

How Far Dare an Evaluator Go Toward Saving the World?: Redux, Update, and a Reflective Practice Facilitation Tool

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Abstract

In 2004, Robert Stake published a provocative article that asked: “How Far Dare an Evaluator Go Toward Saving the World?” This question raises the issue of what role evaluators’ values play in the conduct of evaluations. Following review of Stake’s premises, I present value statements from a diverse group of 40 evaluators working with philanthropic foundations. The results update and revise Stake’s list of “six advocacies common in evaluation.” The findings capture changes in evaluation language and substantive concerns over the last 15 years regarding evaluators’ values and engagement. The conclusion affirms Stake’s original overarching principle. In closing, I offer an additional concern toward saving the world not on Stake’s list or that of the evaluators sampled: global sustainability and environmental justice in the face of the global pandemic and climate emergency. This process of inquiry generated a facilitation tool for use by evaluators, presented here, to support reflective practice about evaluators’ values.

Keywords

values, advocacy, equity, sustainability, diversity

Redux, from the Latin verb, *reducere*, means “to bring back.” *Fortuna Redux* in ancient Rome meant to bring back luck. *Evaluation Redux*, in our contemporary context, means to bring back, revisit, and update a classic. The classic in this case is Robert Stake’s provocative article published in the *American Journal of Evaluation* in 2004 that asked: “How Far Dare an Evaluator Go Toward Saving the World?”

This question focuses attention on the effects of evaluators’ values on how evaluations are conducted. Facilitating clarification of stakeholders’ values as a foundation for designing and enhancing use of evaluations constitutes one dimension of valuing in evaluation, one that has received a great deal of attention and is addressed explicitly in the Joint Committee Program Evaluation Standards.

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Explicit Values Evaluations should clarify and specify the individual and cultural values underpinning purposes, processes, and judgments. (Yarborough et al., 2010, Standard U4)

Stakeholders' values figure prominently in adhering to this standard, but the second dimension of valuing concerns what role evaluators' values play. That is the focus of this review and update. I have long used Stake's article in workshops and speeches to introduce discussion of evaluators' values and stances toward valuing, including a plenary presentation at the 2010 American Evaluation Association (AEA) Annual Conference. I introduced Stake's article in *Utilization-Focused Evaluation* to discuss how methods decisions are affected by the evaluator's values (Patton, 2008, pp. 451–452). Then, in 2019, an unusual opportunity arose to expand the use of his article as a basis for inquiry into the values of an important group of evaluators and, as a result of that inquiry, create a tool for evaluators' reflective practice around values that others may find useful, thus this article.

I will begin by briefly reviewing the centrality of values in the conduct of evaluations, then present Stake's premises about values. That will set the stage for considering statements from a diverse group of 40 evaluators, representing a range of backgrounds and evaluation specializations, about how they would update and revise his list of "six advocacies common in evaluation studies," that is, his formulation of the things evaluators, in general, care about—and because they care about them, those things are inevitably infused in and affect how evaluators conduct evaluations. I'll comment on the nature, scope, and implications of the values these evaluators expressed, including what I found missing, and close by offering my own value premises about how evaluators can help save the world, which, it turns out, badly needs saving given the global pandemic and the looming climate change emergency. The article concludes with a tool for reflective practice about values generated through the inquiry herein described.

Values and Valuing

Before reviewing Stake's approach to evaluators' values and data about their values from a group of contemporary practitioners and evaluation leaders, let me place the issue of valuing in a larger context. Values and valuing are a constitutive link between evaluation theory and practice with substantial literature devoted to the theory of valuing and the role of values in practice. Michael Scriven pioneered treating evaluation as the "Science of Valuing" (Shadish et al., 1991, p. 74). His writings over the years have consistently attacked the fallacy of value-free science (e.g., Scriven, 1991, 1993, 2003, 2004, 2013, 2016). In their classic *Foundations of Program Evaluation: Theories of Practice*, Shadish et al. (1991) examined evaluation as a methodological specialty and a profession of practice. They identified five fundamental issues that are the basis of evaluation's disciplinary body of knowledge, one of which was *valuing*. House and Howe (1999) made values the core of democratic deliberative evaluation. Cram et al. (2018) have examined how indigenous values can and should inform evaluation. Acknowledging and honoring diverse values is central to culturally responsive evaluation (Bowman & Dodge-Francis, 2018; Thompson-Robinson et al., 2004) and *Tackling Wicked Problems in Complex Ecologies* (Hopson & Cram, 2018).

Jennifer Greene, as AEA president, chose for the 2011 annual conference theme: *Values and Valuing*. Among the questions she posed for inquiry and deliberation were the following:

- How can evaluators be forthright and transparent about the values being promoted in their work?
- How do values show up in evaluation methodologies and analyses?
- How is the process of valuing enacted in evaluation's design, implementation, and utilization?
- What responsibilities do evaluators have for advancing a valuing of evaluation itself in society? (Greene, 2011).

As Montrosse-Moorhead (2019) has observed, “*who* gets to decide what values are privileged is an important discussion that has been taking place for a long time within evaluation” (p. 610, emphasis in the original). Julnes (2012) edited a volume on *Promoting Value in the Public Interest: Informing Policies for Judging Value in Evaluation* in which he expressed concern about the sufficiency and quality of evaluators’ understanding of and engagement with valuing. Schwandt (2008, 2015) has been an evaluation thought leader in ensuring that value considerations are front-and-center in all aspects of evaluation so that the profession does not devolve into and masquerade as a purely technical and methodological enterprise. *Facilitating Evaluation* (Patton, 2018) includes guidance on how to help stakeholders make their values explicit and use those values in framing and prioritizing evaluation questions and interpreting findings. Brighouse et al. (2018) published a book-length argument that *morally responsible* decisions combine values and evidence, leading them to explore the critical nature and role of values in evaluation at great length. Values expressed as principles are the foundation of a *Pedagogy of Evaluation* (Patton, 2017) which is concerned with how and what evaluation teaches.

One of the three branches on Alkin’s evaluation theory tree is *valuing* based on epistemological perspectives related to valuing in the evaluation process. (The other two branches are use and methods.) At the base of the valuing branch are Michael Scriven and Robert Stake, “both of whom significantly influenced the field in terms of its conceptual underpinnings and procedures” (Alkin, 2013, p. 31).

Review of Stake’s Position on Evaluators’ Values

Robert Stake was the Director of the Center for Instructional Research and Curriculum Evaluation, University of Illinois, 1975–1997. He has been a pioneering leader in development of program evaluation methods for decades (Stake, 1995, 2010). He received the Paul F. Lazarsfeld Theory Award in 1988, “presented to an individual whose written work on evaluation theory has led to fruitful debates on the assumptions, goals, and practices of evaluation.” His article asking how far dare an evaluator go toward saving the world exemplifies the Lazarsfeld criteria (for more on Stake’s contributions, see Miller et al., 2015; Stake, 2016). Our focus here is on his views about evaluators’ values and their effects on the conduct of evaluations.

Stake (2004) opened his ruminations on “How Far Dare an Evaluator Go Toward Saving the World?” with his perception of evaluators and the state of the profession circa 2004.

Professional evaluators come from many backgrounds. They have greatly different aspirations. As a group they are considerate people. They are ethical. They follow disciplined procedures to find the merit and worth of a program or other object. Oh, there is a rogue here and there. He or she may go where the money is. But most of us evaluators are good people, most of the time. We are specialists at recognizing differences among greater and less quality. We hope that our work will contribute to the making of a better world. . . .

Most evaluators claim to make dispassionate searches for quality and dysfunction. They speak disdainfully of advocacy and promotion. Yet it is clear that most of us evaluators have strong feelings about certain matters which we promote in our work. (p. 103)

Stake (2004) then listed six “advocacies” he found common in evaluation studies. These are reproduced in Exhibit 1. He reported that evidence of these six things evaluators care about “are easy to find” in evaluators’ reports (p. 104).

Concerning what evaluators care about, Stake (2004) observed that

each of us is more than an evaluator. We are complex human beings. . . . Some of the panorama of advocacy cannot help but become part of the evaluation study, even if we try to confine it to the rest of

our life. Values and perceptions from any part of our lives may influence the interpretations we make. (p. 104)

Stake (2004) affirmed the importance of the

ethical responsibility for the evaluator to identify the affiliations and ideological commitments that might influence his or her interpretations, not only for the contractors but also for the readers of reports, and of course, for the evaluator her or himself. But there is no way for the evaluator to identify all predispositions, nor even to know them. (p. 104)

Overall, Stake (2004) was concerned that “Efforts to improve the evaluand and the world will diminish attention to the primary evaluation issues” (p. 107). He was skeptical that evaluators advocating their own values and change-oriented perspectives could do so without infusing bias into the evaluation for, he insisted, “it is impossible for the evaluator’s interpretation of findings not to be colored by any parts of his or her life and camaraderie, community, and culture . . .” (p. 106).

Against this note of skepticism about evaluator advocacies and the inevitability of evaluator bias, he concluded with what he foreshadowed in the article’s opening sentence as “a surprise ending.” Rather than urging the evaluation profession to become ever more diligent in procedures to ensure objectivity and neutrality, he asserted the inevitability of diversity and, in the end, considered it not only unavoidable but probably a good thing—on one condition: that those who commission, fund, participate in, and conduct evaluations acknowledge diversity and its implications. He even offered an evaluation principle to that effect. Here, then, in full, because both the tone and substance deserve savoring, is Stake’s (2004) surprise ending and proposal for a new diversity principle.

[M]uch will differ from evaluator to evaluator. Most of us aspire to a professional practice by which—hypothetically—all evaluators evaluating a single evaluand would produce largely the same findings. But it is not an attainable aspiration, and to force it to happen would invite disaster. Evaluators cannot help but see some things differently. Some findings will be different. Hopefully not often completely at odds, but that too, will happen. In the complex determination of program quality and accomplishment, there is no single reality we can capture. Reality is constructed by people, and people sometimes differ. When we agree on what we see, we tend to think we see correctly, but sometimes we do not. When we disagree on what we see, we tend to think one sees incorrectly, but sometimes both see correctly.

We have an evaluation practice that is influenced by the value commitments of the evaluator and a set of operating standards that imply we can attain a widely-agreed-upon picture of merit and worth. Something has to give. It could be that we should more effectively constrain our value commitments and search harder for meta-evaluation consensus, but we clearly should develop our standards and principles so that they deal better with the uncertainty and individuality of evaluating.

One of the guiding principles should say something like: It should be expected that any two competent evaluators, working together or apart, will seldom agree fully on criteria and standards, critical incidents and experience, and on the appropriateness of the evidence of merit and worth. The full use of validation, triangulation, and meta-evaluation is essential but it will not eliminate uncertainty in the evaluation findings. *Evaluators should be encouraged to “have a life” and to “have a dream” so their interpretations are enriched by personal experience. Comprehensive, idiosyncratic interpretations are small steps toward saving the world.* (p. 107, emphasis added)

The Evaluation Roundtable: Contemporary Evaluators React to Stake’s List of Advocacies

The *Evaluation Roundtable* was formed 30 years ago by Patricia Patrizi, an evaluator with the Pew Charitable Trusts who subsequently became an independent consultant. She invited philanthropic foundation evaluation directors to come together as a community of practice. Tanya Beer and Julia

Coffman of the Center for Evaluation Innovation currently serve as codirectors of the Evaluation Roundtable.

The Evaluation Roundtable is a network of foundation leaders that aims to improve evaluation and learning practice in philanthropy. Founded in 1989, the network includes leaders from over 100 foundations in the U.S. and Canada. It is a preeminent resource for information and ideas on how foundations approach evaluation and learning.

The network is based on the idea that helping people connect deeply with new ideas and with each other will speed the development and spread of solutions to evaluation challenges in philanthropy. Through joint problem solving and knowledge creation, participants join forces in making sense of and addressing dilemmas they face individually or collectively. (Center for Evaluation Innovation Roundtable, 2019)

Kinarsky (2019) studied how philanthropic foundations establish evaluation policies and found that the Evaluation Roundtable, and similar community of practice groups, has more influence than the published evaluation literature. “These meetings and groups help evaluation directors prioritize and situate developments in evaluation to their context” (p. 108).

In April 2019, the Evaluation Roundtable convened at the Margaret A. Cargill Philanthropies in Eden Prairie, Minneapolis, MN. The theme was exploring

how we as evaluation leaders—working within or with foundations—can manage change *not just defensively, but proactively and productively*. Since the Roundtable’s founding, evaluation in philanthropy has evolved substantially, with major implications for the roles, mindsets, and skills that evaluators who work with foundations now need to bring to their craft.

The 2019 convening focused on “the forces that shape evaluation in philanthropy *and what they mean for our work*.” These forces will have multiple places of origin—our own organizations, our profession/discipline, the philanthropic sector, and our broader context.

Evaluators are constantly trying to deliver value amidst change, through internal transitions (a new CEO, a strategy refresh, an update in values), or external transitions (developments in our discipline, evolving sector standards, or shifts in political dynamics). How can we effectively prepare for and manage these transitions while maintaining the quality, rigor, and value of evaluative thinking and data? (Coffman & Beer, 2019)

Innovative Format

Because evaluation consultants are responsible for a significant portion of foundations’ evaluative work, the 2019 Roundtable experimented with inviting about 50 experienced evaluation staff and consultants to join 90 foundation evaluation leaders on the second day of the convening as co-learners. The third day of the convening was entirely evaluator-focused although foundation participants were invited to stay and several foundation staff with evaluation responsibilities participated. On the third day, Thomas Schwandt, Professor Emeritus, University of Illinois at Urbana–Champaign, delivered a keynote on “Redesigning a Moral Compass for Evaluation.” Schwandt is a longtime colleague and friend of Bob Stake and also a recipient of the AEA Lazarsfeld Award for Evaluation Theory. The evaluation consultants and foundation evaluation staff then met in small groups to discuss “Transformations in Evaluation Practice in Philanthropy.” The discussion explored the implications of larger social trends for how evaluators approach working with philanthropy. The small groups were asked to consider and deliberate on the question: *What stance might we take with respect to how evaluators enter into relationship with foundations and nonprofits?*

In closing the day, I reviewed Stake's article and his list of six things evaluators care about (Exhibit 1). The evaluators were then invited to (1) react to Stake's list and suggest revisions if inclined to do so and (2) identify what *they* care about. After individually writing their own statements, they shared their "what I care about" statements in small groups and then, in closing, shared them with the whole group. (See Exhibit 2 in the Appendix for a reflective practice tool on how to implement this process for group engagement to illuminate and clarify evaluators' values.)

Who Participated and Why Their Views Matter

Forty people participated in the exercise. I collected the statements, with the evaluators' names, if they were so inclined, with the understanding that the results would be synthesized for publication. The names of the 28 contributors who chose to be identified are included in the Appendix of this article in Exhibit 4.¹ What they have in common is a great deal of evaluation experience, with 82% reporting more than 10 years working as an evaluator, 14% reporting 6–10 years of experience, and just one person with less than 2 years of experience. All but one reported being an AEA member. Three fourths were female. Racial and ethnic diversity was as follows: 46% self-reported as White/Caucasian/White non-Hispanic, 18% African American, 11% Asian/Asian American, 7% Latino/Latinx, and one each reported being Anglo, First Nation/Native American, Euro-American, and Japanese. Additional reported identities were "bilingual and bicultural" and "LGBT." The participants vary considerably in percentage of their evaluation work that is with philanthropic foundations, their contract relationships with foundations (a third are foundation staff), and beyond foundations, what other kinds of evaluation clients they work with, if any. See Exhibit 3 in the Appendix for details.

So, why should the profession pay attention to and care about the perspectives of this small select group of evaluators? The sample is small but important because these evaluation consultants and foundation evaluation staff constitute a highly competent, successful, experienced, and influential group of evaluators. They work in or consult with major philanthropic foundations who place confidence in their competence and have a great deal at stake in whom they choose to do evaluation. Many of these evaluators are active in the profession—and they want to influence the future direction of the field. In a follow-up survey of those who included their names on their responses ($n = 28$), 71% reported being "very active" in attempting to influence the future direction of evaluation within their arena of engagement and employment; all others reported being at least "someone active."

From working with them, my impression of these evaluators is that they are both influenced by the philanthropic sector in which they consult and they influence that sector by the important positions they occupy and work they produce. Thus, I would suggest that these results tell us how some of the top evaluation practitioners think about evaluation and what they care about—and how they are working to affect the evaluation profession.

To test this impression, I asked colleague, Tom Schwandt, how he viewed this group. He has had a distinguished career as a professor at the University of Illinois, teaches evaluation, and consults with a wide variety of groups. In my judgment, he is an astute and forthright judge of evaluators. As noted earlier, the day began with his keynote to the group on "Redesigning a Moral Compass for Evaluation." He stayed for the full day and both observed and participated in the subsequent discussions and exercises. I asked him to assess the group for use in this article.

Here are my thoughts on why I think a portrait of how the roundtable participants viewed advocacies when prompted by Stake's paper is important:

Philanthropies are major players in social problem solving and social change initiatives and the Evaluation Roundtable (RT) brings together evaluation officers from several of the major philanthropies that have a strong commitment to evaluation. What I found remarkable about the RT gathering I attended in 2019

was, first, that those present clearly constituted a community of practice. It was not simply a collection of individual evaluators but a genuine community with a common bond and shared interest (and shared tools and ideas) in enhancing and shaping the value of evaluation to decisions about the strategic direction and added value of the philanthropies for which they worked. Second, within that community of practice, I witnessed a strong and deep commitment to evaluation as a means of contributing to the improvement of the lives of individuals and communities (in education, housing, health care, etc.) with a profound concern with issues of equity and social justice. The field of evaluation, generally, could learn much about the meaning and value of evaluation from a look into the ideas and practices of this community of practice. (T. Schwandt, personal email communication, November 7, 2019)

It is important to acknowledge that evaluators in other sectors like the federal government, private sector, or international agencies might well generate quite different results. These results are not generalizable to all evaluators, but they represent an important and influential evaluation sector. As noted earlier, the values-focused tool for reflective practice is included as Exhibit 2 (in the Appendix) to encourage inquiry among other groups of evaluators where how values are treated may well be quite different.

Your Baseline

Before sharing the results from the 40 Roundtable evaluation consultants and foundation evaluation officers who contributed to this article, I invite you to participate in this exercise. Take a couple of minutes and write down your answers to the question: *As an evaluator, what do I care about?* Reading the results from the evaluation consultants will be more meaningful if you participate yourself. This is what is called priming (Kahneman, 2011). You'll be more primed to engage with and learn from these results if you undertake the exercise yourself. Don't just think about what your responses might be. Write them down. This is your baseline.

Results: What Do Philanthropic Foundation Evaluators and Evaluation Consultants Care About?

Diversity

One prominent theme among the evaluation consultants was diversity. Stake's article ended with an emphasis on valuing diversity among evaluators. The evaluators at the Roundtable were concerned with ensuring that their evaluation work makes visible the diversity of voices and perspectives among program stakeholders, particularly those whose lives are affected by programs. What follows are their verbatim responses.

What do I care about?

- "Elevating ideas and voices and perspective of diverse voices."
- "Different voices being a part of the conversation about the change that affects our lives (and the role of evaluation as a tool)."
- "Definitions of validity that honor diversity or perspectives, history, and identity."
- "My role in ensuring that different voices are a part of the conversation about the change that affects their lives."
- "Understanding things from perceivers' points of view."
- "Figuring out how to decolonize evaluation—making sure more and diverse voices are heard, especially from the communities most affected, and measuring things that are relevant and guided by community input."
- "Building stronger connections between foundations and evaluators from underrepresented groups."

Inclusion

Closely related to diversity was the theme of inclusion, again with an emphasis on inclusion of those whose lives are most likely to be affected by a program or change strategy.

What do I care about?

- “Inclusive meaning-making.”
- “Using evaluation to bring in traditionally marginalized voices.”
- “Recognizing the power of the question as primary to the power of method—that the topic and framing of inquiry should be inclusive and privilege those closest to the problem.”
- “How can foundations and evaluators engage and support grantees to value/prioritize the voices of the people their work is intended to benefit?”
- “The people who the program intends to serve would recognize their perspective in the findings and recommendations.”
- “Meaningfully integrating voices of who we are serving.”
- “The voices of populations most impacted driving and owning the evaluation at all phases.”
- “How the evaluation is performed (inclusive, presenting the full set of findings).”
- “Having the profession of evaluation be accessible to people who have been oppressed and marginalized historically.”

Equity

Concern for equity was another dominant theme, often linked to inclusion and diversity.

What do I care about?

- “Inequities.”
- “Equity in voice and power.”
- “Evaluation being in service of equity and justice.”
- “The community being served and seek to name our bias and power in an effort to create equity and inclusion.”
- “Disrupting White supremacy, eliminating structural barriers in service of equity.”
- “Human equity, that the structures and practice in both organizations and governments are dramatically shifted toward being conducive to all people’s well-being.”
- “I have a moral imperative to contribute to equity.”
- “I would add an equity advocate instead of being ‘distressed by underprivilege’ [Stake’s language] because this distress implies an actionable response.”
- “Evaluation ultimately helping to transform inequities and improving social conditions.”
- “How do we use ‘window’ of equity in philanthropy to speed up these ideas in practice and make them expected/standard/required?”
- “Income inequality and role that plays in funding our work.”

Diversity, Equity, and Inclusion (DEI)

Commentary

DEI has become a major thrust of philanthropic engagement, nonprofit advocacy, and evaluation commitment. Indeed, a visible and prominent group of evaluators committed to social justice have long emphasized the principles of DEI. But only recently has DEI become an official expression of values among philanthropic foundations and nonprofits on a large scale. Many of the evaluators at the Roundtable, consultants to and staff of foundations and nonprofits, have been framing their

evaluations with DEI principles. Moreover, some evaluation consultants who listed one of these, listed all three, as in the following response: *What do I care about?*

- “Constituent voice and DEI—Diversity, Equity, Inclusion (empowerment of communities).”

During the three days of the Evaluation Roundtable, references to DEI were common. Several foundations participating in the Roundtable have officially adopted DEI as a values framework (for examples of DEI statements, see Ford Foundation, 2019; McKnight Foundation, 2019; and for additional background on DEI in foundations, see D5 Coalition, 2013; Spilka et al., n.d.). Many of the Roundtable participants collaborate with the Equitable Evaluation Initiative (EEI) that promotes the use of evaluation as a tool for advancing equity (e.g., TCC Group, 2019). Equitable evaluation encourages evaluators to incorporate four values in their practice: diversity of teams (beyond ethnic and cultural), cultural appropriateness and validity of methods, ability of designs to reveal structural- and system-level drivers of inequity, and the degree to which those affected by what is being evaluated have the power to shape and own how evaluation happens (Center for Evaluation Innovation, 2017; Equitable Evaluation Initiative, 2019a, 2019b). Jara Dean-Coffey, founder of the EEI and a member of the AEA Board, participated in the Roundtable. Her article in the *American Journal of Evaluation* (Dean-Coffey, 2018), entitled “What’s Race Got to Do With It?” astutely, insightfully, and powerfully presents the centrality and significance of race and equity in philanthropic evaluation.

The second day of the Roundtable featured, as it always does, a teaching case taught superbly by Tanya Beer, entitled “When Opportunity Knocks, Open the Door: Evaluation Amidst Transition at the Colorado Health Foundation” (for background on and examples of evaluation teaching cases, see Center for Evaluation Innovation, 2019; Patrizi & Patton, 2005, 2010). The case included references to DEI. In September 2015, Karen McNeil-Miller took the helm as the new CEO of the Colorado Health Foundation and “brought a fundamentally new vision to the foundation around organizational values, community engagement, roles of program officers, and diversity, equity, and inclusion.” The teaching case concludes with all Colorado Health Foundation staff “participating in broader diversity, equity, and inclusion work, which has created an organization-wide openness for sharing around equity, and exploring equitable evaluation.”

Writing for the *Nonprofit Quarterly*, Ferris (2019) observed:

Equity, diversity, and inclusion is the topic du jour across disciplines and sectors. Writ large, these themes pertain to increasing the access and power of people and population groups who have been treated unfairly—that is, historically excluded, treated differently, or discriminated against. In addition to obvious social justice concerns, motivating these efforts are major demographic shifts occurring in the US, as well as studies that show improved performance, innovation, and profitability benefits for organizations that look like America.

DEI illustrates the reciprocal relationship between trends and initiatives in the larger society and what evaluators care about, commit to, and build competency in. The corporate sector has become concerned about DEI, including gathering and reporting data on DEI progress:

Jobs focused on fostering DEI grew by 20 percent in 2018. CEOs are now just as likely to be asked about their DEI efforts as their product roadmap, and leaders who don’t create inclusive environments are increasingly being held accountable by their employees, the media, and shareholders. (Emerson, 2019)

The Economist (2019) published a feature on DEI *tips for chief executives*. Such discussion about DEI has opened up concerns that the language of DEI makes racism and White frames implicit rather than explicit. One participant referred the group to the characteristics of White supremacy culture

(Jones & Okun, 2001) and called attention to some of the evaluation motifs expressed in those organization cultural characteristics: perfectionism; defensiveness; preferring quantity over quality; worship of the written word; paternalism; either/or thinking; power hoarding; fear of open conflict; individualism; progress is bigger, more; right to comfort; and objectivity. For more on issues of racism and White frames in evaluation language, see Shanker (2019a, 2019b) and Johnson (2019).

Finally, it is worth noting that the global Coronavirus pandemic demonstrated emphatically that DEI is a public health issue. Poor people and minorities suffered significantly greater infection and death rates, had less access to health care, and were more deeply affected by the economic turmoil that accompanied the pandemic interventions, including loss of jobs and increased food insecurity.

Additional “What I Care About” Themes

I have grouped additional responses into themes. Each theme below represents four or five participants’ responses. Verbatim responses are available online to provide readers with the actual language participants used (Patton, 2020b).

Social Justice

As noted in introducing the discussion of DEI, evaluators grounded in social justice concerns have been advocating for DEI for some time. Some responses specifically referenced social justice. One wrote: “I care about doing the work of unlearning the beliefs and mental models and mindsets that we’ve internalized that keep us complicit to the challenges and realities of social injustice.”

Co-Creation

DEI involves co-creation, another prominent theme among the Roundtable evaluation consultants, whose responses tended to link co-creation to the power of individuals and communities to either shape the change efforts that affect their lives or the power to shape the evaluations that make judgments about those efforts. An example: “Evaluation can support and build respectful, meaningful and reciprocal partnerships across all levels of stakeholders (staff, leadership, grantees, communities, consultants, etc.)”

Learning

Another prominent theme in the Evaluation Roundtable over the years has been learning, which emerged as a focus for several of the participants. One emphasized: “I care about open, accessible transformative learning amongst/within all those involved in the evaluation. All have learned through the process of evaluation—content, knowledge, skills, assumptions—and are different (see world differently) after (and hopefully their organizations have transformed).”

Evaluation Use

Evaluation use concerns what happens to an evaluation’s findings and the impacts of the evaluation process on those who participate in the evaluation. Learning supports use, and use supports learning. One wrote: “I care about evaluation informing strategy and grantmaking in a useful and timely manner.”

Evaluative Thinking

Building the capacity of stakeholders to employ the logic of evaluation has been getting a lot of attention (Vo & Archibald, 2018). The issue arose often during the Roundtable, especially in relation to capacity building. “I care that evaluation not be thought of as a single point-in-time

event but as a continuous evaluative thinking state through the life cycle of an intervention, project, program, etc.”

Supporting Social Change and Betterment

Many of the evaluators reported taking an explicitly activist, change-agent stance in their evaluation work—making a difference and helping the intended beneficiaries of programs:

- “I care about making people’s lives better.”
- “I care about people and community. While I need to develop a sound evaluation plan and reports/products for my client, I need to continually ask myself if what I am doing is causing harm and perpetuates systems of oppression.”
- “I care that evaluators contribute to creating conditions where people/groups flourish.”

Integrity, Morality, Values, and Ethics

The activism and advocacy stance of these evaluators is grounded in their ethics and sense of what it means to act with integrity and be morally responsible. “Be and act morally. Integrity of you as a person should guide the work you are facilitating to see the future where people are working with want to be.” Another wrote: “Do not harm the vulnerable peoples the work is supposed to be helping.”

Context and Complexity

“I care about wrestling with and addressing complexity in evaluative inquiry.” One participant valued:

Situating—From where/whence we and others are looking, and in addition to rationalities and logic, our physicality, emotion, spirituality, and mental burdens [and] recognizing and naming the fact that our assumptions + biases from our situatedness will never all be visible.

Individual commitments and concerns. Stake (2004) concluded his article by asserting that “comprehensive, idiosyncratic interpretations are small steps toward saving the world” (p. 107). Several responses illustrate individually idiosyncratic expressions of values.

- “Reawaken, recover, reignite traditional knowledge, language, and cultural practices.”
- “Dispersion of evaluation practices and ideas beyond evaluators into philanthropic leadership and communities.”
- “Stories, both listening for the stories people tell and helping to connect and share those stories.”
- “Contributing to the open source knowledge base about what has been tried, what worked (whom?), what didn’t work, so we use philanthropic money for highest and best use.”
- “Avoiding false certainty and avoiding biased truths.”
- “Making space for incommensurable truths (and) throwing light on/testing accuracy (of what we believe).”

Single, Bottom-Line Comment From One Participant

What do I care about? EVALUATION.

What Do We Learn From These Reflections and This Analysis?

The range of responses shows these evaluators aware of and in tune with enduring and emergent issues in evaluation. The themes in Stake's original list of things evaluators care about holds up fairly well some 15 years later, or so it seems to me, but the language needed updating. The emphasis on DEI replaces Stake's reference to caring about the "underprivileged," inviting more explicit attention to who has power to shape and judge the value of social change programs and efforts. Other language changes: from rationality to evaluative thinking, from democracy to social justice, and from caring about evaluation in general to caring about evaluation that explicitly contributes to a better world. Absent from Stake's list was co-creation: mutuality between evaluators and intended users in which evaluators feel responsibility for sharing power and engaging with the underrepresented to facilitate their perspectives being valued and their voices being heard.

Based on these evaluators' responses, one thing in Stake's observations remains especially true today: his proposed diversity principle. It is clear that these evaluators share many values, but they also, as individuals, have particular and unique interests and commitments. Having watched them in action, listened to their analyses, and synthesized these results, I feel confident in reaffirming Stake's proposed principle:

It should be expected that any two competent evaluators, working together or apart, will seldom agree fully on criteria and standards, critical incidents and experience, and on the appropriateness of the evidence of merit and worth. The full use of validation, triangulation, and meta-evaluation is essential but it will not eliminate uncertainty in the evaluation findings.

Evaluators should be encouraged to "have a life" and to "have a dream" so their interpretations are enriched by personal experience. Comprehensive, idiosyncratic interpretations are small steps toward saving the world. (Stake, 2004, p. 107, emphasis added)

Toward Saving the World

We now know what the Roundtable evaluators care about and emphasize in their practice. Earlier, I invited you to make your own list of what you care about. Let me now invite you to take a moment and consider what, if anything, strikes you as missing from what these 40 evaluators said they cared about. As a foreshadowing of what I find missing, I'll share what I would add to Stake's list.

What Do I Advocate for and Care About?

In facilitating the Evaluation Roundtable exercise, I've been asked what I would add to Stake's list. Fair question. What I would add is also what I find disturbingly missing from these evaluators' responses. *I care that evaluation contributes to the sustainability of humanity on our planet, our beautiful and endangered Blue Marble.*

Blue Marble refers to the iconic image of the Earth from space, a photo taken on December 7, 1972, by the crew of the Apollo 17 spacecraft on its way to the Moon, one of the most reproduced images. Dubbed the "Blue Marble," it is an image of the Earth without borders or boundaries, a whole Earth perspective. We humans are using our planet's resources, and polluting and warming it, in ways that are unsustainable. Many people, organizations, and networks are working to ensure the future is more sustainable and equitable. Blue Marble evaluators enter the fray by helping design such efforts, provide ongoing feedback for adaptation and enhanced impact, and examine the long-term effectiveness of such interventions and initiatives. Incorporating the Blue Marble perspective means looking beyond nation-state boundaries and across sector and issue silos to connect the global and local, integrate the human and ecological, and employ evaluative thinking and methods in working with those trying to bring about global systems transformation. *Blue Marble Evaluation* (Patton, 2020a) aspires to make evaluation part

of the sustainability solution rather than part of the global climate emergency problem. The Coronavirus pandemic has provided a wake-up call for the magnitude, scope, and urgency of transformations needed to address the looming and accelerating global climate emergency.

Transforming Evaluation to Evaluate Transformation

“We are the first generation to know we are destroying our planet
and the last one that can do anything about it.”

World Wildlife Fund UK Chief Executive, Tanya Steele (2018)

What stands out to me as missing in these evaluators’ responses is attention to sustainability of our planet and humanity. In addition to the effects of global warming, we have polluted oceans, land, and air; increased worldwide population growth; and uprooted migrants and displaced persons at record levels. The Union of Concerned Scientists has moved the Doomsday Clock to 110 seconds before midnight because of the increased threat of nuclear annihilation given the politics of our time. A recent *New Directions for Evaluation* centered on sustainability (Julnes, 2019). The theme of the 2016 AEA Annual Conference was *Visionary Evaluation for an Equitable and Sustainable Future*. Beverly Parsons, then AEA president, has coauthored a book by that name (Parsons et al., 2020).

The International Development Evaluation Association (IDEAS) held its 2019 conference in Prague. The theme was *Evaluation for Transformative Change*. The conference concluded with a “Declaration” of 10 recommendations, one of which addressed sustainability *as a universal evaluation criterion*:

In all our evaluations, we commit to evaluating for social, environmental, and economic sustainability and transformation . . . (IDEAS, 2019)

While the Roundtable evaluators care deeply about equity, concern about sustainability is absent from their priority concerns and commitments. Given that omission, in closing let me address the intersection of social justice and sustainability, an intersection that seems to me essential *toward evaluators’ contributions to saving the world* – and an intersection highlighted by the health and economic disparities exposed and exacerbated by the Covid-19 pandemic.

Social Justice and Environmental Justice

Brazilian Paulo Freire (1970), author of *Pedagogy of the Oppressed*, was a champion for the poor. He devoted his life to fighting injustice and supporting empowerment of the oppressed. A *Pedagogy of Evaluation* (Patton, 2017) was inspired by and dedicated to Freire. His work reminds us that all evaluation approaches constitute a pedagogy of some kind. All evaluation teaches something. What is taught and how it is taught varies, but evaluation is inherently and predominantly a pedagogical interaction. That’s why what we care about matters because it is embedded in what we communicate and teach as we engage in evaluations.

In his later years, Freire became an ardent environmentalist and a pioneer in environmental justice, what he called *ecopedagogy*, harmonizing and integrating ecology and pedagogy. The ecopedagogy movement emerged in Latin American at the second Earth Summit held in Rio de Janeiro, Brazil, in 1992. Paulo Freire was writing a book on ecopedagogy upon his death in 1997. Here’s a brief excerpt:

. . . how urgent [it] is that we fight for more fundamental ethical principles, such as respect for the life of human beings, the life of other animals, of birds, and for the life of rivers and forests. I do not believe in loving among women and men, among human beings, if we do not become capable of loving the world.

Ecology has gained tremendous importance at the end of the century. It must be present in any educational practice of a radical, critical, and liberating nature. (p. 47)

These were the last words Paulo Freire wrote, dated April 21, 1997, before his death on May 2 (Freire, 2004, pp. 47–48).

Pedagogy of the oppressed and ecopedagogy became deeply intertwined in his later writings. Yet, I encounter many working on social justice issues who consider environmentalism a White, middle-class concern or a philosophy relevant primarily to Indigenous cultures. Perhaps it suffices here to reiterate that those who will be most negatively affected by climate change are those who are poor and vulnerable, especially children.

UNICEF (2015) director, Anthony Lake, introduced a report on the impact of climate change on children, entitled *Unless We Act Now*, with an overview of the threat to poor children worldwide:

In every crisis, children are the most vulnerable. Climate change is no exception. As escalating droughts and flooding degrade food production, children will bear the greatest burden of hunger and malnutrition. As temperatures increase, together with water scarcity and air pollution, children will feel the deadliest impact of water-borne diseases and dangerous respiratory conditions. As more extreme weather events expand the number of emergencies and humanitarian crises, children will pay the highest price. As the world experiences a steady rise in climate-driven migration, children's lives and futures will be the most disrupted. (p. 6)

In the field of evaluation, social justice concerns have a long history and dedicated practitioners. Evaluation for an equitable society is supported by a substantial body of evaluation theory and dedicated practitioners who make the case that evaluations should be conceptualized and implemented in ways that highlight disparities and injustices—and that evaluation should actively promote equity (Dean-Coffey, 2019, 2020; Donaldson & Picciotto, 2016); indeed, that “equitable evaluation applies to all evaluation” (Coffman, 2018). This means advancing anti-oppressive and culturally responsive methods to mitigate societal inequalities while also acknowledging, scrutinizing, and dealing with “the other side of inequality—privilege” (Hall, 2019, p. 1).

Scriven (2016) has called equity “the last frontier of evaluation ethics.” But the evaluation ethics of sustainability now looms as the last frontier, one in which the future of humanity is at stake. Environmental justice lags as an evaluation focus. The world needs social justice and environmental activists to come together in common cause. That won't be easy because of the racism and White supremacy that people of color and indigenous people experience in White-led and White-dominated environmental organizations. Still, increasingly, environmentalism is becoming understood as relevant to everyone, to people of all backgrounds (Toney, 2019). Anthony Rogers-Wright (2018), who describes himself as both an Earth Citizen and Black Liberationist, straddles those two worlds and has observed:

Withdrawal from the challenges associated with climate change and White supremacy is simply untenable at this point in history. The stakes are too high for the climate community and the planet alike. And you have to ask yourself how some of the most ardent climate champions have found the ability to cope with the stress that comes with taking on powerful entities like the fossil fuel industry and political establishments, but not the stress that comes with dismantling racism/white supremacy in their own spaces? Whomever determines the answer to this riddle may be responsible for saving the world. . . .

Ironically, if not paradoxically, by not naming white supremacy as a major function of climate change, and by not addressing its manifestations within “progressive” spaces and their own organizations, the professional environmental nonprofit apparatus takes part in their own climate denialism. Discussing climate science may be less uncomfortable than talking about the role racism and white supremacy play in disproportionately impacting Black and Brown folk. And it's certainly less disconcerting than discussing the role racism/white supremacy plays in the climate “movement” itself. But

embracing this discomfort has become necessary to dismantle the myriad systems of oppression that contribute to the oppressive system of climate change. (p. 1)

Rev. Mariama White-Hammond, pastor of New Roots AME church in Dorchester, MA, carries the title of Minister for Ecological Justice. As an African American woman, she says, “The reality is this world is crumbling, we need to start figuring out how we’re going to live differently.” What made her live differently was witnessing the way that climate change, economic inequality, and racial demographics clashed during Hurricane Katrina in 2005. “Until that point, I believed in climate change,” she says. “But I kind of said, ‘Let the White environmentalists deal with this.’” But in the midst of Hurricane Katrina, she says, “I—for the first time—really saw how climate change was a threat multiplier.” It is important to connect the dots between issues like climate change, immigration, and prison reform. In the fight against the climate crisis, she stresses the need for something deeper than facts. “I think a lot of scientists early on thought that if they just told people the facts, we would make the logical decision and move forward,” she says. “The only way we’re going to shift, is if we are called to fight more deeply for the things that we love. And if we don’t love each other across race, across class, then we will sacrifice each other” (Costello, 2019).

Heglar (2019), an African American activist fighting to integrate social and environmental justice movements, explains why current climate action must be grounded in historical context.

This crisis didn’t appear out of thin air. Someone did this to us: the fossil fuel industry and the governments that aided and abetted it. And it didn’t start there. The fossil fuel industry was born of the industrial revolution, which was born of slavery, which was born of colonialism.

It’s no accident that the map of climate change’s worst wrath to date looks like a colonizer’s playground. Because that’s what it is. And it’s also no accident that when it does play out in more “affluent” countries, it finds its way to communities of color with all the precision of a heat-seeking missile—that’s a feature, not a bug.

We don’t have to sit idly by and watch our future burn. We are not powerless. “You write in order to change the world,” James Baldwin said. “The world changes according to the way people see it, and if you alter, even by a millimeter, the way a person looks or people look at reality, then you can change it.”

I want to change the narrative around our climate crisis, to make it more intersectional, more emotional. More inclusive. I want to break it apart, remove the lies and the half-truths, add in the missing parts, name the unnamed, make the implicit explicit. I want to make it so that people of color see themselves in it—because we’ve always been in it. At its center, even. In other words, I want to make it whole.

I don’t want a fact-finding mission. I want a truth-telling movement. (p. 1)

Evaluation as a profession suffers this same history of racism and White supremacy. Going blue (Blue Marble) and green (environmental) does not exempt us from dealing with Black, Brown, and White. Quite the contrary. Decolonizing evaluation (Chouinard & Hopson, 2016), culturally responsive, and equitable evaluation have to be part of the Blue Marble evaluation commitment to and engagement with sustainability for human survival on Earth. So, concern for sustainability of the Earth and humanity was what I found missing in these evaluators’ statements of what they care about. Did it appear on your list?

Explicitly Expressing Our Values as Evaluators

In summary, evaluators care about certain things and what they care about influences how they conduct evaluations. That was Stake’s conclusion, a conclusion supported by the findings from the expert evaluators’ perspectives presented in this article. But how explicit and transparent are evaluators about their values and the influence of their values on their work? I asked that question in the follow-up survey of Roundtable evaluators.

How Often Do You Express Your Personal Values to Stakeholders as Part of Your Evaluation Work?

| | | |
|-------------------------------|----|-----|
| I always express my values | 4 | 14% |
| I usually express my values | 16 | 57% |
| I sometimes express my values | 4 | 14% |
| I rarely express my values | 3 | 11% |
| I never express my values | 1 | 4% |

The responses show that 71% of the expert evaluator sample always or usually express their values as part of their work. The Coronavirus pandemic and climate emergency have raised the stakes in this regard for all of us. When it comes to the survival of humanity and the planet, we all have “skin in the game” (Patton, 2020a, chapter 12). Each of us and our loved ones are in the world that is under threat. We are not outside looking in. We are part of the global system and there’s a good chance that we are each, in our own way, part of the problem. This gives us a quite different stance from what is typically expected. Evaluators are virtually always outside the programs or projects they evaluate. Acknowledging and facing the realities of the pandemic and climate emergency transforms the stance of evaluators from external observers of change to internal participants in change. This has, at the very least, the following implications:

- A shift in evaluator stance from independence to interdependence.
- Making evaluators’ values explicit and transparent becomes essential not optional.
- Identifying your stake and acting accordingly is a matter of urgency.

Being Explicitly Values-Based Evaluators

When we did this exercise at the Evaluation Roundtable, I had expected the results to lead to an updated list of things evaluators care about. As I experienced the great diversity of responses to the exercise, it struck me as inappropriate to narrow that diversity to a new list that would judge which responses were sufficient by frequency or quality to be included in the list.

So, I abandoned the notion of a new list. Any given list of things evaluators care about cannot possibly cover the rich variety of kinds of interventions and evaluations in this marvelously diverse world. The values articulated and embraced by this group of evaluators are shared here to illustrate possibilities and stimulate further contextual adaptation not to be treated as universal or standardized criteria. The diversity of responses reported in this article constitutes a menu of value possibilities, though far from exhaustive of such possibilities.

Instead of an updated list, then, let me invite you to consider the substantial value in having the evaluators and primary intended users of any evaluation engage together in the process of determining what values are appropriate for a given evaluation. Thus, instead of a new list of things evaluators care about, I offer a reflective practice tool for making explicit and transparent the primary values of evaluators and/or intended users. See Exhibit 2 in the Appendix for the values clarification reflective practice tool.

Stake’s original insight, that evaluators bring their values into their work, remains central to this inquiry and reflective practice exercise. The values we bring to evaluation reflect the times we live in, both in how they are expressed (language) and what commitments they represent (substance). Making our values explicit, sharing them, and learning from each other are all parts of *reflective practice*, one of the evaluation competencies adopted by the AEA in 2018. The AEA Cultural Competency statement, adopted in 2011, helped build momentum toward more explicitly and transparently addressing and expressing values of both participants in evaluations and evaluators themselves.

What do you care about as an evaluator? How does what you care about inform your evaluation practice? Join the evaluators who contributed to this article in reflective practice.

Appendix

Exhibit 1. What Evaluators Care About: Robert Stake's (2004) List.

1. *We care about the evaluand*, the object being evaluated. Often we believe in it
2. *We care about evaluation*. We want to see others care about it.
3. *We advocate rationality*. We would like our clients and other stakeholders, our colleagues and heads of department to explicate and be logical and even-handed.
4. *We care to be heard*. We are troubled if our studies are not used.
5. *We are distressed by under-privilege*. We see gaps among privileged patrons and managers and staff and underprivileged participants and communities. We aim some of the evaluation at studying issues of privilege, conceptualizing issues that might illuminate or alleviate under-privilege, and assuring distribution of findings to those often excluded.
6. *We are advocates of a democratic society*. We see democracies depending on the exchange of good information, which our studies can provide. But also, we see democracies needing the exercise of public expression, dialogue, and collective action. Most evaluators try to create reports that stimulate action.

Source: Stake (2004, pp. 103–104, emphasis added).

Exhibit 2

Reflective practice framework and tool for illuminating evaluators' values. Group reflective practice exercise for expressing evaluator's values: Facilitation steps and process.

1. Introduce the exercise.
Facilitator: "This exercise will facilitate our reflecting together on the values that inform our evaluation work, both collectively and individually." We begin with the six things that evaluation pioneer Robert Stake identified in his classic 2004 article in the *American Journal of Evaluation* entitled "How Far Dare an Evaluator Go to Change the World?" (Share Stake's list of six things evaluators care about; see Exhibit 1.)
"Rate how important each of these values is to you and your approach to evaluation" (see items to rate in Step 2).
2. Hand out the values-focused reflective practice rating instrument below. If the technology is available, participants can respond electronically (using a survey phone app).
Facilitator: "Rate each item on how much you care about this in your evaluation practice."

| Stake's Six Things Evaluators care About | Very Important to Me in My Evaluation Practice | Somewhat Important to Me | Not Important to Me |
|--|--|--------------------------|---------------------|
| 1. I care about the evaluand, the object I'm evaluating. | | | |
| 2. I care about evaluation. I want to see others care about it. | | | |
| 3. I advocate rationality. | | | |
| 4. I care to be heard. I am troubled if my evaluations are not used. | | | |
| 5. I am distressed by under-privilege. | | | |
| 6. I advocate for a democratic society. | | | |

3. Facilitator: “Write down any wording changes to Stake’s list that you would make to the statements to make them more relevant to you and our time more than a decade after Stake’s article.”
 4. Group participants into groups of four or five people.
 5. Participants in small groups share suggested wording changes with others in their group.
 6. Facilitator: “To complete this exercise, we’re offering you an opportunity to add your own items to the list of things evaluators care about. What values in addition to (or instead of) the six identified by Stake undergird your evaluation practice? Take 5 min to think about these and write them down.”
 7. Facilitator: “Share your values and additions with the people in your group.” (List them on newsprint/flip charts for all to see, if available.) Otherwise, each table reports verbally on the additions from their group.
 8. Facilitator asks participants: “What patterns or themes do you see in the suggested additions as reported by the small groups?”
 9. Report the aggregate results of the rating responses to Stake’s 6 items. (While people in small groups are identifying and sharing their values, the group facilitator should tabulate questionnaire rating results from Step 2 to share with the whole group.)
 10. Discussion and interpretation questions:
 - How do you bring your values into your work?
 - Some evaluators keep their values to themselves. They take a stance of neutrality. Other evaluators make their values explicit, especially when they are involved in participatory or collaborative evaluations that include co-creation, like developmental evaluation or empowerment evaluation. What is your stance about expressing your values to stakeholders?
 - Discussion in small groups to conclude the exercise.
- Optional additional reflective practice exercise.
11. In small groups, have participants share their perspectives on and discuss the recommendation to make *equity* and *sustainability* universal criteria to be included in all evaluations.

Development acknowledgment: Variation of the exercise with both program and evaluation participants in the same session. Lija Greenseid, Minnesota-based independent evaluation consultant, used and tested a version of this exercise at the AEA 2019 Annual Meeting in Minneapolis. She reported results very similar to those of the Roundtable.

On 11/18/19, Lija Greenseid facilitated an Advocacy TIG think tank session at the American Evaluation Association conference entitled “Evaluator as advocate: How far dare we go toward saving the world?” Approximately 40 people attended the session. The session facilitator provided a short overview of Stake’s six advocacies, then conducted a reflection exercise. Participants were given 1 minute to respond to the question, “As an evaluator, what do I care about?” They then formed groups and created a group list of their responses. Next, participants were asked to reflect on the question, “As an advocate (or concerned citizen), what do I care about?” They again formed groups and created a list.

The groups were tasked to compare their two lists and identify what was on both lists, on just the evaluator list, and on just the advocate list. There were many similar items on both evaluator and advocate lists. The evaluator-only lists mapped well onto Stake’s original list and the findings in this paper. The advocate-only list included one additional value not on the evaluators’ list: *climate change*. (L. Greenseid, personal communication, November 22, 2019)

Exhibit 3

Participants' work positions and status, and clients of the expert evaluation respondents. These results are from a survey of named respondents following the Evaluation Roundtable. The survey was conducted by the Center for Evaluation Innovation, convener of the Roundtable, specifically for this article.

1. About what percentage of your evaluation work is with philanthropic foundations?

| | | |
|-------------|----|-----|
| 25% or less | 5 | 18% |
| 26%–50% | 3 | 11% |
| 51%–75% | 7 | 25% |
| 76%–100% | 13 | 46% |

2. For your work in philanthropy, how would you best characterize your current status?

| | | |
|---|---|-----|
| Staff at a foundation | 9 | 32% |
| Staff of a for-profit organization | 6 | 21% |
| Member of a collaborative consulting team | 5 | 18% |
| Solo independent consultant | 2 | 7% |
| Staff of a nonprofit organization | 1 | 4% |
| Staff or faculty at a college or university | 1 | 4% |
| Other (please specify) | 4 | 14% |

- a. Technically, I'm not a staff but the owner of a for-profit organization.
 - b. Member of collaborative consulting team and staff/faculty at a college/university.
 - c. Academic (professor).
 - d. I have my own company. I put together teams for projects.
3. Beyond foundations, what other kinds of evaluation clients do you work with, if any? (Select all that apply)

| | |
|--|----|
| State, regional, or local nonprofits | 19 |
| National nonprofits | 14 |
| State or local government | 12 |
| International agencies or NGOs | 9 |
| Federal government | 8 |
| School systems (K–12 or postsecondary) | 6 |
| Private-sector clients | 4 |
| NA (not applicable) : I only work with foundations | 4 |
| Other (please specify) | 5 |

- a. Communities/block clubs.
- b. Tribal governments, tribal NPOs (nonprofit organizations), and tribal schools and colleges.
- c. Consortia, collaborations, or partnerships that include multisector representation.
- d. I am not an evaluator, but a scholar who examines performance measurement and learning in nonprofits, foundations, impact investors, and bilateral aid agencies.
- e. Quasi-government agencies.

Exhibit 4

Participants in the Evaluation Roundtable exercise who self-identified.

- Teri Behrens, Editor in Chief, Director, *The Foundation Review*, Dorothy A. Johnson, Center for Philanthropy;
- Katrina Bledsoe, Independent Consultant;
- Nicole Bowman, President and Founder, Bowman Performance Consulting;
- Shanesha Brooks-Tatum, Founding Vice President, Creative Research Solutions;
- Ted Chen, Director, Evaluation and Organizational Learning, Margaret A. Cargill Philanthropies;
- Joanna Cohen, Senior Evaluation Officer, John D. and Catherine T. MacArthur Foundation;
- Jara Dean-Coffey, Founder and Director, Equitable Evaluation Initiative; Founder and Principal, Luminare Group;
- Alnoor Ebrahim, Professor of Management, The Fletcher School, Tufts University;
- Rachele Espiritu, Founding Partner, Change Matrix;
- Ben Fowler, Cofounder and Principal, MarketShare Associates;
- Anne Gienapp Director, ORS Impact;
- Ashleigh Halverstadt, Officer, Evaluation and Learning—S. D. Bechtel, Jr. Foundation;
- Kim Ammann Howard, Director, Impact Assessment and Learning, The James Irvine Foundation;
- Elizabeth Kruger, Evaluation, Margaret A. Cargill Philanthropies;
- Keiko Kuji-Shikatani, Education Officer, Ontario Ministry of Education;
- Carlisle Levine, Evaluator and Applied Researcher, BLE Solutions;
- Richard Margoluis, Chief Measurement, Evaluation, and Learning Officer; Gordon and Betty Moore Foundation;
- Dominica McBride, CEO, Become: Center for Community Engagement and Social Change;
- Marah Moore, Founder and Director, i2i Institute;
- Pam Larson Nippolt, Evaluation Officer, Margaret A. Cargill Philanthropies;
- Erica Orton Officer, Learning and Evaluation, Bush Foundation;
- Jared Raynor, Director, Evaluation and Learning, TCC Group;
- Carlos Romero, President, Senior Evaluator Apex Evaluation;
- AnnJanette Rosga, Informing Change;
- Rhonda Schlangen, Independent Consultant, Rhonda Schlangen Consulting;
- Jesse Simmons, Senior Officer, Evaluation St. David's Foundation;
- Trilby Smith, Director, Learning and Evaluation, Vancouver Foundation;
- Sarah Stachowiak, CEO, ORS Impact;
- Jessica Xiomara-Garcia, Director, Learning for Action; and
- Eleven evaluator participants did not self-identify by name.²

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1. Lija Greenesid, an independent evaluation consultant based in Saint Paul, assisted with the content analysis. Julia Coffman and Tanya Beer reviewed a draft of this article and made helpful comments.
2. The conference ended in the midst of a Minnesota blizzard; some people left as the exercise was going on to deal with flight changes and travel hassles.

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