

Values and Valuing in Evaluation: A Review of Recent Survey Findings

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What do I mean by ‘values’ and ‘valuing’?



Values are deeply held convictions, principles, and/or beliefs that guide actions and inform decisions. These can be seen in professional codes of conduct, for example.



Valuing is the process of making value judgements. It can be seen in statements such as, “this program should be expanded,” or “this intervention was successful.”

How do they relate to evaluation?



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extrinsic value

The logistics....

- Non-probability survey that used a snowball sampling technique
 - ✓ Local and national professional organizations
 - ✓ Graduate programs offering evaluation courses, certificates, concentrations
 - ✓ University-based evaluation centers
 - ✓ LinkedIn
- Piloted survey but it's not a validated instrument
- 14-20 open and closed-ended questions, depending on responses
- Experience, education, and attitudes about values and valuing in evaluation. A major gap in the existing evaluation literature.
- Eligibility: Currently in the USA *and* completed an educational opportunity on evaluation in the USA (e.g., course, workshop)



Who completed the survey? (n=311)



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- 42% PhD
- 14% Bachelor's or less

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79% had an opportunity to learn about evaluation in their program.

Who completed the survey? (n=311)



63% of survey respondents identified as having two or more professional identities.

71% practicing evaluator

47% lifelong learner of evaluation

30% support evaluations

20% teach evaluation

19% graduate or undergraduate student

15% conduct RoE

3% former evaluator

Who completed the survey? (n=311)



Survey respondents completed a variety of educational opportunities in evaluation **with respondents completing a median of 4 opportunities.**

78% course offered at institute of higher ed

76% professional conferences or learning opportunities

69% workshop

68% open-access resources or webinars

59% mentorship with an evaluator

41% professional training program

19% internship/fellowship w/evaluation organization

9% evaluation-specific mentorship program

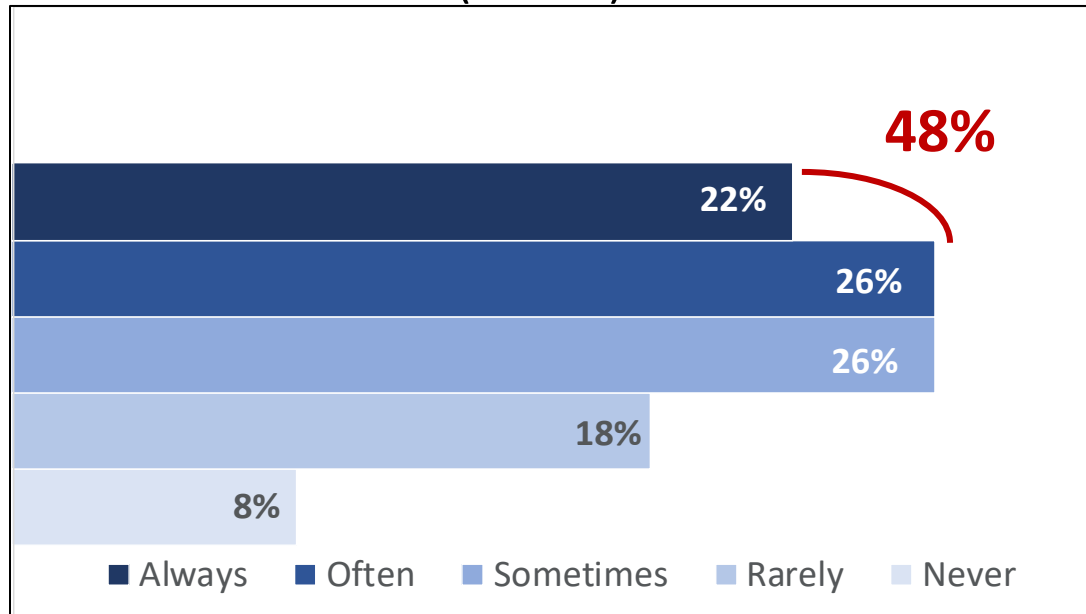
Values and valuing in practice



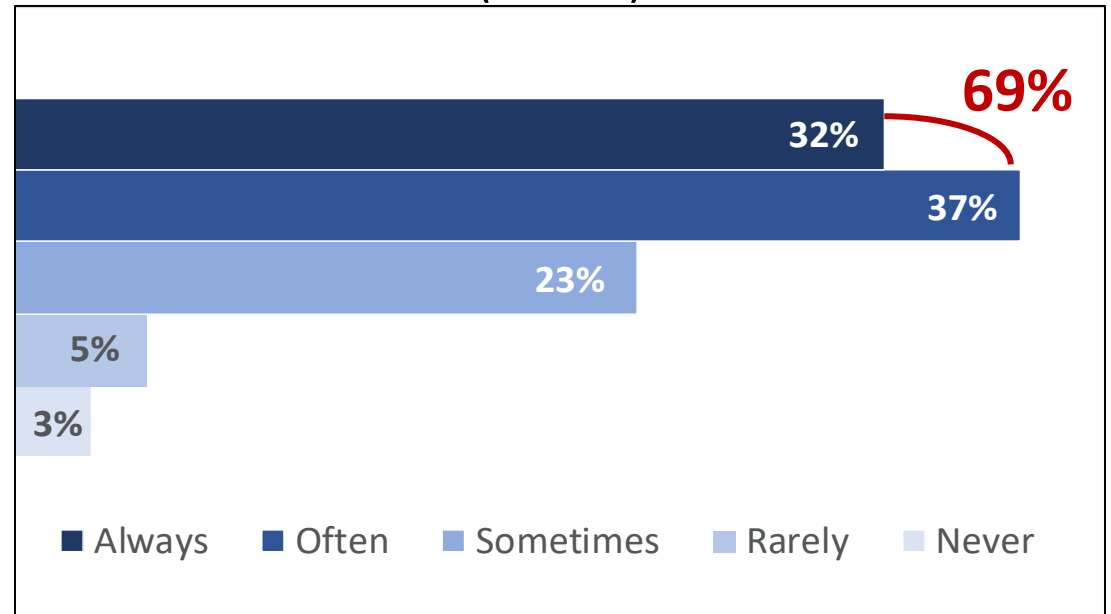
Values and valuing in practice

Practicing/former evaluators **spoke with clients more frequently about program or organizational values** than their values as an evaluator.

Frequency discuss your values as an evaluator
(n=231)



Frequency discuss organization's or program's values
(n=231)



Values and valuing in practice

62% of evaluators **frequently engaged in valuing in their practice.**

How often do you engaging in valuing (i.e., make value judgements)? (n=231)

20% Always

42% Often

29% Sometimes

8% Rarely

1% Never

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Responses viewed making value judgements as systemically connected to the field's identity and their professional identity, in addition to making judgements because others' expect them or ask for them. They also recognize values are embedded in everything, even when judgements aren't being made.

“If we aren't making value judgments (or facilitating that process) when we do evaluation, it ain't evaluation.”

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Also acknowledges values are part of the field's identity, but place greater emphasis on value judgements being requested, in addition to seeing values as inherent to the evaluation process.

Responses also note why valuing doesn't always occur: evaluation has other purposes (e.g., ECB, decision making) or the evaluation approach and design doesn't facilitate it.

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The primary reason valuing didn't happen was that the evaluation approach or design did not facilitate it. Situational reasons were also provided: timing of evaluation, deliverables asked for, and someone else responsible for valuing.

More philosophical perspectives about why not to engage in valuing--- value judgements aren't the role of the evaluator, and they are of little utility.

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Primary reason for not making value judgements is that the design doesn't facilitate it. Other reasons included: client doesn't request it, it's not wanted, the respondent's role on the team isn't to make judgements.

However, some responses do note the inherent nature of values to the evaluation process and other purposes evaluation, such as ECB.

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No write-in responses provided!

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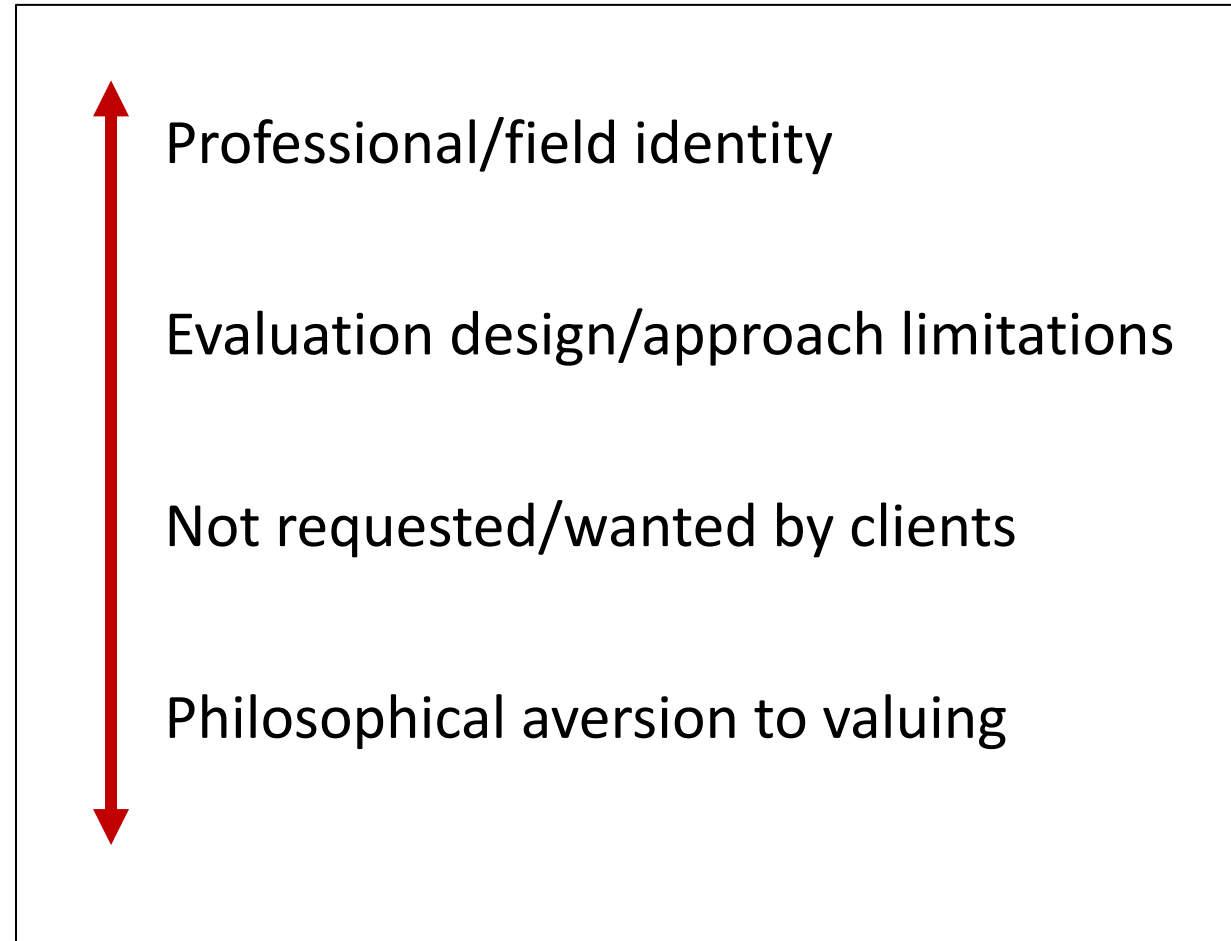
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Values and valuing in practice

Evaluators reported using a **median of 3 tools/techniques to make value judgements.**

- 71% Developing/use evaluation criteria and standards
- 63% Specific evaluation approach or theory
- 42% Synthesis techniques (e.g., qualitative weight and sum)
- 40% Needs assessments
- 37% Cost analyses
- 21% Ethical frameworks
- 8% Other
- 3% Did not use any tools/techniques



Knowledge about values and valuing in evaluation

Knowledge about values and valuing

Respondents reported that most evaluation educational opportunities that they completed discussed working with values, but how they were discussed and to what extent is unknown.

Were ways to identify, address, and/or incorporate values in an evaluation addressed in this opportunity?	Yes
Evaluation-specific mentorship (n=29)	83%
Professional organization learning opportunities and/or conferences (n=235)	80%
Formal/informal mentorship with an evaluator (n=185)	78%
Courses offered at institute of higher ed (n=243)	71%
Internship or fellowship with an eval organization (n=60)	70%
Professional training program (n=128)	63%
Workshop (n=214)	61%
Open-access resources/webinars (n=212)	56%

Knowledge about values and valuing

Respondents were **most familiar with AEA's Guiding Principles** followed by AEA Evaluator Competencies and JCSEE.

Joint Committee on Standards for Educational Evaluation (n=311)

AEA Guiding Principles for Evaluators (n=311)

AEA Evaluator Competencies (n=311)

48%	{	22% Extremely familiar	{	35% Extremely familiar	{	32% Extremely familiar
		26% Familiar		38% Familiar		38% Familiar
		17% Somewhat familiar		15% Somewhat familiar		15% Somewhat familiar
		14% Slightly familiar		9% Slightly familiar		10% Slightly familiar
		21% Not at all familiar		3% Not at all familiar		5% Not at all familiar

Knowledge about values and valuing

The range of survey respondents who reported being extremely familiar or familiar with core evaluation tools/techniques varied widely. Respondents were less familiar with more specific tools/techniques (e.g., Scriven's Key Evaluation Checklist, Value Identification Matrix (VIM), and Schwartz's theory of basic values).

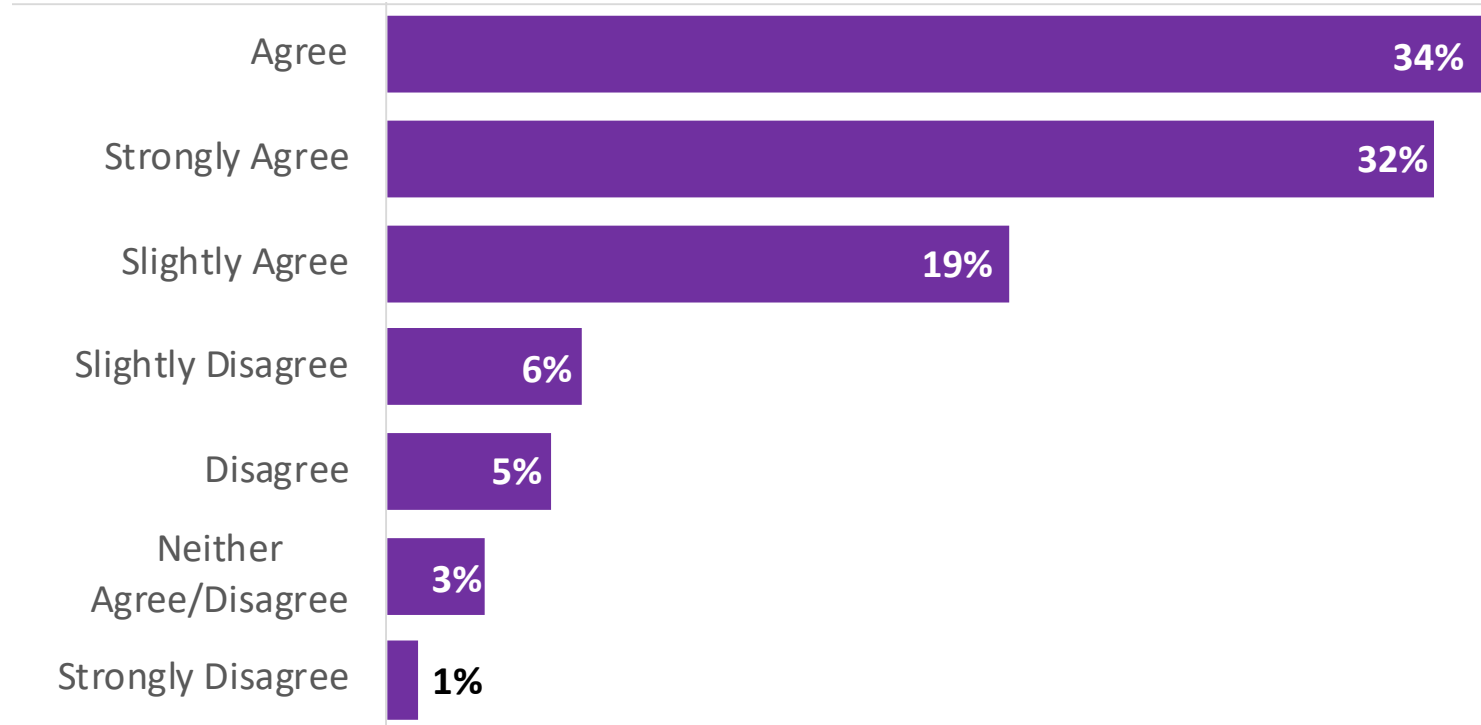
	Extremely Familiar/Familiar	Slightly Familiar/Not at all Familiar
Creating/using evaluation rubrics (n=311)	79%	11%
Evaluation synthesis techniques (n=311)	64%	19%
Descriptive valuing approaches (n=311)	63%	15%
Prescriptive valuing approaches (n=311)	51%	26%
Cost analyses (n=311)	38%	35%



**Attitudes about values
and valuing in evaluation**

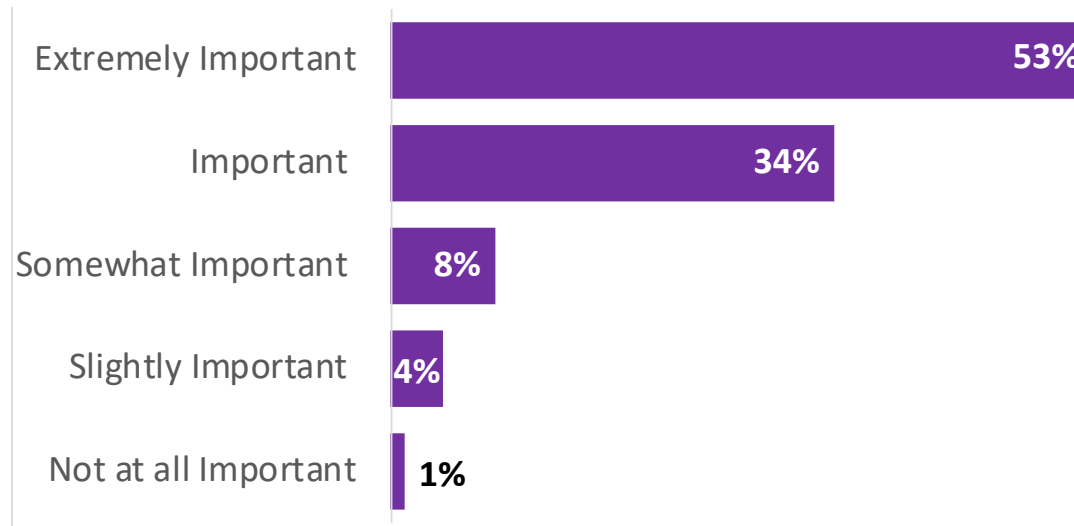
Attitudes about values and valuing

Most survey respondents (n=264) expressed some level of agreement with Scriven's definition of evaluation.



Attitudes about values and valuing

A majority of survey respondents reported that it was extremely important or important for evaluators to learn how to work with values.

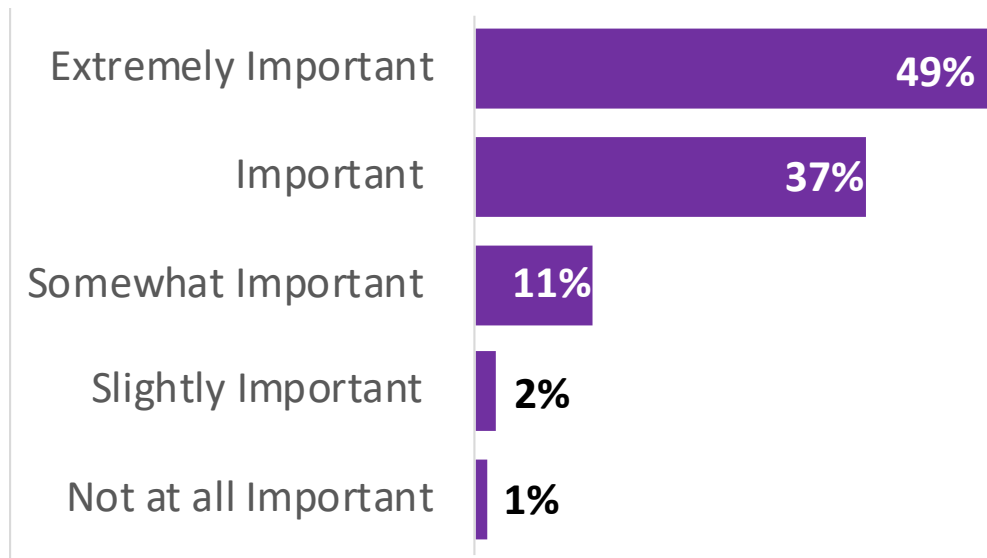


The most common themes of why it's important to learn about values included:

- Core of the field, quality, and purpose of evaluation (30%)
- Need to understand your values to know how they impact your work (17%)
- Values are universal (15%)
- Evaluation is/should contribute to social betterment (14%)

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The most common themes of why it's important to learn about valuing included:

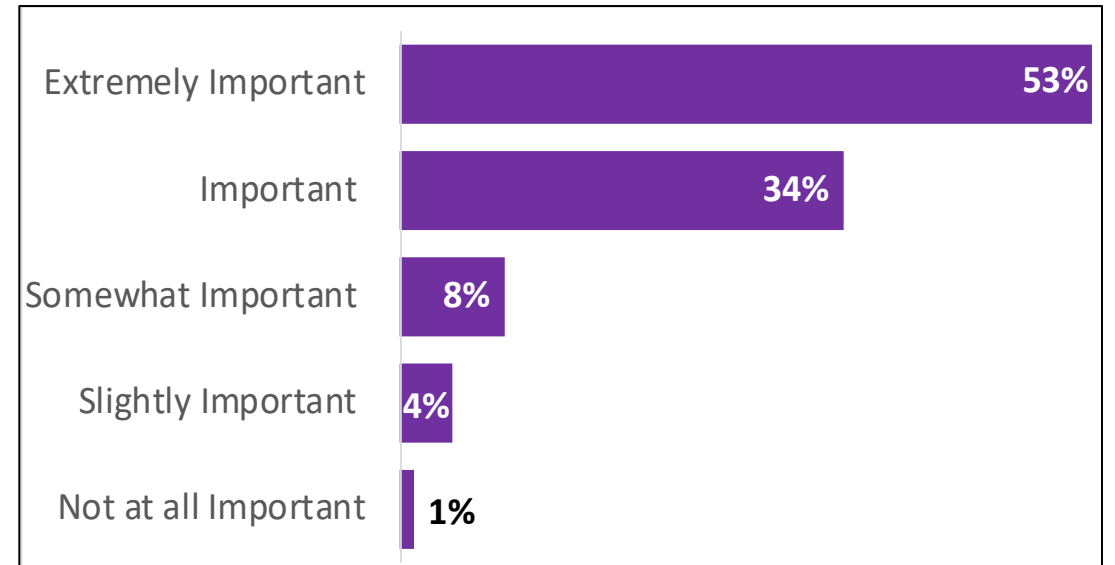
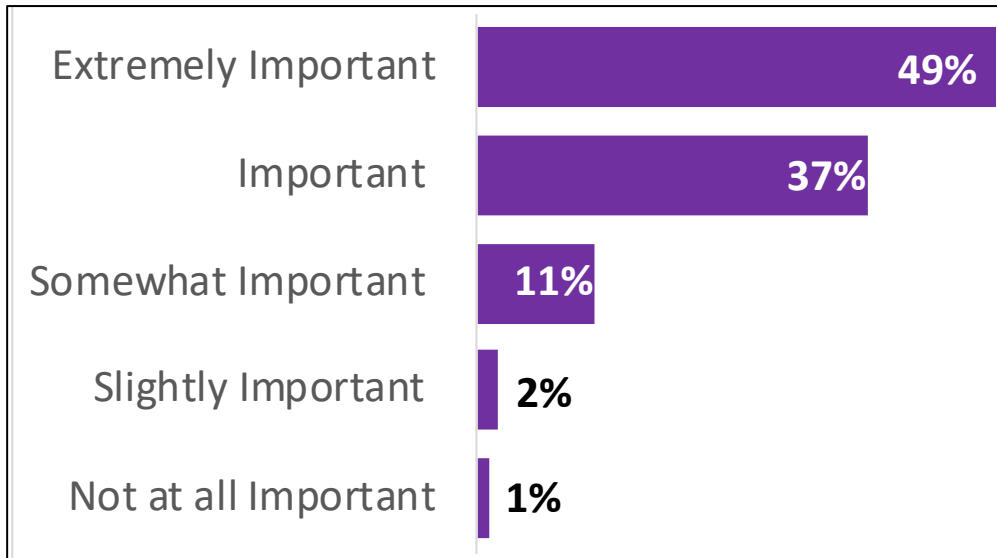
- It is core to the field and judgement (33%)
- Forces evaluators to deal with other components critical to evaluation, such as making values explicit (17%)
- Did not understand difference between values and valuing (13%)
- It's important to learn in order to control bias (8%)

Attitudes about values and valuing

Importance of learning about valuing



Importance of learning about values



Survey Limitations

- Cannot generalize findings beyond this sample (but was not the point!)
- Conflating values and valuing?
- Additional questions about respondents' knowledge would help strengthen interpretation and understanding
- The role of respondents' specific contexts on their answers is unknown

Come see me at the 2023 AEA conference!



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