

The ABCs of Evaluation

John Boulmetis and Phyllis Dutwin, Jossey-Bass Inc, 2000, £19.50, ISBN: 0 7879 4432 7, 207

I have long been looking for a word that is less likely to strike fear into the hearts of project managers than “audit”: “evaluation” as described by Boulmetis and Dutwin certainly covers the ground and conveys the positive aspects of reviewing a project or programme not only at its end (summative) but as it is initiated, throughout the design, build and implementation (formative), and well after the dust has settled. They define evaluation as

The systematic process of collecting and analysing data in order EITHER to determine whether and to what degree objectives have been or are being achieved OR to make a decision.

They also add that there is a third purpose: to identify scope for improvement, usually resulting in an action plan to achieve it. However, they concentrate on the first two definitions and do not explore the use of evaluation as a learning tool to perhaps the extent I had expected, given that both authors have a background in education. Perhaps this reflects the need that not-for-profit organisations and those running less tangible projects increasing have to justify as well as account for their work to those who fund them. The evaluation is concerned with outputs and outcomes more than with the processes used to achieve them.

The approach advocated, which starts with measuring *efficiency* and *effectiveness*, is similar to the value of money (VFM) studies which were first used in the UK public sector in the late eighties. These are applied to the resources, activities, strategy and objectives of the project. However, what raises the game is the additional encouragement to evaluate the *impact* of a project: did it make a difference, particularly did it change the behaviour of people affected?

The stages of conducting an evaluation are methodically set out from planning, data collection and analysis through to reporting. There is a running case study throughout the book (based on a scheme to provide occupational therapy for the elderly in residential care) and plenty of other examples. As someone who works in the private sector, I found the non-commercial background initially alien but actually highly applicable to the human aspects of projects which are still often overlooked. The only example I felt translated badly

into the commercial environment was the report (which is flagged only as one possible format) which was clear and objective and showed high quality of thought but was too narrative for the audience of (semi-literate?) managers I have to present to.

The book is aimed at people who are perhaps not professional project managers but who nevertheless make their living by projects and programmes, and who are likely to be reviewing their own or a peer project. The authors distinguish evaluation ‘done to’ (which can become a witch-hunt) from ‘done for’ (a helpful service) but do not explicitly take the concept a stage further to ‘done with’ — which is actually what they describe.

As a professional evaluator I found the how-to descriptions clear and easy to follow, and well supported with reasons. I suspect those unfamiliar with sampling and other technical aspects of collecting evidence might find those sections a little sparse but, in practice, evaluators often have to analyse the data they can get — the authors make a useful distinction between evaluation and research and it is only in the latter that niceties about sampling outweigh pragmatic reality. There are clear tables throughout but some more detailed process diagrams would help with step-by-step implementations. There are questions and examples which help to take the reader through the thought processes, although unless you were using it as a course text book I doubt readers would trouble to work through them.

So, a quick evaluation. Efficiency: a well-structured read that covers the why and who as well as the what and how. Effectiveness: it covers the material it promises and, if followed, would provide a practical method for evaluating projects. Impact: only measurable if it changes the behaviour of people evaluating projects. The current emphasis among auditors on the management of risk has taken them further away from performing evaluations themselves but is likely to increase their demands that project managers and project teams conduct their own evaluations. This should be seen as an opportunity rather than a chore for the project manager. This book will provide a useful background for those who have not attempted evaluation before and some thought provoking challenges for those who make it their living.

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