Marketing Evaluation as a Profession and a Discipline

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It can be a bit like pushing sand uphill with a pointy stick, as they say here in New Zealand. One of the great challenges in developing evaluation as a discipline is getting it recognised as being distinct from the various other disciplines to which it applies. In this piece, I offer a few reflections on the challenges with this, recount a story where a group of practitioners from outside the discipline actually sat up and took notice, and propose some possible solutions for moving us forward.

It's all very well for us to come together in our evaluation communities around the world and talk to each other about our unique profession. Not that there isn't a lot to talk about. After all, we are still working on building a shared understanding of what it is exactly that makes evaluation distinct from related activities such as applied research and organisational development. But with a little more application, I am hopeful we can persuade enough of a critical mass to call it a reasonable consensus.

Meanwhile, it seems to me that a more difficult yet equally important task is to articulate clearly to the outside world—to clients and to other disciplines—what it is that makes evaluation unique.

Right across the social sciences and in many other disciplines where evaluation is relevant in more than just its intradisciplinary application, it seems that the vast majority of practitioners consider it to be part of their own toolkit already, albeit

often under a different name. Most of these practitioners consider evaluators delusional when we suggest that evaluation is sufficiently distinct to call a profession, let alone an autonomous discipline.

Here's a fairly typical response, in this case from an industrial/organisational psychologist:

> [A] discipline evaluation is not. Disciplines are systematic, coherent, founded more often than not on sound theory, and offered as programs in accredited colleges, universities, and professional schools. Evaluation, without detracting in the least from its multitude of contributions and creative authors and practitioners, is not systematic, coherent, theory-driven, and offered—oh perhaps with an exception here and there—as a program of study at institutions of higher learning. Evaluation is a helter-skelter mishmash, a stew of hit-or-miss procedures, notwithstanding the fact that it is a stew that has produced useful studies and results in a variety of fields, including education, mental health, and community development enterprises.[1]

Industrial and organisational psychology is a relatively young discipline itself, but obviously not quite young enough for its practitioners to recall the struggles they must have had in the late 1800s and early 1900s. Industrial psychology, which focuses primarily on personnel selection and ergonomics/human factors, grew out of a blend of industrial engineering and experimental psychology. The first doctoral degrees in industrial psychology did not emerge until about the 1920s.

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[1] For the full article, see R. Perloff's (1993) "A potpourri of cursory thoughts on evaluation."

It seems likely to me that the fledgling discipline of industrial psychology had its share of critics in those days. Perhaps it was even called a "helter-skelter mishmash." There was probably a lot of dissent in the ranks as to whether it really was any different from industrial engineering, measurement, experimental psychology, and a host of other disciplines. And I am sure there were furious debates about the definition of industrial psychology itself.

Was it (or would it have been) reasonable to declare industrial psychology a discipline even though most insiders didn't agree on its definition, underlying logic, or the soundness of its theories? How much shared understanding constitutes a critical mass?

There's something of a "chicken and egg" argument here. It seems to me that little progress in theory or practice can be made beyond a certain point without first declaring evaluation to be a discipline and then seeing what develops. Sure, not everyone will buy the idea initially, but there's no point being put off by those who like to throw their hands in the air and declare the whole exercise impossible. These things take time, open minds, thinking and rethinking.

Whether or not we have the courage and conviction to declare ourselves a discipline at this point, I think it's fair to say we have a critical mass who are quite clear that evaluation is at least a professional practice with a unique skill set that is honed with reflective practice and other forms of learning. The challenge here is convincing non-evaluators (such as the I/O psychologist quoted earlier) of this.

Consultants are a particularly hard nut to crack. Often trained to the graduate level in business and/or the social sciences, the almost universally held perception is that all one needs to do evaluation is some content expertise and perhaps a few measurement skills (and accounting skills).

What could possibly make seasoned professionals such as management consultants sit up and take notice of evaluation?

Let me set the scene. A client organisation had put out an RFP asking for an independent evaluation of a leadership initiative. Interestingly, the RFP specifically stated that the client was looking for an evaluation expert with content expertise rather a content expert (e.g., a management consulting or industrial/organisational psychologist) with evaluation experience. This is very unusual in the evaluation of leadership initiatives. Most clients are unaware that there is such a thing as evaluation expertise, as distinct from the applied research skills a well-qualified management consultant or organisational psychologist might possess.

Of 22 initial expressions of interest in the contract, just two (yes, 2!) of these were from people who identified as evaluators and participated actively as members of the [national and international] evaluation community. This was despite unusual efforts on the part of the client to attract expressions of interest from evaluators. Rather than simply posting the RFP on the usual electronic bulletin boards, which they had heard good evaluators do not usually respond to, they also sent out direct emails to evaluators who had been recommended by other evaluators and had the notice posted on an evaluation listserv.

[It is interesting to note that the process used by the client to specifically target evaluators closely mirrors best practice for the recruitment of top-notch job candidates, especially underrepresented groups—don't just use the regular channels that yield the same old candidate pools; go to where you know the right people are and personally encourage them to apply.]

The client in this case, under the guidance of an evaluator not bidding on the job, used a creative and unusual process to select the contractor. Rather than asking

shortlisted bidders to submit the usual 20-page proposal, the selection team invited them to a face-to-face meeting where they could present their thoughts on the evaluation. This was because credibility was a key element of the evaluation, which the client felt couldn't accurately be gauged without meeting the evaluator face to face.

An added benefit of the face-to-face interview approach was that it increased the odds of both attracting and identifying a "real" evaluator. In a small community such as New Zealand, the vast majority of evaluators are solo practitioners who often partner with others for particular pieces of work. As such, they have inadequate resources to devote to compiling lengthy, slickly presented proposals that have less than an even chance of being successful. In contrast, larger consulting firms who do *not* have evaluation as their primary function are far more likely to have an extensive library of proposal templates and a number of junior staff trained in writing proposals. Therefore, the standard written proposal solicitation process is far more likely to yield bids from content experts than from evaluators.

Prospective contractors were asked to submit a number of supporting documents for the interview, including an outline of their "quality assurance procedures." The proposed quality assurance procedures turned out to be one of the more telling pieces of information. After all, what better way to understand an evaluator's grasp of his or her profession than to ask how his or her work should itself be evaluated? One case in point was a large, multinational business consulting firm ("Firm X") whose quality assurance procedure consisted of appointing one of their independent auditors to oversee the evaluation.

In the final round, only the two "actual" evaluators passed the interview process and made it onto the final short-shortlist for being awarded the contract. When the final decision was made, the runner-up was told the background and qualifications of the successful bidder—and immediately recognised who the competitor was (New Zealand being a small evaluation community). By chance, the two met up a few days later and had a chuckle when they finally connected the dots.

In contrast, Firm X was, by all accounts, extremely surprised not to make even the final short-shortlist of two. To their credit, they did send a junior employee to see the client to get feedback about why their bid had been unsuccessful. They were even more surprised to be told that the main reason was because they were *not evaluators*. And no, "audits" and "reviews" of the type they were well versed in were not the same as high-quality evaluations. The consultants from Firm X were flummoxed!

Firm X asked who had been awarded the contract to evaluate the leadership initiative, and were told. They then asked who the runner-up was. The client quietly pointed out that, if they really were evaluators (as they claimed to be), they would already have found that out through their extensive evaluation networks—in the same way as the top two contenders had found out about each other.

There is a wonderful lesson here for evaluation as it strives for recognition as a distinct profession and as a discipline. I think we've all tried convincing the colleagues in our content disciplines that what we do is unique, complex, more than just measuring a couple of variables of interest, and something worth paying attention to. And every now and then we get a breakthrough with our evaluation evangelising. But the reality is that evaluation-savvy clients will likely sell us more

converts among this audience than we could possibly manage for ourselves. There is nothing quite like being denied a contract for not being an actual evaluator!

What are some of the strategies we can use to educate clients? The simplest one that comes to mind is to highlight in our work what it is we are doing that is unique to evaluation. This might be serious and systematic attention to utilisation issues, the application of evaluation-specific methodologies not known to our non-evaluator colleagues, or the use of frameworks and models that have been developed specifically for evaluation. Whatever it is, we should be sure to highlight it in a way that makes it easy for a client to tell a "real" evaluation from the rest.

A second client education strategy is to seek opportunities to help with the development of evaluation RFPs. This was the case in the organisation I described, and it made a very substantial difference to how well the task was outlined, the selection criteria, the quality of the selection process, and client satisfaction with the outcome. Although the organisation was constrained by regulations about how an RFP process could be managed, good evaluative thinking allowed individuals within the organisation to generate a creative solution that led to the right result.

The third strategy for spreading the word about evaluation would be to follow the example of the Society for Industrial and Organizational Psychology (SIOP) in the States. Like us, I/O psychologists also have trouble getting the general public (especially managers in organisations) to understand what it is they are particularly skilled to do. In response to this need, SIOP has developed an extremely simple and straightforward leaflet, which it sends to members for distribution to managers they know. The goal was to have each member distribute the leaflet to five

managers. A copy of the leaflet may be viewed online at http://siop.org/visibilitybrochure/siopbrochure.htm

It is likely that by directing our educational efforts outwards toward clients, we will have the side effect of creating some better clarity within the evaluation profession, which will in turn let us make better sense to the outside world.