Irvine currently adopts an approach to evaluation that has a strong focus on improving program delivery and documenting program innovations or practices for the larger field.

(p. 54)

Chapter 4, Evaluating Home Visitation: A Case Study of Evaluation at the David and Lucile Packard Foundation, by Kay E. Sherwood, presents a case where the foundation used an evaluation-focused strategy to making grants for child development projects. Through this strategy, the foundation’s evaluation efforts frequently emphasized results-based evidence to support project effectiveness, primarily in the form of experimental designs. Unfortunately, as the case presents, these effects were generally “mixed” or “non-significant” (p. 67). Much of the case involves the publication of these poor, disappointing results and the subsequent

fallout generated by them, including efforts for damage control by the foundation and other stakeholders.

In Chapter 5, *Evaluation Case Teaching from a Participant Perspective*, by John Bare, the author describes the benefits of the case teaching method from the view of a learner. Most interesting in Bare's chapter is the "surfacing of values," wherein the author argues that values are pervasive and shape both program planning and evaluation. Moreover, the author notes that "cases help reveal these" (p. 89).

The issue concludes with Chapter 6, *Diverse and Creative Uses of Cases for Teaching*, by Michael Q. Patton. In this chapter Patton presents suggestions for using the cases presented in the issue, and other cases, for the "broader context of evaluation teaching and training" (p. 91). First, the author provides issues for exploring cross-case comparisons including (1) connecting parts into a whole, (2) the personal factor, (3) evaluator roles and purposes, (4) complex relationships and institutional arrangements, (5) controversies and politics, and (6) what is missing? Second, Patton explores additional teaching uses for cases. These uses could include (1) insights into evaluator competencies, (2) learning to write executive summaries, (3) practicing qualitative analysis and extracting lessons learned, (4) stakeholder analysis and stakeholder mapping, (5) developing ethical commitments and sensitivities, (6) metaevaluation training, and (7) applying model, theorists, and conceptual distinctions. Patton summarizes the issue by stating that

This volume on using cases for teaching evaluation aspires to contribute to professional excellence in evaluation by grounding training real-world experiences captured and presented in detailed cases. Case teaching and the additional practice-oriented teaching ideas presented in this chapter seek to bridge the gap between knowing and doing.

(p. 98)

As a student of evaluation I found “Teaching Evaluation Using the Case Method” a compelling, logical approach to teaching and learning evaluation. Each of the cases presented in Chapters 2-4 offer a unique series of problems and possibilities. Furthermore, I found Patton’s presentations of teaching guidelines and questions at the end of these chapters useful and relevant to the cases presented. While I agree with Patton that evaluation teaching and training needs to “bridge the gap between knowing and doing” (p. 98), there are alternatives to cases which should be considered as well. For example, cases may in fact be “real-world,” but the use of the case is still “hypothetical.” That is, learners are not really evaluating the programs or projects presented in the cases. They may be confronted with the complexities and problems of real-world evaluation, but real-world practice should include “real” evaluation as opposed to merely practicing on cases. Although cases are an invaluable teaching tool, I would argue that what many professional programs of study call “field or professional experience” would be the real, real-world equivalent of cases.

References

Patton, M. Q. & Patrizi, P. (Eds.) (2005). Teaching evaluation using the case method. *New Directions for Evaluation*, 105.