

Volkov, B. B. (2011). Beyond being an evaluator: The multiplicity of roles of the internal evaluator. In B. B. Volkov & M. E. Baron (Eds.), *Internal evaluation in the 21st century. New Directions for Evaluation*, 132, 25–42.

3

Beyond Being an Evaluator: The Multiplicity of Roles of the Internal Evaluator

Boris B. Volkov

Abstract

The chapter explores critical roles of internal evaluators in contemporary organizational settings. The need is highlighted for an expanded, reconfigured, unorthodox set of roles and styles of work to meet the needs of the emerging learning organizations effectively. A discussion of major categories of internal evaluator roles emerged from the analysis of the evaluation literature and other sources suggests new directions for how internal evaluation is conceptualized and practiced. Systematic promoting and advancing positive change, evaluation capacity building, decision making, learning, and evaluative thinking in organizations are seen as part of the harmonized internal evaluator role. © Wiley Periodicals, Inc., and the American Evaluation Association.

Given the ever-increasing importance of evaluation information for organizational planning and decision-making processes, as well as the fact that a substantial share of evaluation work nationally and worldwide is implemented internally (Fitzpatrick, Sanders, & Worthen, 2004; Love, 1991, 2005; Sonnichsen, 2000), there is a strong need to develop better understanding of multiple roles and associated practices of internal evaluators. According to Skolits, Morrow, and Burr (2009), descriptions of evaluator roles in the existing literature are in many cases not sufficiently delineated or conceptualized. Chelimsky (2001) makes the point

that the roles and responsibilities of the internal evaluators in the organizations ought to be pragmatically clarified.

So far, there is no unanimous agreement on the classification of the effective internal evaluation (IE) practices and associated internal evaluator roles. Only a handful of authors (Love, 1991; Patton, 2008; Sonnichsen, 2000) have tried to capture the gamut of the internal evaluator roles. Even though “carefully defining the role of internal evaluator is a key to effective and credible internal evaluation use” (Patton, 2008, p. 221), there have not been recent publications that would synthesize the existing information on the various roles of internal evaluators. There is a considerable gap in the literature in this area. In an attempt to improve this situation, this chapter utilizes information from an extensive review of the empirical literature on evaluation and evaluation capacity building (ECB) in organizations, the author’s personal experiences with implementing and studying internal evaluation and ECB, and other sources.

Defining Internal Evaluation

Internal evaluation has been defined in various ways. The operative terms include *internal*, *decision-making*, *information*, *learning*. Michael Scriven’s Evaluation Thesaurus describes IE as that “done by project staff, even if they are special evaluation staff—that is, even if they are external to the production/writing/teaching/service part of the project” (Scriven, 1991, p. 197). There is broad agreement in the internal evaluation literature that IE exists to support the organizational and program management decision-making process (Duffy, 1994; Love, 1983b, 1991; Patton, 2008; Sonnichsen, 2000; Torres, 1991). Duffy (1994) describes IE as the process of using qualified, experienced staff members “to assess their organization’s policies, programs, or problems and report their findings and recommendations to the head of the organization” (p. 26). The internal evaluation process in organizations serves “the dual purpose of providing information and of influencing behavior, including decision-making behavior” (Love, 1983b, p. 8). Torres (1991) writes about the traditional view and practice of internal evaluation as “a staff function informing operations, management, and/or strategic planning” (p. 190). According to her, increasingly, the goal of internal evaluation is not about reflecting the perspectives of program management but rather about promoting empathetic and responsible decision making through the fair and sensitive representation of multiple issues and perspectives and based on the use of the evaluative information.

Internal evaluation is also a powerful organizational intervention with the methodology contingent on political and practical circumstances (Love, 1991). Among many other things, internal evaluation can be called an applied research activity in support of organizational development and learning (Love, 2005). Duffy (1994) perceives IE as a variation of “action research, frequently focusing on issues of immediate concern to the management of

an organization” (p. 25). This type of applied research draws on a wide assortment of approaches and methodologies from multiple fields (e.g., organizational psychology, the management and information sciences). Sonnichsen (2000) asserts that “internal evaluation is not simply the application of traditional evaluation methodologies inside organizations but the adaptation, reconstruction, and reframing of evaluation methodologies to operate effectively inside organizations” (p. 23).

Based on the literature review and my own experience, I would like to suggest a systems-based understanding of internal evaluation. Internal evaluation can be defined as a comprehensive and context-dependent system of intraorganizational processes and resources for implementing and promoting evaluation activities for the purposes of generating credible and practical knowledge to inform decision making, to make judgments about and improve programs and policies, and to influence organizational learning and decision-making behavior. We will discuss the internal evaluator’s roles needed to make such a system operate successfully.

Expanding the Traditional Evaluator Role

The notion of “the ‘role of the evaluator’ is central to the theory and practice of evaluation” (Ryan & Schwandt, 2002, p. vii). The term *role* is also central to this chapter; therefore, it is important to clarify what it actually means. A role is an explicitly and implicitly expected function performed and behavior associated with a particular position in an organization. Katz and Kahn (1978) perceive a role as a building block of a social system conveying the requirements of that system to its members. Roles are also the translation of professional values, priorities, and principles into behaviors and courses of action to deliver desired results. Internal evaluation work is shaped to a substantial degree by such roles, which provide combinations of behavioral and social expectations for what is effective, appropriate, and meaningful. Evaluators’ roles, in turn, are defined, according to Themessl-Huber, Harrow, and Laske (2005), by the competencies they need, the functions they are expected to carry out, how they interrelate with evaluation stakeholders, and the contextual factors presented by the organization or program. Patton (2008) also emphasizes the responsiveness of the role of an evaluator to the circumstances of actual practice.

A number of additional, ostensibly external to evaluation, roles come into play for internal evaluator. Clifford and Sherman (1983) argue that the internal evaluators face pressures and objectives inside organizations that are very different from those of their external colleagues. Internal evaluators have to make appropriate adaptations to fit their roles to particular organizational conditions. Speaking of the proverbial resistance to evaluation in organizations, it is my belief that in many cases it is not an antievaluation sentiment overall, but rather a rejection of bad evaluations and/or evaluators. The “it is not the evaluator’s job!” mentality is engrained in some

evaluators who neglect the importance of responsiveness, flexibility, and creativity that must be applied to their functions and, as a result, find themselves not being able to do their real job effectively; as a result they are forced to reconsider the nature of their practice. Without adjusting and expanding the evaluators' role kit, the situation may not be much different from the one Love (1983a) lamented about by saying that "the image of the internal evaluator appears to fluctuate between that of a hatchet man for the executive director and that of an emissary from Babel who speaks in a strange tongue about incomprehensible topics" (p. 2).

Considerable evaluation literature underpins the perspective of the expanding of the traditional role of the evaluator (e.g., Anderson-Draper, 2006; Barkley, 2001; Bellavita, Wholey, & Abramson, 1986; Jenlink, 1994; Love, 1983a, 1991; Newman & Brown, 1996; Preskill, 1994). The internal evaluation role in organizations, according to Barkley (2001), is more of "a study in professional cross dressing requiring the adoption of new roles, swapping of disciplines and crossing of boundaries in reconfigured, decentred, organisations that display multiple cross sectoral identities" (p. 2).

The internal evaluator role set is an emergent property, the arising of interdependent patterns and functions during the process of adaptation to the complex, changing world of organizations. It is affected by interactions with the organization leadership, program staff, program beneficiaries, and partners. This allegorical advertisement by Dozois, Langlois, and Blancher-Cohen (2010), listing a range of competencies and capacities for the developmental evaluation practitioner, can be easily translated into a job ad for the internal evaluator:

Wanted. Caring individuals to support a hazardous but important journey. Must be able to play a variety of roles: coach, strategist, observer, researcher, facilitator, cheerleader, lore keeper, map maker, and critical friend. High tolerance for complexity and uncertainty important. People skills critical. Must be passionate about creating positive social change. (p. 62)

This chapter is concerned with so-called *macrolevel* evaluator roles addressing "higher level orientation to an evaluation" (Skolits et al., 2009, p. 292) as compared to the evaluation activity-based (*microlevel*) roles suggested by the same authors for external evaluators (also applicable to internal evaluators, in my view) to address responsive role orientations for the specific evaluation activities in which they are often engaged. The two approaches are concordant. It is not a purpose of this article to identify all the roles needed for internal evaluation to be relevant and effective. Internal evaluation is a rather complex undertaking with many potentially important variables and conditions. The objective here is to highlight a limited selection of categories of roles that are currently seen to be of most utility for internal evaluators to be able to influence organizations and their programs positively.

Essential Roles Associated With Internal Evaluation

A quick analysis of the 2010 AEA Career Center listings showed that about 50% of them were strictly internal evaluator positions. The job titles, instead of *evaluation*, could include the words *assessment*, *measurement*, *monitoring*, *learning*, *knowledge management*, and *accountability*. The internal evaluator job descriptions were up to three pages long and included multiple responsibilities in diverse areas. The range of internal evaluation activities within organizations include, but are not limited to, implementing needs and evaluability assessments; developing program theories/logic models; developing evaluation plans; developing appropriate measures, indicators, methods, and instruments; coordinating, implementing, and training others in data collection, management, and analysis; forming conclusions; providing recommendations and promoting their appropriate use; writing evaluation reports, policy briefs, and fact sheets; presenting to multiple audiences; writing requests for proposals (RFPs) for external evaluation; selecting external evaluators and coordinating their work; and building evaluation capacity in the organization. All of the above activities involve ongoing interaction with multiple stakeholders. In other words, a good internal evaluator ought to be a real jack-of-all-trades.

The findings of the American Evaluation Association's (AEA's) Internal Evaluation Topical Interest Group (IE TIG) membership survey (administered in October 2010) demonstrate that the perceived critical roles played by internal evaluators include designing and implementing evaluations, building evaluation capacity and facilitating evaluations, managing internal evaluation, collecting and analyzing data, analyzing and judging programs, and maintaining monitoring and evaluation (M & E) systems. A number of experiences were also shared by internal evaluation practitioners during a discussion at the IE TIG's inaugural business meeting at the 2010 AEA conference. The meeting participants described their roles and responsibilities as

coaching on data use and helping avoid its misuse as opposed to only providing data,
 “selling” services as opposed to “selling” data,
 working around evaluation utilization,
 showing relevance of evaluation to improving organizational practices,
 tying evaluation use into data-driven decision making,
 increasing transparency of decisions,
 building capacity for evaluation and its use, and
 helping/empowering people to become their own evaluators.

This section presents a list of the patterns that emerged in a comprehensive literature analysis of the sources explicitly discussing evaluator roles (see Table 3.1). The list is intended to help us better understand strategic roles driving the evaluation function in the organizations. The most frequently

Table 3.1. Major Categories of the Evaluator Roles Found in the Evaluation Literature

Major Role Category	Examples of Evaluator Roles	Sources/Authors
Change agent	Change agent; agent of social change; activist; promoting social justice, transformation, and democracy; facilitator of deliberative democratic dialogues; contributing to social betterment and transformation; pursuing potentially unpopular issues; discussor of the undiscussables; educator of change processes; critic; critical friend; social critic; whistle-blower	Bellavita, Wholey, and Abramson (1986); Benjamin and Greene (2009); Duffy (1994); Everitt (1996); Greene (2000); House and Howe (1999); Huberty (1982, 1988); King and Stevahn (2002); Mark, Henry, and Julnes (2000); Mathison (1991a); Mertens (2002); Minnett (1999); Newman and Brown (1996); Patton (2008); Preskill and Torres (1999); Rallis and Rossman (2000); Scriven (2007); Segerholm (2002); Sonnichsen (1988, 2000); Weiss (1998); Whitmore (1998)
Educator about evaluation	Educating about evaluation; teaching, training, coaching, mentoring, and providing technical assistance to managers, staff, and other stakeholders; popularization of evaluation; resource for infusing evaluative thinking	Braverman and Arnold (2008); Chelimsky (1994); Christie (2008); Clifford and Sherman (1983); Conley-Tyler (2005); Dahler-Larsen (2006); Lambur (2008); Leviton (2001); Love (1991); Lyle (2000); Mathison (1991a); Minnett (1999); Morabito (2002); Patton (2008); Preskill and Torres (1999); Rennekamp and Engle (2008); Scriven (2001); Shulha and Cousins (1997); Taylor-Powell and Boyd (2008); Williams and Hawkes (2003)
ECB practitioner	Building evaluation capacity; long-term education of the organization; promoting evaluation; infusing evaluative thinking; facilitating learning processes; leadership role in “mainstreaming” evaluation into the organization; building an organization’s skills and knowledge; driving force for ECB	Baron (this issue); Braverman and Arnold (2008); Conley-Tyler (2005); Dahler-Larsen (2006); Lambur (2008); Leviton (2001); Love (1991); Patton (2008); Preskill and Torres (1999); Sanders (2002); Rennekamp and Engle (2008); Schweigert (this issue); Sonnichsen (2000); Taylor-Powell and Boyd (2008); Volkov (2008); Williams and Hawkes (2003)

(Management) decision-making supporter	Supporting program decision making; management facilitator, analyst, adviser, and consultant; management supporter; management information resource; management decision-support specialist; administrator's tool; problem solver; expert troubleshooter	Brazil (1999); Clifford and Sherman (1983); House (1986); Kennedy (1983); Leviton (2001); Love (1983b, 1991); Mathison (1991b); Patton (2008); Sonnichsen (2000); Stufflebeam (2003); Torres (1991); Weiss (1998); Wholey (1983)
Consultant	Consultant; management consultant; program staff consultant; organizational development consultant; consultant-mediator; advisor or a consultant to program managers; adviser; counselor	Barkdoll (1982); Brazil (1999); Clifford and Sherman (1983); Fleischer (1983); Lambur (2008); Love (1983, 1991); Morabito (2002); Owen and Lambert (1998); Patton (2008); Perrin (2001); Rennekamp and Engle (2008); Sonnichsen (1988, 2000); Torres (1991)
Researcher/ technician/ analyst	Researcher; applied researcher supporting organizational development and learning; social researcher and operations researcher; social scientist; technical servant; technician; technical geek; collaborative researcher; action researcher; policy analyst, studying topics selected by top management	Brazil (1999); Campbell (1969); Clifford and Sherman (1983); Hopson (2002); Kennedy (1983); Love (2005); Mark (2002); Noblit and Eaker (1987); Skolits et al. (2009); Sonnichsen (1988); Weiss (1998)
Advocate	Program advocate; advocacy for support; champion of evaluation; advocate for intended primary users; evaluation use advocate; advocate for the program's target groups; advocate for the most vulnerable population; advocate for cultural justice	Bellavita, Wholey, and Abramson (1986); Greene (1997); Hood (2001); Hopson (2001); Mertens (2007); Newman and Brown (1996); Patton (2008); Skolits et al. (2009); Sonnichsen (2000); Stake (2004)
Organizational learning promoter	Building, supporting, and promoting organizational learning; organizational development consultant; advancing organizational knowledge; educating about learning and change processes	Braverman and Arnold (2008); Clifford and Sherman (1983); Fleischer (1983); Leviton (2001); Love (2005); Morabito (2002); Owen and Lambert (1998); Preskill and Torres (1999); Russ-Eft and Preskill (2001); Sonnichsen (2000)
Other roles	Facilitator; generalist/jack-of-all-trades; planner; collaborator; independent observer; evaluator; judge; information specialist	Multiple authors

cited categories of roles of the evaluator include change agent, educator about evaluation, ECB practitioner, (management) decision-making supporter, consultant, researcher/technician/analyst, advocate, and organizational learning supporter. In the “other” category can be found such roles as a facilitator, generalist, planner, collaborator, independent observer, judge, information specialist, and last but not least the role of evaluator (which may seem like a tautology). Some of the roles are partly or substantially overlapping roles—complementing and reinforcing each other. Because it is impractical due to space limitations to discuss all categories of roles mentioned in the evaluation literature, this section will highlight only a few roles suggested by the majority of the reviewed literary sources.

Change Agent

The most frequent role mentioned in the literary sources was change agent—and for an obvious reason. We usually evaluate something to make it right, to correct and improve things, in other words, to bring a positive change to what we are doing. According to Sonnichsen (2000), for internal evaluators, change agent is a fundamental role involved with scrutinizing organizational performance and providing recommendations for improvement. A large number of internal evaluators, according to Duffy (1994), consider themselves change agents in their contributing to the formulation of policy development. Capable members of the evaluation unit strategically situated within the organizational hierarchy and functioning within a change agent and advocacy role can contribute to significant organizational learning and transformation.

Internal evaluators maintain their credibility and integrity only when they are not afraid to speak truth to power and to the powerless, to “pursue potentially unpopular issues” (Mathison, 1991b, p. 177), to ask hard questions, and to discuss the undiscussables (Minnett, 1999; Senge, 1997). As a result, positive changes can be brought about in diverse ways and affect different levels within the program, organization, and far beyond. This is the reason why, in addition to evaluation use, Kirkhart (2000) suggests the notion of evaluation influence to describe “the capacity or power of persons or things to produce effects on others by intangible or indirect means” (p. 7). Evaluators should contribute to social betterment and transformation (King & Stevahn, 2002; Mark, Henry, & Julnes, 2000), serve as facilitators of deliberative democratic dialogues (House, 1993; House & Howe, 1999), and support social justice (Greene, 2000; Mertens, 2002).

Educator About Evaluation

The internal evaluator is an educator by design. Education as a role of evaluation in society was emphasized by Cronbach & Associates (1980) and

Weiss (1998). However, according to Mathison (1991b), the internal evaluator is “also an educator about evaluation—about what evaluation is, about what evaluation can and cannot do, about evaluation as an area of intellectual interest. Just because an organization decides it should have its own evaluation office, this is no guarantee of a practical understanding of what evaluation is” (p. 178). Scriven (2001) states that people should be offered adequate education about the value of evaluation. Patton (2008) learned that “people were more receptive to evaluation if they understood it from within their own worldview” and stressed the importance of connecting program staff and participants with “this alien and often fear-inducing notion of evaluation” (p. 103). Similarly, Christie (2008) illuminates the role of the internal evaluator as a teacher who dispels myths about program evaluation.

Indeed, many evaluation practitioners excel at educating a variety of stakeholders about multifaceted aspects of evaluation with the use of a number of techniques. For example, their efforts include dissemination of evaluation results to colleagues and partners; sharing examples of successful evaluation practices that relate to the organization; conducting seminars about evaluation approaches and techniques (Minnett, 1999); or “training managers and employees in quality control methods, quality measurement, and interpersonal techniques” (Love, 1991, p. 79). “Learning by doing it” is another approach, the importance of which is hard to overemphasize (Volkov, 2008; Volkov & King, 2007). It includes the meaningful and persistent engagement of the program stakeholders in evaluation planning, developing logic models, data collection and analysis, and reporting.

ECB Practitioner

The evaluation capacity-building practice is different from program evaluation in that the goal of ECB is to strengthen and sustain effective evaluation practices; however, IE and ECB have strong potential for reinforcing each other in multiple areas and can be coevolving, systematic, and adaptive processes. ECB processes and outcomes can be useful for the IE practice by decreasing evaluation anxiety, stimulating leadership/staff interest and skills in program evaluation, identifying challenges and opportunities for quality evaluation, improving program evaluability (readiness for evaluation), and increasing evaluation use. That is why a number of authors believe that ECB is part of the line of duty of internal evaluators (Baron, this issue; Love, 1991; Rennekamp & Engle, 2008; Schweigert, this issue; Sonnichsen, 2000; Taylor-Powell & Boyd, 2008; Volkov, 2008). Sonnichsen (2000) stresses the fact that to fulfill the role of the internal evaluator, “the ultimate objective is to build evaluation capacity in the organization to an acceptance level where evaluation is perceived as an indispensable component in the structural, administrative, and operational configuration of the organization” (p. 18). The ECB role of the evaluator translates into enhancing the

organization's ability to access, build, and use evaluative knowledge and skills; cultivate a spirit of continuous organizational learning, improvement, and accountability; and create awareness and support for program evaluation and self-evaluation as a performance improvement strategy in the internal and external environments in which it functions (King & Volkov, 2005).

As an example, Rennekamp and Engle (2008) illuminate the work of extension evaluation specialists who successfully build the capacity of local extension educators by serving as consultants, coaches, and trainers. Taylor-Powell and Boyd (2008), describing the ECB role as one of the responsibilities of internal evaluation professionals, note that in a demanding world of organizations, managing the ECB role requires relationship building, stewardship, and vision. The authors also caution us about "a constant challenge to be seen as an ECB practitioner—building skills, processes, and infrastructures—rather than a program evaluator 'doing evaluations,' especially when performing the tasks of program evaluation is the key to securing buy-in and moving individuals and groups into the next level of capacity" (p. 57).

(Management) Decision-Making Supporter

To make a difference in the organization and its programs, the evaluator's role should be integrated in the decision-making process. As stated by Brazil (1999), the functional role of the evaluator includes the one of decision maker, including the principal tasks of analysis, coordination, and policy implementation. Clearly defined as an advisor to program managers, the evaluator is in a better position to influence organizational change.

Being concerned about objectivity of internal evaluation, House (1986) called the internal evaluator an "administrator's tool." The good news, however, is that this management tool is designed to help fix the organization's programs and practices, the belief shared by Brazil (1999), Clifford and Sherman (1983), Kennedy (1983), Love (1983b, 1991), Mathison (1991a), Patton (2008), and Sonnichsen (2000). The internal evaluator's task is to leverage the opportunities to make evaluation of value to the decision makers. Sonnichsen (2000) urges the internal evaluators to switch from a neutral, detached stance to the one of active engagement in the decision-making processes.

Mathison (1991a, p. 162) describes program evaluation as part of overall information-processing activities engaged to monitor and improve the organizational performance and highlights "a necessity for evaluators to operate close to and in the interests of the organization's management" promoted by a decision-making model of evaluation. Patton (2008) also depicts the role of the evaluator as management consultant, decision support, and management information resource. According to Love (1983b), the internal evaluation and planning and management activities have to be interconnected, and the role of evaluator should be as well defined as that of consultant

to program managers. Clifford and Sherman (1983) concur that the internal evaluator has a role of a management decision-support specialist in possession of technical, analytical, interpersonal, and organizational skills and the ability to recognize in what situations these management-support skills should be applied to facilitate planning and control functions of managers.

Consultant

The notion of the consultant role is rather wide-ranging. Block (2000) tells us that “[y]ou are consulting any time you are trying to change or improve a situation but have no direct control over the implementation. If you have direct control you are managing, not consulting” (p. xxi). Sounds familiar? That’s right, it is about us evaluators. Indeed, according to the same author, “A survey of problems . . . an evaluation, a study—all are consultations for the sake of change. The consultant’s objective is to engage in successful actions that result in people or organizations managing themselves differently” (p. 5).

Sonnichsen (2000) promotes “thinking like consultants” (p. 291) and explains that being an evaluator–consultant means the recognition of the fact that formal evaluation is only one of the numerous approaches to problem solving. He goes on by saying that

Most organizational phenomena are not static and therefore do not easily lend themselves to facile measurement or quantification. However, evaluator–consultants, combining their evaluation expertise, management skills, and institutional memory, can still appropriately examine these phenomena by defining the problem and identifying the correct methodology for addressing the issue. (p. 295)

Clifford and Sherman (1983), Morabito (2002), and Owen and Lambert (1998) emphasize the organizational development consultant role of the evaluator, whereas Love (1983b) and Brazil (1999) perceive the evaluator as an advisor or a consultant to program managers. The primary objective for internal evaluator’s consultancy is to generate evaluative processes and information that have a positive effect on the organization and its initiatives. The consultant role requires diverse technical and interpersonal skills, whereas in-depth knowledge of the organization should allow a more effective utilization of consultant skills.

Researcher/Technician

In their daily work, evaluators optimize best practices from the social research field to solve organizational problems. Weiss (1998) believes that the role of a detached, scientific researcher still holds true for the evaluator—in addition to the new, more participative roles. The evaluator is not a basic

researcher but rather an “applied researcher,” according to Love (2005), and is expected to be engaged in research activities that support organizational development and learning. “Social researcher” and “operations researcher” are those who can handle this kind of work, believe Clifford and Sherman (1983, p. 28).

Skolits et al. (2009) in their overview of the roles driven by evaluation methods cite Noblit and Eaker (1987) to highlight a number of methods-based role orientations, such as positivism (credible expert role), interpretivism (social network broker role), critical theory (emancipator role), aesthetics researcher (connoisseur/critic role), collaborative researcher (broker of interests role), and action research (expert in solidarity with practitioners role). Brazil (1999) explains that a number of organizational situations call for the evaluator’s role of a “statistician, where data analysis is the basic task” (p. viii), whereas Mark (2002) introduces the “technical geek” role. Sonnichsen (1988) also writes about a technical role of a policy analyst of topics of importance to top management.

Advocate

Bellavita, Wholey, and Abramson (1986) argue that the contemporary evaluator is a program advocate but “not an advocate in the sense of an ideologue willing to manipulate data and to alter findings to secure next year’s funding”; rather, it is “someone who believes in and is interested in helping programs and organizations succeed” (p. 289). Sonnichsen (2000) promotes advocacy evaluation as “an overarching, philosophical, activist orientation that modifies the traditional neutral behavior of internal evaluators by increasing the evaluator’s involvement with the organization” (p. 140). To practice advocacy evaluation, the traditional role for internal evaluators should be redefined to include strong interest in and responsibility for the evaluation use. This role overlaps significantly with that of a change agent. As a matter of fact, advocacy evaluation stresses the role of internal evaluators as change agents. Patton (2008) also uses the notions of a champion of evaluation, advocate for intended primary users, and advocate for evaluation use.

Nowadays, as stated by Tarsilla (2010), the question is not about appropriateness of promoting evaluators’ values in their practice, but rather about who should be the target of their advocacy. For example, the role of an advocate for the program’s target groups is important to Greene (1997). Mertens (2007) also urges evaluators to be concerned about the most vulnerable groups of the program participants in terms of social justice and human rights. I think it is safe to say that Finley Peter Dunne’s (1867–1936) “Comfort the afflicted, and afflict the comfortable” principle could be an appropriate credo (or should we say a role?) for program evaluators who would ask pertinent questions, implement proper evaluations, and advocate for their use in introducing positive changes.

Organizational Learning Supporter

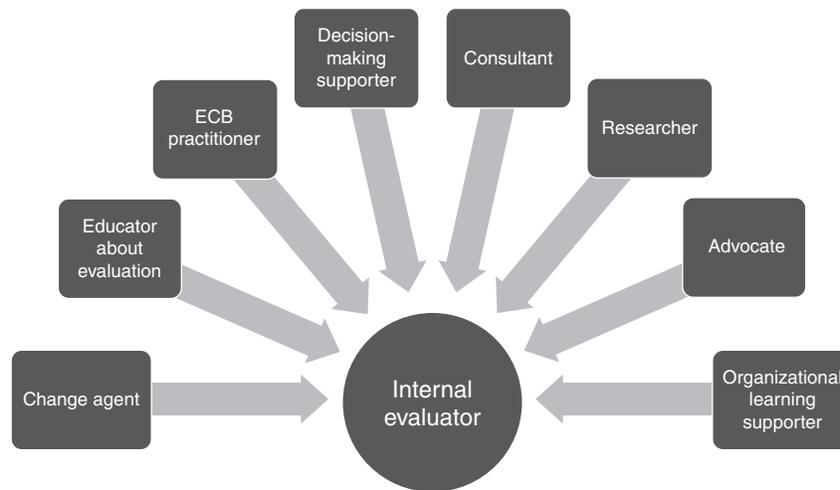
Love (2005) believes that one of the important roles of internal evaluation is to support organizational development and learning. Moreover, “the practice of internal evaluation can serve as the basis for organizational learning” (Sonnichsen, 2000, p. 78). This essential role is clearly linked to the roles of the change agent, ECB practitioner, and educator. An evaluator is an educator of the learning processes of evaluative inquiry, according to Preskill and Torres (1999), responsible also for demonstrating them and helping people acquire and practice them. The evaluator should always seek to increase the utility of internal evaluation information for the purpose of advancing organizational learning (Leviton, 2001). The role of contributing to organizational development is also mentioned by Clifford and Sherman (1983), Morabito (2002), and Owen and Lambert (1998).

Internal evaluators guide the organization’s staff in the learning process of clarifying goals, questioning their practices, and measuring their outcomes. To be engaged in this process, they need to speak the organization’s language, to be in the “organizational know,” and to be immersed in the organizational culture by participating in organizational events, committees, work groups, and so on. To be able to facilitate organizational learning, Sonnichsen (2000) also suggests that internal evaluators understand how the organization obtains information and uses it to learn. He calls such practitioners “informed evaluators, with an understanding of the principles of organizational functions, managerial motivations, and information distribution dynamics” (p. 296).

Conclusion

Those who expect to master the world of internal evaluation with nothing more than a goal of conducting program evaluations while assuming that evaluation data and elaborate analytical tools will win the day may find themselves in a great deal of frustration. An emerging phenomenon in the program evaluation field and academic literature is the multiplicity and elasticity of roles of the evaluators, especially those working inside organizations. This chapter addressed various perspectives concerning the internal evaluators in contemporary organizations, offering the reader opportunities to explore “appropriate roles that have the potential to foster an enhanced evaluation process influence” (Morabito, 2002, p. 328).

Figure 3.1 portrays my view, grounded in the literature and my personal experience, of the essential, macrolevel roles that combine to form and affect the composite identity of the modern internal evaluator. The majority of these roles can probably be placed on a continuum’s end of so-called role integration described by Ashforth, Kreiner, and Fugate (2000), in other words, the roles with low contrast in role-based identities and flexible and permeable role boundaries.

Figure 3.1. Essential Roles of the Internal Evaluator

The evaluator's ability to implement these and other roles will be a function of the evaluator's appropriate attitudes, knowledge, and skills, as well as a confluence of enabling contextual factors. Despite the perceived difficulty of the task, many of the roles seem to be within manageable reach, given the evaluator's personal determination and sufficient support provided by the organizational leadership. How we fit and perform in the big picture of all these roles is how we function in general as internal evaluators. The responsibility for determining what roles to assume and when to assume them rests with the evaluator.

New directions for internal evaluation include adaptation, reframing, and harmonization of evaluator roles to fit complex demands of modern organizations. It is my conviction that in fulfilling these harmonized roles the internal evaluator will be able to act as a catalyst for rewiring the brain of an organization by introducing what I would like to call "the evaluation meme" (*meme* is a term that identifies an idea, behavior, or style transmitted from one person or group of people to another within a culture; e.g., see Lynch, 1996). Modern internal evaluators will understand how to integrate evaluation into programs and staff development in a way that reinforces the importance of evaluation, contributes to its habituation, but at the same time prevents its harmful routinization (senseless, repetitive use of the same techniques or instruments). Evaluative thinking is not only a process, but also a mind-set and capacity, in other words, a person's or organization's ability, willingness, and readiness to look at things evaluatively and to strive to utilize the results of such observations. A challenging role for the internal evaluators will be to promulgate such a mind-set throughout the entire organization.

References

- Anderson-Draper, M. H. (2006). Understanding cultural competence through the evaluation of "Breaking the silence: A project to generate critical knowledge about family violence within immigrant communities." *The Canadian Journal of Program Evaluation*, 21, 59–79.
- Ashforth, B. E., Kreiner, G. E., & Fugate, M. (2000). All in a day's work: Boundaries and micro role transitions. *Academy of Management Review*, 25(3), 472–491.
- Barkdoll, G. L. (1982). *Increasing the impact of program evaluation by altering the working relationship between the program manager and the evaluator* (Unpublished doctoral dissertation). University of Southern California, Los Angeles, CA.
- Barkley, M. (2001). *Internal evaluation on the edge: Postcards from a postmodern practitioner*. Paper presented at the Australasian Evaluation Society annual conference, "Consolidate, Innovate, Expand," Canberra, Australia.
- Bellavita, C., Wholey, J. S., & Abramson, M. A. (1986). Performance-oriented evaluation: Prospects for the future. In J. S. Wholey, M. A. Abramson, & C. Bellavita (Eds.), *Performance and credibility: Developing excellence in public and non-profit organizations*. Lexington, MA: Lexington Press.
- Benjamin, L. M., & Greene, J. C. (2009). From program to network: The evaluator's role in today's public problem-solving environment. *American Journal of Evaluation*, 30(3), 296–309.
- Block, P. (2000). *Flawless consulting: A guide to getting your expertise used*. San Francisco, CA: Jossey-Bass.
- Braverman, M. T., & Arnold, M. E. (2008). An evaluator's balancing act: Making decisions about methodological rigor. *New Directions for Evaluation*, 120, 71–86.
- Brazil, K. (1999). A framework for developing evaluation capacity in health care settings. *International Journal of Health Care Assurance*, 10, vi–xi.
- Campbell, D. T. (1969). Reforms as experiments. *American Psychologist*, 24, 409–429.
- Chelimsky, E. (1994). Making evaluation units effective. In J. S. Wholey, H. P. Hatry, & K. E. Newcomer (Eds.), *Handbook of practical program evaluation* (pp. 493–509). San Francisco, CA: Jossey-Bass.
- Chelimsky, E. (2001). What evaluation could do to support foundations: A framework with nine component parts. *American Journal of Evaluation*, 22(1), 13–28.
- Christie, C. A. (2008). Interview with Eric Barela. *American Journal of Evaluation*, 29(4), 534–546.
- Clifford, D. L., & Sherman, P. (1983). Internal evaluation: Integrating program evaluation and management. *New Directions for Program Evaluation*, 20, 23–45.
- Conley-Tyler, M. (2005). A fundamental choice: Internal or external evaluation? *Evaluation Journal of Australasia*, 4(1/2), 3–11.
- Cronbach, L. J., & Associates. (1980). *Toward reform of program evaluation: Aims, methods, and institutional arrangements*. San Francisco, CA: Jossey-Bass.
- Dahler-Larsen, P. (2006). Evaluation after disenchantment: Five issues shaping the role of evaluation in society. In I. F. Shaw, J. C. Greene, & M. M. Mark (Eds.), *The Sage handbook of evaluation*. London, United Kingdom: Sage.
- Dozois, E., Langlois, M., & Blancher-Cohen, N. (2010). *DE 201: A practitioner's guide to developmental evaluation*. Montreal, Canada: The J. W. McConnell Family Foundation.
- Duffy, B. P. (1994). Use and abuse of internal evaluation. *New Directions for Program Evaluation*, 64, 25–32.
- Everitt, A. (1996). Developing critical evaluation. *Evaluation*, 2, 173–188.
- Fitzpatrick, J. L., Sanders, J. R., & Worthen, B. R. (2004). *Program evaluation: Alternative approaches and practical guidelines* (3rd ed.). Boston, MA: Pearson Education.
- Fleischer, M. (1983). The evaluator as program consultant. *Evaluation and Program Planning*, 6, 69–76.
- Greene, J. C. (1997). Evaluation as advocacy. *Evaluation Practice*, 18(1), 25–36.

- Greene, J. C. (2000, November). *Reconsidering roles*. Paper presented at the Annual Meeting of the American Evaluation Association, Honolulu, HI.
- Hood, S. (2001). Nobody knows my name: In praise of African American evaluators who were responsive. *New Directions for Evaluation*, 92, 31–43.
- Hopson, R. K. (2001). Global and local conversations on culture, diversity, and social justice in evaluation: Issues to consider in a 9/11 era. *American Journal of Evaluation*, 22, 375–380.
- Hopson, R. K. (2002). Making (more) room at the evaluation table for ethnography: Contributions to the responsive constructivist generation. In K. E. Ryan & T. A. Schwandt (Eds.), *Exploring evaluator role and identity* (pp. 37–56). Greenwich, CT: Information Age Publishing.
- House, E., & Howe, K. (1999). *Values in evaluation and social research*. Thousand Oaks, CA: Sage.
- House, E. R. (1986). Internal evaluation. *American Journal of Evaluation*, 7(1), 63–64.
- House, E. R. (1993). *Professional evaluation: Social impact and political consequences*. Newbury Park, CA: Sage.
- Huberty, C. J. (1982). What/who is an evaluator? In C. J. Huberty & D. A. Payne (Eds.), *Contributions of program and project evaluation* (pp. 3–11). Athens, GA: Educational Research Laboratory.
- Huberty, C. (1988). Another perspective on the role of an internal evaluator. *American Journal of Evaluation*, 9, 25–32.
- Jenlink, P. M. (1994). Using evaluation to understand the learning architecture of an organization. *Evaluation and Program Planning*, 17, 315–325.
- Katz, D., & Kahn, R. (1978). *The social psychology of organizations* (2nd ed.). New York, NY: John Wiley & Sons.
- Kennedy, M. M. (1983). The role of the in-house evaluator. *Evaluation Review*, 7, 519–541.
- King, J. A., & Stevahn, L. (2002). Three frameworks for considering evaluator role. In K. E. Ryan & T. A. Schwandt (Eds.), *Exploring evaluator role and identity* (pp. 1–16). Greenwich, CT: Information Age Publishing.
- King, J. A., & Volkov, B. (2005). A framework for building evaluation capacity based on the experiences of three organizations. *CURA Reporter*, 35(3), 10–16.
- Kirkhart, K. E. (2000). Reconceptualizing evaluation use: An integrated theory of influence. *New Directions for Evaluation*, 88, 5–22.
- Lambur, M. T. (2008). Organizational structures that support internal program evaluation. *New Directions for Evaluation*, 120, 41–54.
- Leviton, L. C. (2001). Presidential address: Building evaluation's collective capacity. *American Journal of Evaluation*, 22(1), 1.
- Love, A. J. (1983a). Editor's notes. *New Directions for Program Evaluation*, 20, 1–3.
- Love, A. J. (1983b). The organizational context and the development of internal evaluation. *New Directions for Program Evaluation*, 20, 5–22.
- Love, A. J. (1991). *Internal evaluation: Building organizations from within*. Thousand Oaks, CA: Sage.
- Love, A. J. (2005). Internal evaluation. In S. Mathison (Ed.), *Encyclopedia of evaluation* (pp. 206–207). Thousand Oaks, CA: Sage.
- Lyle, C. (2000). Book review of *High impact internal evaluation*, by Richard C. Sonnichsen. *American Journal of Evaluation*, 21(2), 285–288.
- Lynch, A. (1996). *Thought contagion. How belief spreads through society. The new science of memes*. New York, NY: Basic Books.
- Mark, M. M. (2002). Toward better understanding of alternative evaluator roles. In K. E. Ryan & T. A. Schwandt (Eds.), *Exploring evaluator role and identity* (pp. 17–36). Greenwich, CT: Information Age Publishing.

- Mark, M. M., Henry, G. T., & Julnes, G. (2000). *Evaluation: An integrated framework for understanding, guiding, and improving policies and programs*. San Francisco, CA: Jossey-Bass.
- Mathison, S. (1991a). What do we know about internal evaluation? *Evaluation and Program Planning*, 14, 159–165.
- Mathison, S. (1991b). Role conflicts for internal evaluators. *Evaluation and Program Planning*, 14, 173–179.
- Mertens, D. M. (2002). The evaluator's role in the transformative context. In K. E. Ryan & T. A. Schwandt (Eds.), *Exploring evaluator role and identity* (pp. 103–118). Greenwich, CT: Information Age Publishing.
- Mertens, D. M. (2007). Transformative considerations: Inclusion and social justice. *American Journal of Evaluation*, 28(1), 86–90.
- Minnett, A. M. (1999). Internal evaluation in a self-reflective organization: One non-profit agency's model. *Evaluation and Program Planning*, 22(3), 353–362.
- Morabito, S. M. (2002). Evaluator roles and strategies for expanding evaluation process influence. *American Journal of Evaluation*, 23, 321–330.
- Newman, D. L., & Brown, R. D. (1996). *Applied ethics for program evaluation*. Thousand Oaks, CA: Sage.
- Noblit, G. W., & Eaker, D. J. (1987, April). *Evaluation designs as political strategies*. Paper presented at the Annual Meeting of the American Educational Research Association, Washington, DC.
- Owen, J. M., & Lambert, C. L. (1998). Evaluation and the information needs of organizational leaders. *American Journal of Evaluation*, 19, 355–365.
- Patton, M. Q. (2008). *Utilization-focused evaluation* (4th ed.). Thousand Oaks, CA: Sage.
- Perrin, Burt (2001). Commentary: Making yourself—and evaluation—useful. *American Journal of Evaluation*, 22(2), 252–259.
- Preskill, H. (1994). Evaluation's role in enhancing organizational learning: A model for practice. *Evaluation and Program Planning*, 17(3), 291–297.
- Preskill, H., & Torres, R. T. (1999). Building capacity for organizational learning through evaluative inquiry. *Evaluation*, 5, 42–60.
- Rallis, S., & Rossman, G. (2000). Dialogue for learning: Evaluator as critical friend. *New Directions for Evaluation*, 86, 81–92.
- Rennekamp, R. A., & Engle, M. (2008). A case study in organizational change: Evaluation in cooperative extension. *New Directions for Evaluation*, 120, 15–26.
- Russ-Eft, D., & Preskill, H. (2001). *Evaluation in organizations: A systematic approach to enhancing learning, performance, and change*. Cambridge, MA: Perseus.
- Ryan, K. E., & Schwandt, T. A. (Eds.). (2002). *Exploring evaluator role and identity*. Greenwich, CT: Information Age Publishing.
- Sanders, J. R. (2002). Presidential address: On mainstreaming evaluation. *American Journal of Evaluation*, 23(3), 253–259.
- Scriven, M. (1991). *Evaluation thesaurus*. Thousand Oaks, CA: Sage.
- Scriven, M. (2001). Evaluation: Future tense. *American Journal of Evaluation*, 22(3), 301–307.
- Scriven, M. (2007). Activist evaluation. *Journal of Multi-Disciplinary Evaluation*, 4(7), i–ii.
- Segerholm, C. (2002). Evaluating as responsibility, conscience, and conviction. In K. E. Ryan & T. A. Schwandt (Eds.), *Exploring evaluator role and identity* (pp. 87–102). Greenwich, CT: Information Age Publishing.
- Senge, P. (1997). Comments during satellite discussion of issues in education at the Annual Meeting of the Texas Association for the Supervision of Curriculum Development, Houston, TX.
- Shulha, L. M., & Cousins, J. B. (1997). Evaluation use: Theory, research, and practice since 1986. *Evaluation Practice*, 18(3), 195–208.

- Skolits, G. J., Morrow, J. A., & Burr, E. M. (2009). Re-conceptualizing evaluator roles. *American Journal of Evaluation, 30*(3), 275–295.
- Sonnichsen, R. C. (1988). Advocacy evaluation: A model for internal evaluation offices. *Evaluation and Program Planning, 11*, 141–148.
- Sonnichsen, R. C. (2000). *High impact internal evaluation: A practitioner's guide to evaluating and consulting inside organizations*. Thousand Oaks, CA: Sage.
- Stake, R. E. (2004). *Standards-based and responsive evaluation*. Thousand Oaks, CA: Sage.
- Stufflebeam, D. L. (2003, October). *The CIPP model for evaluation*. Paper presented at the Annual Conference of the Oregon Program Evaluators Network Conference, Portland, OR.
- Tarsilla, M. (2010). Being blind in a world of multiple perspectives: The evaluator's dilemma between the hope of becoming a team player and the fear of becoming a critical friend with no friends. *Journal of MultiDisciplinary Evaluation, 6*(13), 200–205.
- Taylor-Powell, E., & Boyd, H. H. (2008). Evaluation capacity building in complex organizations. *New Directions for Evaluation, 120*, 55–69.
- Themessl-Huber, M., Harrow, A., & Laske, S. (2005). Evaluator roles. In S. Mathison (Ed.), *Encyclopedia of evaluation* (pp. 147–149). Thousand Oaks, CA: Sage.
- Torres, R. T. (1991). Improving the quality of internal evaluation: The evaluator as consultant–mediator. *Evaluation and Program Planning, 14*, 189–198.
- Volkov, B. (2008). A bumpy journey to evaluation capacity: A case study of evaluation capacity building in a private foundation. *Canadian Journal of Program Evaluation, 23*(3), 175–197.
- Volkov, B., & King, J. A. (2007). *A checklist for building organizational evaluation capacity*. The Evaluation Center: Western Michigan University. Retrieved from <http://www.wmich.edu/evalctr/checklists/ecb.pdf>
- Weiss, C. H. (1998). *Evaluation: Methods for studying programs and policies* (2nd ed.). Upper Saddle River, NJ: Prentice-Hall.
- Whitmore, E. (1998). Final commentary. *New Directions for Evaluation, 80*, 95–99.
- Wholey, J. S. (1983). *Evaluation and effective public management*. Boston: Little, Brown.
- Williams, D., & Hawkes, M. (2003). Issues and practices related to mainstreaming evaluation: Where do we flow from here? *New Directions for Evaluation, 99*, 63–85.

BORIS B. VOLKOV is an assistant professor of evaluation studies with the Center for Rural Health and Department of Family and Community Medicine at the University of North Dakota School of Medicine.