The Discipline of Evaluation:
A Helicopter Tour for I-O Psychologists

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Remember when you started studying psychology and tried to explain to people what you did? Many of us had to respond to the accusation that “psychology is not a proper science—it’s just common sense.” But those of us who have studied the subject for years, and—even more challenging—used it in organizational settings, know that there is a lot more to psychology than meets the eye. Paradoxically, one of the hardest tasks we face as practitioners is how to make something incredibly complex look like good, simple common sense to a management audience.

The same is true of evaluation. Most people you talk to will wonder what the big deal is. Your average manager will point out that they do this all the time—try something out and “see if it works.” How complicated can it be? The response is only slightly different when talking to applied psychologists. As an I-O (and later OB) major myself, I initially figured that evaluation was more or less applying I-O research methods to looking at outcome variables…isn’t it? Well, yes and no. The I-O toolkit is a huge head start, but let me tell you—there is a goldmine of extra goodies out there!

What Is Evaluation?

Professional evaluation is defined as the systematic determination of the quality or value of something (Scriven, 1991). For the practicing I-O psychologist, that “something” might be an R&D project, a training program, a policy or strategy, a system or process, an organizational change intervention, a product or service, a business unit, a whole organization, a job, a contract bid or job application, or it might be individual or team performance. There is a fundamental logic and methodology that ties all of these different kinds of evaluation together (personnel, product, program, etc.). This transdisciplinary way of thinking about evaluation provides a constant source of innovative ideas for improving how we evaluate (Scriven, 1993). For example, what we have learned from evaluating products and personnel can often apply to the evaluation of organizational change programs, and vice versa.

Evaluation may be done for the purpose of improvement, to help make decisions about the best course of action for the future, and/or to learn about successes and failures. For any given evaluation, a range of possible approaches is available to the practitioner and the client. If the primary purpose of the evaluation is accountability, then it is important that the evaluation is independent (i.e., none of the evaluation team should have a significant vested interest in whether the results turn out to be positive or negative). But
if independence is not essential and building organizational learning capacity and buy-in is key, an evaluation can be conducted with a degree of stakeholder participation (e.g., Patton, 1997). Many evaluations are conducted collaboratively with organizational staff, internal HR consultants, managers, customers, or a combination of these groups. The best learning organizations tend to use both independent and participatory evaluations to build learning capacity, gather multiple perspectives on how they are doing, and keep themselves honest (Davidson, in press; Rose & Davidson, forthcoming).

Emergence of a Discipline

Although the practice of evaluation has existed for tens of thousands of years, it wasn’t until the 1960s that a true evaluation profession started to emerge, complete with its own unique skill sets and standards. Today’s evaluation profession has its strongest roots in social and educational program evaluation but has also developed semi-independently in a number of other fields, including international development, industrial engineering, health, human services, policy studies, industrial and organizational psychology, information technology, and consumer product testing.

One really exciting thing about this new profession is its unbelievably rapid growth across multiple industries and geographic regions. The past few years have seen explosive growth in the development of new evaluation professional organizations around the globe. In 1995, there were five (5) regional and/or national evaluation associations worldwide. Today there are at least 46, spanning every continent (see http://home.wmis.net/~russon/ioce/eorg.htm). The American Evaluation Association alone has almost 3,000 members, and its annual conferences have been running as long as SIOP’s!

Position descriptions listing the main job function as evaluation are also on the rise. Sure, they masquerade under a range of job titles depending on the industry (e.g., Program Evaluator, Balanced Scorecard Consultant, Process Analyst, Organizational Effectiveness Specialist, Six Sigma Black Belt, Business Evaluation Specialist, Director of Analytics and Outcomes), but the growth trend is definitely there. See for yourself—try browsing the archives of the EvalJobs electronic mailing list: http://evaluation.wmich.edu/archives.

Paralleling this rise in demand for evaluation skills across multiple sectors, there has been an increase in the number of graduate programs where it is possible to major in evaluation. Most of these are currently housed in departments or schools of education, psychology, or educational psychology. Most of the links within psychology are to applied social or educational/school psychology rather than I-O or OB, although there are some exceptions (e.g., http://www.cgu.edu/sbos). Just starting to emerge are the first interdisciplinary graduate programs in evaluation that span multiple academic departments, schools, and/or colleges within a university (e.g., http://evaluation.wmich.edu/phdflier.html).
Evaluation, then, is not just an activity practiced by you, me, and a few consultants. It is rapidly becoming a fully-fledged discipline in its own right and for some very compelling reasons.

**What Can Evaluation Contribute to I-O?**

Why, you might ask, would there be such an interest in evaluation as a separate discipline that would draw people to professional evaluation associations in addition to those related to their content areas (such as I-O psychology, international development, engineering, social policy, or education)? And why would some organizations be specifically looking for evaluation specialists rather than people with applied research skills? What knowledge and skills could evaluation add to the I-O psychologist’s toolkit? And, what could an evaluation specialist add to an organizational consulting team’s repertoire?

To start at the nuts-and-bolts level, there have been some great advances in the development of something called “evaluation-specific methodology.” This collection of tools and methods unique to evaluation turns out to be an extremely useful addition to the I-O practitioner’s (and researcher’s) toolkit because it picks up in many places where applied research methodology left us dangling. Here are a few examples:

1. How would you take a broad mix of qualitative and quantitative data relating to some aspect of a program/product/policy/and so forth and show someone (e.g., a client) exactly how you determined that this cluster of information represented “excellent” quality, value, or performance, as opposed to just “good,” “satisfactory,” or “completely unacceptable”?

2. Obviously, not all criteria are equally important when looking at the quality, value, or effectiveness of something; so, how is it possible to determine which are the most important, and which are really just “tie breakers” in the greater scheme of things? And, can you do this independently, based on a range of evidence, without resorting to “most managers thought…” (or some other strategy that asks someone else to do the weighting)?

3. Many things we evaluate are likely to have some features that are excellent, some that are quite good (but not great), and possibly also several weaknesses. How do we determine, given this mix of information, the overall quality/value of whatever it is we are evaluating? Is it (a) on balance, not quite good enough to buy/fund/support, (b) significantly better than that, (c) a great example of “best practice,” and/or (d) clearly better than the other two options we are considering (or might have considered)?

On the surface, each of these questions sound like fairly straightforward, common sense issues—and they sometimes are, if one is only dealing with one or two performance indicators. But if you have ever tried to really grapple with complex versions of any of the above, you will know that it is a lot trickier than it looks! For new I-O psychologists in particular, it would be
extremely helpful to have some of these methodologies in hand before venturing out into the workforce.

The second major source of value to I-O psychologists is the practical evaluation know-how that has been developed and documented across multiple sectors (business and industry, health, social policy, manufacturing, international development, and criminal justice, to name a few). Ideas have been shared for decades (at conferences, on electronic mailing lists, and in books and journals) about topics like how to get evaluation findings used; how to navigate political and ethical minefields, conflicts of interest, and whistleblower issues; how to deal with conflicting stakeholder values; and strategies for addressing evaluation-related anxiety. As just one example of the body of knowledge available, there is now a Web site of evaluation checklists and guidelines put together by experienced evaluation professionals to guide evaluation practice (see http://evaluation.wmich.edu/checklists).

A third reason for I-O psychologists to delve into evaluation is that it opens up a very broad interdisciplinary network of professionals who think about organizational problems in quite different ways due to their diverse disciplinary roots and work settings. This interdisciplinary fusion can help stimulate outside-the-box thinking, and can hone skills for communicating across different functional areas and disciplines. In addition, it opens up a wider range of sources of information about best practice. Evaluators in business and industry, for example, often pick up useful ideas from evaluators in government, social work, education, international development, and health. And there are lots of evaluators who work across multiple content areas, allowing their clients to benefit from their breadth and versatility.

The long and the short of it is that evaluation knowledge and skills are valuable, extremely valuable, and people are starting to realize this. For those with a background in I-O psychology, they are very much a natural extension of the practical yet analytic instincts we have had drummed into us. Even more importantly, this addition to the I-O psychologist’s repertoire can have instant payoffs by increasing the validity and relevance of our work in organizations.

What Can I-O Contribute to Evaluation?

The potential synergy between evaluation and I-O is no one-way street—there is much that an I-O psychologist could contribute to the development of evaluation theory, methodology, and practice. For example, I-O psychology clearly has the market cornered on personnel evaluation (selection and performance appraisal), which is a veritable goldmine of practical concepts that could be translated for broader use in the evaluation of other entities. Useful advances have been made in many other areas of I-O.

To get down to specifics, there are several tools and methods that have been developed primarily within I-O psychology and related fields that are ripe for application to the evaluation of other programs, policies, and products. These
include utility analysis, the use of multiple hurdles for selection and ranking tasks, 360-degree feedback, job evaluation, organization development and process consulting techniques, dealing with resistance to feedback and change, balancing conflicting values (e.g., work and family, union and management), and infusing organizations with an evaluation-centered "learning culture."

Interestingly, SIOP was not one of the 16 professional organizations of the Joint Committee on Standards involved in the development of either the Program Evaluation Standards or the Personnel Evaluation Standards (see http://www.wmich.edu/evalctr/jc/). Admittedly, APA was one of the sponsoring organizations, and the first drafts of these publications were centered primarily on evaluation in educational settings (e.g., the evaluation of teachers, faculty, and school programs). However, the Personnel Evaluation Standards are about to be revised to encompass a broader sphere, so it would be good to see SIOP step up to the plate to contribute its expertise.

There is a great interest in the evaluation community about I-O-related issues, and multiple opportunities exist for virtual and in-person involvement. The American Evaluation Association (AEA) runs a major international discussion list of almost 2,500 members, EVALTALK (http://bama.ua.edu/archives/evaltalk.html). There are frequent pleas for information about, for example, ROI, the Balanced Scorecard, organizational change, and similar topics. An informal group formed at a recent SIOP conference, the Strategic Evaluation Network, also runs an electronic mailing list specifically for people who do evaluation in organizational settings (see http://evaluation.wmich.edu/archives).

The American Evaluation Association has a Topical Interest Group on Business and Industry (B&I) evaluation (http://www.evaluationsolutions.com/aea-bi-tig), which welcomes presentation proposals (and audience members!) for the annual conference each November. This year AEA meets in Washington, DC (details at http://eval.org), and there are some excellent B&I sessions on the slate. It would be great to see some SIOP folks there!

Whether you stop by to check out the evaluation community virtually or in person, I hope many of you will find something you resonate with that will help spark an interest in turning this dynamic duo of practical disciplines into something far greater than the sum of its parts!

References


