

EPILOGUE: COMMENTS ON THE SPECIAL ISSUE

Nancy L. Porteous
Health Canada
Ottawa, Ontario

The articles in this Special Issue give a glimpse of the current context for evaluation in the health and human services field. They uncover some of the attitudes that various stakeholders have toward evaluation and they point out many of the diverse roles and skills that evaluators must have to be effective in today's environment. There are also issues for consideration at the association level — what are some of the ways in which the Canadian Evaluation Society (CES) could respond to the gaps or challenges highlighted by this collection of articles?

CONTEXT OF EVALUATION IN HEALTH AND HUMAN SERVICES

This is an era of horizontal delivery, integration, community-based programming, and partnerships in funding and service delivery. With a frequently singular focus on cost containment, there is greater competition for program funding as well as scarce resources for evaluation, often despite different evaluation requirements imposed by multiple funders. Reform of systems, reorganization of institutions, and a constantly changing program environment often mean that the target for evaluation is a moving one. In addition, with an emphasis on collaboration, evaluators are required to make a trade-off between methodological rigour and meaningful participation in the evaluation process.

Pressure is mounting to demonstrate the results of programs. Along with the demand to evaluate outcomes, there is an urgency to evaluate early in the life cycle of a program. Lawson and Hadjistavropoulos describe the challenges of carrying out an impact evaluation soon after a new initiative has commenced. In the program that Farrell and Aubry describe, funders mandated an evaluation of the pilot program during the first six months of implementation. Farrell and Aubry point out the obvious limitations of their “one case — first consumer” cost analysis, as costs are likely to diminish over time in this community mental health program.

ATTITUDES TOWARD EVALUATION

Sometimes evaluation is embraced by health and human services program staff as an important opportunity for learning and improvement. Other times, evaluation is seen by program stakeholders as a labour intensive, intimidating, externally mandated activity. Several authors argued that program staff need some basic understanding of evaluation.

To foster positive attitudes toward evaluation, it is also important to demonstrate the usefulness of evaluation to program staff. For example, Farrell and Aubry share how “Program managers noted that the comprehensive costing results enabled them to make the case to the Ontario Ministry of Health and Long Term Care for funding these types of services.” Flynn, Aubry, Guindon, Tardif, Viau, and Gallant discuss how counsellors could use ongoing monitoring of evaluative data to guide their counselling practice.

EVALUATOR ROLES AND SKILLS

Shaping attitudes toward evaluation and influencing the design, conduct, and use of evaluation are important roles of the evaluation specialist. Lawson and Hadjistavropoulos use their study as an example to illustrate other possible roles of evaluators: protocol trainer, program archaeologist, mediator and therapist, educator, and change agent. This diversity reflects the art and science of evaluation and highlights the importance of interpersonal relationships. Increasingly, evaluators must understand theories of change and organizational development.

Several authors touched upon the role of evaluators in enhancing the evaluation capacity of various stakeholders. Lawson and Hadjistavropoulos describe the vague goals and objectives of the program they were asked to evaluate and how they translated highly politicized macro-level long-term outcomes into more concrete short-term outcomes. This is a challenge faced regularly by evaluators working in the health and human services sector. Perhaps that is the allure of the program logic model. Lawson and Hadjistavropoulos, Chaytor, MacDonald, and Melvin, and Porteous, Sheldrick, and Stewart discuss the benefits of teaching program staff about the logic model. I have witnessed many program staff latch on to the logic model after an introduction to it; they appreciate its simplicity and see the possible uses of the model in their work.

In contrast, Clyne and Edwards believe that many program staff and evaluators are intimidated by economic evaluation. Economic evaluation is not new, but how do we promote it in the evaluation field? The introductory module of the four-part CES Essential Skills Series (ESS) in Evaluation mentions cost analysis, cost-effectiveness, and cost-benefit analysis as part of the discussion on process and outcome evaluation. The fourth module of ESS includes a section on relating program costs to outcomes and provides a more detailed overview of cost-effectiveness as well as cost-benefit analysis, including the advantages and disadvantages of each approach. This cursory overview is perhaps sufficient for introductory training such as ESS, but clearly there is a need for more intensive training on economic evaluation. It would be interesting to systematically compare the current state of economic evaluation in Canada to 1998 when the *Canadian Journal of Program Evaluation Special Issue on Economic Evaluation* was released.

Not surprisingly, even CES feels the pressure to articulate outcomes. As described by Zorzi, Perrin, McGuire, Long, and Lee, the CES recently completed a consultative project to, among other things, define the benefits of evaluation. It strikes me, however, that the Society will need valid and reliable economic data to convincingly make the case that there is value in evaluation. For this to happen, economic evaluation of individual evaluations is required to enable meta-analysis and macro-economic evaluation of the evaluation enterprise itself.

ROLE OF EVALUATION ASSOCIATIONS

Enhancing the Capacity of Program Managers and Staff

Evaluation associations have a role not only in the professional development of evaluation specialists, but also with program managers and staff. The CES Essential Skills Series fills some of this training gap, but there is great demand for additional learning opportunities. The National Capital Chapter of CES has created a program for matching evaluators interested in some pro bono work with local nonprofits requiring evaluation assistance (http://ncc.evaluationcanada.ca/e/building_matching.cfm). Perhaps CES should consider working with umbrella groups such as the Coalition of National Voluntary Organizations or the Health Charities Council of Canada to expand this matching program or to develop an evaluation internship program for the nonprofit sector.

Creating the Linkages

Chaytor et al. argue that funders and academic institutions have an important role to play in enhancing evaluation capacity. Bozzo brings the challenge closer to home for me by discussing the role of a national evaluation association like CES and its regional chapters. For example, Bozzo sees “a large yet seemingly untapped opportunity for cross-fertilization between the evaluation and nonprofit worlds.” What is the role of evaluation associations in enhancing evaluation capacity?

Working with Funders

One option for working with funders is to take on traditional advocacy strategies such as writing position papers addressing issues like resources, timing, and reporting requirements. However, as a not-for-profit, voluntary organization itself, CES does not have the financial or human resources to create and sustain expensive, long-term initiatives. But CES does have solid systems and activities currently in place to help make a contribution. Let me suggest a couple of top-of-mind examples of practical ways in which CES can use existing infrastructure to be a catalyst for creating opportunities for dialogue amongst evaluators, funders, and program personnel. CES can help create a virtual network of evaluators and funders in the public, private, and not-for-profit sectors through the use of the CES web-based online discussion forum, a service that is free to members. What is needed? An interested volunteer to set up the forum, engage participation, and stimulate discussion. Another relatively easy idea to implement would be to organize panel or roundtable discussions at upcoming national CES conferences with funders, nonprofit, and voluntary umbrella organizations and evaluators to work toward common evaluation requirements and templates.

The official launch of the International Organization for Cooperation in Evaluation (IOCE) in early 2003 should provide an even greater opportunity to work with funders on a global scale. The IOCE is a coalition of regional and national evaluation associations. A strong united voice about key issues in the funding of programs and their evaluations has potential for influence with funders.

Working with Academic Institutions

CES does not have particularly strong linkages with academic institutions. There are certainly a number of individual academics who have played pivotal roles in CES at the national and regional level, but there are few systematic linkages with the academic community as a whole. CES does not have a comprehensive inventory of evaluation-related courses offered by community colleges and universities across the country. We do know that many course instructors rely on texts from the big names in the United States, as there are few Canadian evaluation texts. The CES Student Paper Contest and the Student Case Competition have been successful at generating interest at a dozen or so institutions, but reach is limited. Again, we need to be creative in thinking about ways to use our existing services and activities such as this *Journal*, the web site, the annual conference, the Case Competition, and the Paper Contest to create an engagement strategy.