

Conclusion

From:

Kylie Hutchinson (2019). *Evaluation Failures: 22 Tales of Mistakes Made and Lessons Learned*. Thousand Oaks: Sage, pp.157-166.

The stories in this book illustrate that mistakes and failures can occur at every stage of the program evaluation process. I am grateful to each and every contributor in this book for their willingness to share experiences that I suspect were likely very upsetting and stressful at the time.

Despite the uniqueness of each author's situation, the difficulties they encountered were often similar. When I first envisioned this book, I imagined that many of the failures would involve complications with data collection. Although this definitely was the case for Bisgard and Selvaggio, Noga, and Snyder, there were shared mistakes in other areas, too.]

One of the most common problems experienced was having to manage the (sometimes conflicting) desires and expectations of program staff and clients. Archibald, Barrington, Bisgard and Selvaggio, Lovato, O'Reilly, Muramutsa, Newhouse, Shepherd, Steinberg, Tindall, and Williams all found themselves walking a version of Mohan's tightrope of evaluator responsiveness versus independence. Using participatory approaches and being attentive to client or stakeholder needs while also maintaining independence is a struggle we often face in this profession. Being able to communicate and negotiate both effectively and proactively are essential for navigating these occasionally rough waters.

Another common stumbling block was engaging clients and stakeholders in ways appropriate to the evaluation context. For Archibald, Lovato, Preskill, and myself, excluding certain clients and stakeholders was an oversight. For Muramutsa, it was a more challenging dilemma of balancing one stakeholder's wishes against the other. For Castillo and Igras, stakeholder complications were the result of subtle cross-cultural issues. In Steinberg's case, it was a challenging issue of trying to find a good "fit" between a group of stakeholders and oneself as the evaluator. As evaluators, we have long understood the importance of engaging stakeholders, but sometimes achieving this in practice can be more difficult than it seems.

Barrington, Davidson, Dean-Coffey, and Newhouse each had to deal with changes in scope that significantly affected their original evaluation plan. Evaluation clearly does not occur in a static environment. However, it is usually necessary to define the scope of an evaluation at the outset and develop some form of an evaluation plan. Although the advent of developmental evaluation provides us with a more flexible approach, it is important to note that even Michael Quinn Patton acknowledges that it is not an appropriate method for all evaluation scenarios. In addition, the rigid procurement process of many organizations often discourages the use of developmental evaluation. Finding the balance between planning for an evaluation while also remaining fluid and responsive to inevitable changes, all within budget, will continue to be a delicate task for evaluators, particularly external ones. Suggested safeguards such as shorter term contracts, contingency budgets, and timeline buffers are very useful options to consider.

Barrington, Davidson, Dean-Coffey, and O'Reilly experienced unexpected turnover in program management and other personnel that negatively affected the progress of the evaluation. In retrospect, these changes were usually a major warning sign to the evaluator. Although we cannot always predict these events, we can learn to at least expect them and be prepared to spend the extra time required to orient new personnel to the evaluation.

Finally, Barrington, Bisgard and Selvaggio, Castillo, Gauthier, Igras, O'Reilly, and Tindall realized the important role that context plays in informing all aspects of an evaluation. Equally important, Evergreen learned to embrace her failures and develop a thicker skin.

Although many of the authors' lessons learned are situation-specific, several common themes emerge across chapters.

It is probably no surprise that many of the lessons learned emphasize the importance of engaging clients and stakeholders appropriately at multiple points in the evaluation. Even when you think you have, maybe you actually haven't. Castillo reminds us to engage all stakeholders in the development of data collection instruments, and Preskill and Tindall advocate for participatory data analysis parties. Both of the stories from Lovato and myself remind us that when developing items such as logic models and system maps, it is the people and the process that are more important than the product.

Another lesson is the need to reflect on the context of a program and its evaluation. Barrington, Gauthier, and Tindall now view programs as part of a larger and constantly changing context that can strongly influence an evaluation. Castillo notes you can have small local contexts within larger program contexts. Igras advises evaluators to research the political, social, and historical context of a country to better engage stakeholders. O'Reilly recommends understanding more clearly the context behind an organization's motivation for evaluation. Finally, Mohan and Newhouse suggest we take some time to walk in the shoes of our clients and stakeholders to better understand how their reality can influence the course of an evaluation project.

Many of the stories told underscore the need for evaluators to communicate effectively. Excellent communication is instrumental for managing and aligning expectations, troubleshooting minor issues, and building trusting relationships. Archibald now listens to his instincts and communicates any concerns immediately. Barrington ensures she has a direct line of communication with key stakeholders. Mohan uses communication to double-check his assumptions and to surface any potential problems.

For O'Reilly, Shepherd, and Snyder, perhaps the hardest lesson for any evaluator was learning to trust their instincts and know when to pull the plug on an evaluation.

Avoiding these failures and judgement errors often requires the "soft" skills of evaluation, such as interpersonal skills, effective communication, negotiation, and self-care. There is definitely more to being an evaluator than simply mastering the technical skills. Unfortunately, soft skills cannot always be taught in a classroom. They often come from experience, and occasionally that experience is negative. However, trusted mentors can play a valuable role in assisting new evaluators as they find their way.

Virtually all evaluations will face setbacks of one kind or another. Some will have more than others, and some are more serious than others, but most do not end up as epic failures. And not all failure is a bad thing. The most valuable lessons come from our mistakes, which over time inform better practice, as awkward as they may have been at the time. For example, Lovato's failure to engage an important stakeholder initiated a process that resulted in a stronger relationship overall.

Reading this book will not make you immune to failure or blunders, but hopefully, learning from others will make you more comfortable with the fact that mistakes occur. We are often our own

toughest critics, especially with the benefit of 20/20 hindsight. But even the most experienced evaluators are prone to errors, and they have become better practitioners as a result.

Change happens, and evaluators cannot anticipate or control everything in an evaluation project. But we can learn to expect the unexpected. If there is an antidote to failure, it is having a strong reflective practice that helps us to identify and manage minor challenges before they turn into full-blown blunders. The need for reflection surfaces again and again in these stories. As Williams advised, if you are struggling with self-reflection, seek the advice of mentors and colleagues who have likely wrestled with similar issues.

As reflective evaluators, we are always learning. In fact, since starting this book over a year ago, I have experienced at least one new bungle that I am still processing. I am sure I'm not alone.

When you are ready, I invite you to come and join us. Take your failures out of the closet and wear them proudly so that others can learn from them. It is our responsibility as evaluators to lead by example.

Kylie Hutchinson

Editor