

The 2002 EES Conference

Three movements in Contemporary Evaluation:
Learning, Theory and Evidence

Evidence: roundtable EV SR 5 Do we need European evaluation standards?

Chair: E.Stern

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Claudio Bezzi*'s statements about Evaluation standards

First of all I'd like to summarize the main statements I'll try to explain to you. Probably my speech will not follow exactly your expectations, because I'm not interested in the analytical definition of each standard, as much as in a more general plan we probably might call *epistemological* or – why not? – *meta-evaluative*.

Let me tell you the four main statements that encompass my thought in this matter; I'll explain every one in a very short way in this first round, then – if it is possible – I'll go into more depth later.

These are my four statements about the question of evaluation standards:

1. First of all we find (and we have to solve, in some way) the epistemological question of the nature of every statement, rule, declaration and – of course – standard; a *semantics nature*, that means: they are made by words, and words are not 'stones' but – on the contrary – just the reflections of our cultural patterns. There are several very important questions and consequences of this statement, and if we don't consider them, we risk speaking – to each other – about different matters.
2. Secondly, when we have agreed a solution about this question (*if* we find a solution) we have to discuss the additional problem of the intercultural and interlinguistic European frame. That means: do we search for one meaning for every standard or several related meanings for several different countries, social groups, and so on? Put simply: is it possible to build one meaning in the European context?
3. Thirdly, we encounter – at this point and, in my opinion, not before – the crucial point of the purposes of our standards; why do we want standards? I think we may seek those purposes not in instrumental and formal issues, but in a social issue. By that I mean if we concentrate on instrumental and formal issues we will miss the importance of the procedure of building them itself: it is through our discussion on standards that we can improve evaluation, as I'll try to explain to you later.
4. Fourthly – and finally – only when we have defined our purposes may we discuss every standard, and probably we'll walk down a path similar to that which our American colleagues have already done, at least as far as general format and main issues of our standards.

Before proceeding in my speech, it's important I clarify my general opinion about evaluative standards: although I look to these complicated questions, I think we need our evaluative standards. I think they have a very particular role: not a regulative one but to awaken ourselves and our public (sponsors, programme beneficiaries, other stakeholders...) to several crucial questions

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<http://www.europeanevaluation.org/general/Papers%20for%20the%20web/g%20EV%20SR4/bezzi.pdf>

which we cannot avoid, like the importance of ethical and deontological problems, the methodological issues, the question of utility and utilization, and so on.

The first question – I would like to remind you – was the intrinsic nature of the standards as a semantic issue. I think this isn't the right place to discuss in an in-depth way the question, but let me summarize at least some of the main important questions (from my point of view!):

We can understand the world just in our mutual exchange of experiences and, more specifically, throughout the mutual construction of meanings about 'what does it mean?' and 'which is its sense?'. Lots of sociologists and psychologists (of course!) have explained this crucial issue¹, but before them the modern Physics fathers said the same²; several evaluation authors explore this question, but from my point of view the Evaluative perspective isn't yet conscious enough about the consequences of this point in Program evaluation work – and not just in some kinds of (often considered) marginal participative evaluation.

This 'social construction of reality' works just by *signification* work, that means: we build signs (put simply: words) to link a meaning to a fact, to stuff, to a thought, and just by those signs we communicate something about that fact, stuff, thought. Probably. Because the context-related signification, the whole range of meanings is always larger than the specific meaning we are trying to explain, and this gap leaves us – always – a sort of bias in our comprehension.

In other words: we work just through words with context-related, persons-related, age-related meanings. The more words are referred to abstract concepts, more and more we experience difficulties in their clear and unique definition; so: probably it's easy for us to discuss what the best choice for our dinner this evening is, but it's very hard to define the ethical frame for evaluation, the best way for evaluation's utilization, what 'mixed-methods' or 'triangulation' means in our methodological approach. In a few words: it isn't easy to discuss clearly about standards.

[2ND STATEMENT: ONE OR MORE SETS OF STANDARDS?] This is simply a consequence of the above statement. Because of the context-related meanings of our words, the more the context is complex, compound, multi-lingual, multi-cultural and so on, the more our words are subject to several biases in our attempts at translation and adjustment. Every professional translator knows this topic. But the problem isn't just a translation one. We have a more general social problem; it's called *informability* by the English, meaning we need specific care to communicate in a suitable way related to the age, social class, culture, gender and context of the target; one different way to every kind of person. We might have the illusion of a similarity among us: naturally we all are culturally advanced, evaluators, english-speaking (more or less, as you can hear), social scientists (and conventionally of the same *female* gender, as Carol Weiss teaches us!³), but I doubt this is enough to avoid misunderstanding among our community.

In any case we may agree about the evaluation complexity: new approaches, methods, theories, spring up every day in evaluation's landscape, and often we disagree about what is *monitoring* vs. *evaluation* vs. *assessment*; what we may include or exclude by the *ex-post* evaluation; what *exactly* 'net effect' means; which kind of relationship we might find between program and implementation theory; how much we may share the *participation* in the participative evaluation; and so on, with a lot of different controversial issues. How can we advocate a unique meaning in our standards?

[3RD STATEMENT: PURPOSES OF THE STANDARDS] Several questions might find a solution discussing the purposes of the standards, so it's time to discuss the main problem: why do we want evaluation standard?

I say again: we have to refuse any normative, rigid, one-meaning role of our standards. A normative role involves a unique meaning of the whole standard set, but involves – of course –

¹ I'm referring to Schütz, Jones, Berger & Luckmann, Garfinkel, Goffmann and several others.

² I'm referring to Born, Heisenberg, Pauli, Bohr and other founders of the quantum theory in the 20's.

³ Carol Weiss, *Evaluation. Second edition*, Prentice Hall, Upper Saddle River, NJ, 1998, p. 7

also a recognized Authority as supervisor; who wants it? And: who wants to take on the responsibility? I'm sure I don't need to say any other words about this.

My point of view – a consequence of my previous speech – is favourable to a specific *social* role I'll call “negotiation role”. Let me explain what negotiate is in my mind: I define ‘negotiate’ as the exchange among stakeholders to conventionally stipulate a signification about a concept⁴. I think this is one of the most important evaluative quests. When a sponsor asks me to evaluate a program, first of all I put on the table several questions: not just “what's the evaluanda?” but “in which way do you define your program?”, “in which different ways do other stakeholders define it?”, and the work to define the evaluanda is a mining work involving their objectives, their interests and – in a way – their World understanding. A negotiation is simply this: find a common understanding about the evaluanda to proceed in the evaluative work.

I think this is a good recipe for us. Our purposes might be to contribute to the European exchange about ‘How Evaluation has to work’. Our standards might be like a flexible set of statements that suggests to us general principles, rather than rigid ways to follow; sites to discuss our certainties, rather than unquestionable truths; general guide-lines for our behaviours, rather than laws established once and for ever.

Probably, in this way, we'll obtain several purposes:

- an up-to-date European agenda for our main issues, state-of-the-art theoretical problems, context-linked questions, and so on (think about the Structural Funds and the European policies, for example);
- an up-to-date foundation to our transnational, transcultural European evaluative theory and methodological works;
- very important: a guide-line for our *sponsors* and other stakeholders, the real beneficiaries of the standards. I think we have to write standards for them, to permit them to understand evaluation, and to build effective evaluative questions.

Finally we may discuss which standards we want. I prefer to avoid a long discussion about them. I think you all know other evaluative standards, and probably ours will be very similar, talking about the three main fields: ethics and deontology; methodology and practice performances; utility and utilization.

Lastly, I want to say just a final word about the role of EES and national evaluation societies. I hope EES wants to assume the role of co-ordinator and supervisor of an amazing work performed by the national evaluation societies in Europe. I imagine a European permanent team, with members from every Society, working under the supervision and the guarantee of the EES.

⁴ I've discussed this concept in my *Il disegno della ricerca valutativa*, Franco Angeli, Milano 2001.