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American Journal of Evaluation 1997 18: 105

DOI: 10.1177/109821409701800111

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What is This?

Communicating and Reporting: Practices and Concerns of Internal and External Evaluators

ROSALIE T. TORRES, HALLIE S. PRESKILL and MARY E. PIONTEK

ABSTRACT

This study investigated internal and external evaluators' practices and concerns about communicating and reporting evaluation findings. Approximately three-quarters (72%) of a random sample of American Evaluation Association members responded to a survey on this topic. Most of those responding: (1) adhere to traditional reporting formats; (2) are only moderately satisfied with their communicating and reporting efforts; (3) found that insufficient time and political/organizational complexity impedes success in communicating and reporting; and (4) describe effective practice as typically entailing high stakeholder involvement. Internal evaluation was found to be not only equally as prevalent as external evaluation, but different in relation to certain communication and reporting practices.



Rosalie T. Torres

INTRODUCTION

No aspect of evaluation is more fundamental than its use, in particular how we communicate about evaluation activities and report evaluation findings. Over the past 15 years, investigations of the circumstances under which evaluations of projects, programs, and organizations are used by clients and stakeholders have yielded frameworks and models for explaining and facilitating evaluation use in a variety of settings (e.g., Alkin, 1985; Braskamp, 1982; Braskamp & Brown, 1980; Cousins & Leithwood, 1986; Patton, 1986, 1996; Preskill, 1994, 1991; Torres, 1991). Much of this work has focused on how evaluations should be conducted

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Evaluation Practice, Vol. 18, No. 2, 1997, pp. 105-125.
ISSN: 0886-1633

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to improve use through means such as attending to the specific context of the evaluation, involving clients and stakeholders in the evaluation design, and reporting results in a timely manner.

Some studies using simulation approaches have specifically focused on the impact of different communicating and reporting formats and content. For example, Ripley (1985) found that evaluation users are more likely to agree with the evaluator's recommendations if they receive them through a verbal medium, rather than through a written report. Brown and Newman (1982) looked at the influence of the type of data presented on agreement with the evaluator's recommendations. In their review of empirical research on evaluation utilization, Cousins & Leithwood (1986) found evidence about communication style inconclusive. While specific factors about evaluation communicating and reporting have been addressed in the literature, little has been clearly grounded in problems and issues currently faced by evaluators practicing in a variety of different organizational settings and in different roles.

More recently evaluators have turned their attention to articulating the nature of internal evaluation, and its advantages and disadvantages when compared to external evaluation (Cummings, et al. 1988; Love, 1983, 1991; Patton, 1996; House, 1993, 1996; Mathison, 1991a, b; Scriven, 1993; Stenzel, 1991; Winberg, 1991). Yet, we have little empirical documentation of differences in practices between internal and external evaluators.

Both internal and external evaluators face situations which underscore the need for yet better understanding of evaluation practice. These situations include: (a) demands for greater accountability and effectiveness in education and business domains (DeStefano, 1992; Jenlink, 1995; Preskill, 1997); (b) change and complexity within organizations (Preskill & Torres, 1996; Torres, Preskill, & Piontek, 1996); and (c) wider acceptance and use of non-traditional evaluation approaches (i.e., designs using qualitative methods; participatory, collaborative evaluation approaches) (Cousins, Donohue, & Bloom, 1996; Cousins & Earl, 1995; Fetterman, 1994a, b, 1996; Greene, 1992; Greene, Caracelli, & Graham, 1989; Reichardt & Rallis, 1994). The efficiency and effectiveness of communicating and reporting efforts is impacted by and impacts upon all three of these situations.

This study addressed the following specific questions through a survey of a random sample of members of the American Evaluation Association (AEA):

1. What communicating and reporting methods and styles do evaluators use and with what frequency?
2. How satisfied are evaluators with their communicating and reporting efforts?
3. What factors most impede evaluators' success in communicating and reporting?
4. Are specific practices for, experiences with, and perceptions about communicating and reporting different for internal and external evaluators?
5. What kinds of communicating and reporting activities have been most successful?
6. What kinds of experiences with communicating and reporting have been most instructive to evaluators?

METHODOLOGY

The survey included (a) demographic items on current evaluation employment, type of organization, locus of evaluator (internal vs. external), and length of evaluation experience; (b)

Likert-scale items on evaluation practices, reporting formats, audiences, and satisfaction with communicating and reporting efforts; and (c) a checklist of factors that impede successful communicating and reporting. To understand further the nature of evaluators' experiences with communicating and reporting, the survey also engaged respondents in a critical incident technique. That is, they were asked to "Think about an evaluation you have conducted or been involved with in the last 10 years which you feel (a) taught you the most about communicating and reporting, or (b) would be the most instructive to others in terms of communicating and reporting findings."

Respondents were then asked to briefly explain the program that was evaluated, the approach/focus/questions of the evaluation, their role, what they did to communicate and report the evaluation findings, what was particularly successful about these efforts, what was problematic, and what they would do differently.

The Respondents

The response rate for the survey was 72 percent (246), calculated on the basis of 343 possible respondents randomly selected from the entire U. S. membership of the AEA. Of these 246, 16 (7%) identified themselves as never having been involved in conducting evaluations of programs, projects, or organizations. As requested, they returned the survey without completing the remainder. Of the remaining 230 respondents, 33 (14%) identified themselves as not currently involved in conducting evaluations. These respondents then only answered portions of the survey focusing on prior evaluation activities.

Of the remaining 197 respondents currently working as evaluators, 103 (52%) were internal evaluators and 86 (44%) were external evaluators. The institutional settings in which these evaluators worked are shown in Table 1.

TABLE 1
Frequency of Responding Evaluators' Type of Organization:
by Evaluator Position

<i>Type of Organization</i>	<i>Overall</i>		<i>Internal Evaluators</i>		<i>External Evaluators</i>		<i>Did not Specify</i>
	<i>%</i>	<i>N</i>	<i>%</i>	<i>N</i>	<i>%</i>	<i>N</i>	<i>N</i>
College or university	34%	67	48%	32	49%	33	2
Consulting firm (including self employed)	15%	30	—	—	100%	30	—
Non-profit	12%	24	79%	19	17%	4	1
Federal government	11%	22	77%	17	23%	5	—
State government	8%	15	60%	9	33%	5	1
School system	8%	15	87%	13	13%	2	—
Business and industry	3%	5	60%	3	20%	1	1
Local government	1%	3	100%	3	—	—	—
Health care	1%	3	67%	2	33%	1	—
Other	4%	7	57%	4	43%	3	—
No response	3%	6	17%	1	33%	2	3
Totals	100%	197	52%	103	44%	86	8

The respondents' total years in evaluation practice represents an approximately normal distribution. That is, 10% have been conducting evaluations for three years or less, 43% have been conducting evaluations from four to ten years, 36% have been conducting evaluations for 11 to 20 years, and 11% have been conducting evaluations for more than 20 years.

Data Analysis

Descriptive statistics were calculated for 59 quantitative survey items. In addition, non-parametric (Mann-Whitney U, chi-square) tests of significance were run to compare the responses of internal and external evaluators. Where appropriate, mean-difference effect sizes were also calculated.

Of the total number of respondents, 59% (146) responded to the critical incident item. The illustrative cases they wrote varied in detail and length from 5 to 88 lines of text. The illustrative cases were analyzed using The Ethnograph Software (Qualis Research Associates, 1987) for text-based data.¹

PRESENTATION AND DISCUSSION OF FINDINGS

The findings from our research are presented and discussed in five main sections: (a) frequency of communicating and reporting practices, (b) impediments to successful communicating and reporting, (c) factors contributing to success, (d) outcomes of successful reporting, and (e) satisfaction with communicating and reporting efforts.

Frequency of Current Communicating and Reporting Practices

Both internal and external evaluators rely heavily on developing technical/final reports and making verbal presentations in communicating and reporting evaluation results. Table 2 shows the frequency with which respondents currently engage in any of 23 specific communicating and reporting practices. Using the scale shown below Table 2, respondents reported that they "frequently to routinely" write technical/final reports (mean = 3.7); develop written evaluation plans (3.5); write executive summaries (3.5); specifically identify evaluation audiences (3.2); make formal verbal presentations to clients and/or staff (3.1); and develop a reporting plan (3.0). Other less commonly used practices for communicating and reporting also appear in Table 2.

Statistically significant differences between internal and external evaluators were found for several practices. External evaluators indicated that they more frequently (a) write technical/final reports, evaluation plans, executive summaries, reporting plans, interim reports, and journal articles; (b) hold planned personal discussions; and (c) make formal verbal presentations, both to clients and at conferences, than was indicated by internal evaluators for these same activities (p values ranging from .05 to .01). Although the effect sizes for these differences range from only .30 to .47, the findings do appear to reveal a pattern of greater formality in the explicit requirements for reporting that clients hold for external evaluators, who are typically expected to deliver a final report, an executive summary, and often an interim report and/or a presentation on the findings. Also, formal evaluation and reporting

TABLE 2
Mean Frequency of Evaluators' Communicating/Reporting Practices
in Their Current Position: by Type of Evaluator

Communicating/Reporting Practice			Internal		External	
	Mean ^a	%	Mean	%	Mean	%
(Write) technical/final report	3.7	187	3.5	101	3.8**	86
(Develop) written eval. plan prior to implementation	3.5	189	3.4	103	3.7*	86
(Write) executive summary	3.5	188	3.3	102	3.6*	86
(Identify) specifically evaluation audiences (either as part of the evaluation plan or separately)	3.2	188	3.2	103	3.3	85
(Make) formal verbal presentation to clients/staff	3.1	189	2.9	103	3.2**	86
(Develop) reporting plan (either as part of the evaluation plan or separately)	3.0	189	2.8	103	3.3**	86
(Conduct) working session (e.g. with staff for action planning/interpretation of findings)	2.9	189	2.8	103	2.9	86
(Hold) impromptu personal discussions (in person or by telephone)	2.7	189	2.8	103	2.9	86
(Write) short memo(s)/progress reports	2.6	189	2.6	103	2.7	86
(Hold) planned personal discussions (in person or by telephone)	2.5	189	2.3	103	2.8*	86
(Write) interim reports	2.5	188	2.3	102	2.7*	86
(Make) conference presentation	1.9	189	1.7	103	2.2**	86
(Publish) journal articles	1.3	188	1.1	102	2.2**	86
(Write for) internal newsletters	1.1	187	1.2	102	1.6**	86
(Participate in) public meeting	1.1	186	1.0	100	1.1	85
(Provide) news release	.9	188	.8	103	1.0	85
(Write for) external newsletters	.8	187	.9	102	.8	85
(Use) brochure	.6	188	.7	102	.5	86
(Use) photographs	.5	188	.5	102	.5	86
(Hold) press conference	.5	188	.5	102	.4	86
(Make) video tape	.4	187	.5	101	.3	86
(Make) television/radio appearance	.4	185	.3	100	.5*	85
(Use) skit/psychodrama	.1	188	.1	102	<.1	86

Note: Response scale ranged from 0 to 4 where 0 = never, 1 = rarely (<26% of the time), 2 = occasionally (26–50% of the time), 3 = frequently (51–75% of the time), and 4 = routinely (more than 75% of the time).

^aLevels of significant differences (Mann-Whitney *U* test) between mean internal and external evaluators are indicated as follows: *-.05 and **-.01

plans are frequently developed and presented as part of the agreement or contract to do an external evaluation.

Impediments to Successful Communicating and Reporting

In an effort to understand the factors that have most impeded evaluators' success in communicating and reporting findings, respondents were asked (a) to consider all the evaluation work they have done (i.e., in present and past positions); and (b) to select from seventeen possible impediments presented in the survey the five that most impeded their successful commu-

nicating and reporting (see Table 3). They were also specifically asked to describe factors impeding success for the illustrative case they provided. The following sections discuss findings from these qualitative and quantitative data in terms of three main issues: **insufficient time, final reports, and political and organizational complexity.**

Insufficient time The factor most frequently cited as an impediment is insufficient time available to devote to communicating/reporting. One external evaluator said she had, "Insufficient time and inadequate budget for follow-up, and needed several follow-up sessions with selected representatives." Another claimed to have "no major problems other than the limited time available."

Insufficient time is likely related to inadequate numbers of staff to cover evaluation tasks, particularly for internal evaluations. One internal evaluator explained, "Time was a problem. My colleagues and I are stretched too thin." Another said:

We're working to increase the number of people (including school staff) who can interpret and explain aggregate test results to others. We're a small department and simply can't respond to the demand from 90 schools/programs. (internal evaluator)

TABLE 3
Frequency with which Evaluators Indicated Various Factors Impeded Success in Communicating and Reporting Evaluation Findings

<i>Factors Impeding Success in Communicating and Reporting Evaluation Findings</i>	<i>Percent Indicating Factor as an Impediment</i>	<i>N</i>
Insufficient time available to devote to communicating/reporting	53%	121
Clients/audiences unclear about their communicating/reporting needs	47%	106
Client/audience unresponsiveness to communicating/reporting efforts	40%	90
Changes in audiences, organizational/program leadership	38%	86
Insufficient resources available to cover personnel cost for communicating/reporting	33%	74
Inaccurate/incomplete analysis of political context	27%	61
Too many different formats necessary for communicating/reporting to different audiences	26%	60
Misuse/misinterpretation of formal communications/reports by clients/audiences	24%	55
Lack of planning for effective communicating/reporting	24%	54
Misuse/misinterpretation of informal communications/reports by clients/audiences	18%	41
Difficulty in balancing positive and negative findings	17%	39
Language/style used in communicating/reporting not clearly understood by audiences	15%	35
Difficulty in integrating findings across multiple sites	13%	29
Inadequate/insufficient training in communicating and reporting	11%	25
Insufficient resources available to cover materials costs for communicating/reporting	11%	25
Insufficient resources available to cover technology costs for communicating/reporting	11%	24

Relatedly, one-third of respondents cited insufficient resources available to cover personnel costs for communicating/reporting.

Insufficient time is also a likely cause for lack of planning for effective communicating/reporting — which was cited as an impediment by approximately one-quarter (24%) of the respondents. And, of these evaluators, significantly more internal evaluators cited this factor than did external evaluators ($p < .05$). This finding represents the only statistically significant difference between internal and external evaluators on the frequency with which they cited any of the factors listed in Table 3². And in those cases where planning does occur, there may be concerns about the accuracy of that planning. For instance, one external evaluator wrote, "It took more time than predicted, as usual." Time is an issue in later stages of the evaluation as well. Just over one-third (36%) of the respondents cited insufficient time for analysis/interpretation of findings as a stumbling block.

Final reports. Almost all instances of evaluators describing an ineffective reporting format in their illustrative cases had to do with writing lengthy final reports — a time consuming process in and of itself. They told of circumstances all too well known by most evaluators — where response to final reports is negligible to non-existent, calling into question whether they are read at all.

I asked for a meeting with program staff and funders six months before the end of the program to review with them what they would want from the evaluation report. In spite of all the positives all along I never had any response to the evaluation report. (external evaluator)

The evaluation reports to the superintendent and principal seemed least successful because there was no reaction from them. (internal evaluator)

Despite our long-standing knowledge of the likelihood of this situation (National Science Foundation, 1969; Weiss, 1977), evaluators seem committed to full documentation and presentation of data in the tradition of basic social science research. As one external evaluator wrote, "My early reports were too verbose, I found out that most administrators appreciate summaries. Lengthy documents were put on hold."

Moreover, final/technical reports typically follow an academic/scientific style which some illustrative case writers described as an ineffective means of communication:

Wrote an academic type final report which was not what client wanted — inadequate communication about the final product. (external evaluator)

The board was quite naive to evaluation and we were quite naive re: reporting to boards. We learned that you must make information understandable to persons without any background in stats and scientific methods. (external evaluator)

The journal format [we used] was not particularly innovative and will probably not result in widespread use of the report. (evaluator's employment locus not specified)

Some 15% of the respondents reported that audiences did not clearly understand the language and style used in communicating/reporting. This impediment may be related to the tendency of many evaluators to follow well-known social science formats in their reports.

Political and organizational complexity. This study identified six impediments relating to political and organizational complexity which evaluators face in their work. They are (a) lack of clarity about communicating/reporting needs, (b) unresponsiveness to commu-

communicating/reporting efforts, (c) client/audience turnover, (d) politically charged situations, (e) resistance to negative findings, and (f) misinterpretation of findings.

Clients/audiences being unclear about their communicating/reporting needs was the second most frequently cited impediment (47% of respondents, see Table 3). One external evaluator put it this way:

[We encountered clients] changing their minds about what they wanted and when — testimony, no testimony, timing of the report, etc. Don't know what to do differently - we have no control over this.

Other illustrative case writers spoke in terms familiar to many evaluators: “[those asking] for the evaluation...not really knowing what they wanted” (external evaluator), “[clients being] initially uncertain of or unclear about the focus of the evaluation” (external evaluator), and “audiences who tended toward the ‘it would be nice to know’ syndrome” (internal evaluator).

Over one-third (40%) of respondents cited *client/audience unresponsiveness to communicating and reporting efforts* as an impeding factor. Respondents described situations in which client(s)/audience(s) were unresponsive to communicating and reporting efforts, and sometimes to the evaluation in general:

I hope never to take another assignment where the evaluation is not desired, nor of interest to those on site. (internal evaluator)

They really do not want to/cannot put time into the effort. (internal evaluator)

[Program] isn't really interested in a valid evaluation, and our final report will indicate same. (external evaluator)

Most of the audience viewed the results as a technical problem that they did not want to become involved with. In short, they had bigger fish to fry. (external evaluator)

These comments echo what has long been discussed in the use literature — that evaluations often must compete with many activities and types of information for the clients' time. Although we do not have complete information about the extent to which these evaluations used collaborative approaches, doing so might have increased client/audience commitment and ownership of the evaluation.

An impediment related to lack of clarity about communicating/reporting efforts as well as client/audience unresponsiveness might well be *turnover among clients/audiences*. Almost 40% of the respondents cited changes in audiences and/or organizational/program leadership as an impeding factor (see Table 3). The following excerpts from the illustrative cases explain the unexpected nature of these changes and their impact:

Key personnel of sponsoring organization changed during course of evaluation. Resulted in a change in expectations for program being evaluated. New personnel had criteria for success/failure. Requested categories for findings not key to original programming, resulted in general impression of failure for programming. [In the future I] might refuse to report on inappropriate findings...would be more sensitive to impact of personnel changes on evaluation. (external evaluator)

The council which owns the project wants to make all decisions about analysis, reporting, revision of method, etc. However, turnover in membership means we always start at ground zero. (internal evaluator)

After I submitted my final report, my supervisor and state coordinator of program left for a one year position [elsewhere]. I am concerned what will happen with the evaluation results....I would have written interim reports so as to reach those individuals who missed my presentation at meetings. (internal evaluator)

Having to deal with new clients/audiences creates a new set of expectations about the evaluation — some of which are not always clear or appropriate to the original evaluation approach.

In their illustrative cases, by far the greatest number of respondents *described politically charged situations* as hindrances to communicating, reporting, and using evaluation findings. One internal evaluator put it simply, "Clients often have hidden agendas." The excerpts below speak to various political difficulties in the processes of communicating findings and using findings.

Getting the policy/planning group to act on the results [was difficult]. Local politics and organizational politics interfered with using the information. (internal evaluator)

Highly emotional issues in teachers and community. Shortage of budget funds to implement recommendations. Union issues to overcome in implementation. (internal evaluator)

Highly political. Strictly formative from our point of view, but [client] didn't want to understand that. (internal evaluator)

It was...the first time we've looked at a judicial branch agency. Turf protection was a hindrance. (external evaluator)

I was told by county staff that any evaluation or research done would be seen as a sign of over funding and would lead to program reductions. (internal evaluator)

The evaluation time frame and the intensely politically charged environment made the report into a ritual more than anything else. (evaluator's employment locus not specified)

Most of these situations were described as inherent to the program setting and beyond the control of the evaluator. Also, most occurred in internal evaluations. It seems unlikely that internal evaluators encounter politically charged situations any more than do external evaluators. It is probable, however, that they are more aware of and sensitive to the politics of the organizations in which they work, and better able to discern political influences.

While not one of the most frequently cited impediments, overall, just over one-quarter (27%) of respondents did cite *inaccurate/incomplete analysis of the political context* as one of their most impeding factors (see Table 3). And although citing this as an impediment did not differ significantly between internal and external evaluators, the majority of illustrative cases addressing it were provided by external evaluators. External evaluators are commonly thought to be at a disadvantage in analyzing and understanding a program's political context. An external evaluator described how they would have worked harder in the beginning to do so:

The school committee reflected the division between townies and yuppies and the hostility emerged at the meeting. If I had to do it all again I would have started with in-depth interviews with the school committee members even though the budget for the evaluation was minimal. Hot political issues should perhaps be addressed early with the most involved and powerful individuals, however distasteful the prospect of the session.

The other major lesson evaluators learned from situations where they had incompletely analyzed the political context was to involve stakeholders in the evaluation process:

Two lessons I learned the hard way: 1) to communicate often with the administrators who will be the recipients of the final product during the course of the study. In this way miscommunication can be avoided and any mid-course corrections in evaluation methodology can be accomplished if needed. 2) to send out the draft report with results and study recommendations for comments to the affected individuals before issuing a final product. (external evaluator)

The evaluator needs to work through...defensiveness and use evaluation results to appeal to the staff's desire for excellence in service....I would have provided more interim and progress updates on the project which took one and one-half years to complete. Would have gotten staff and board/administration more involved during the project rather than waiting until end. (internal evaluator)

The very top level person was screened from knowledge of the project without our knowledge. We thought he had been appraised of the project and was being kept up to date....Second level executive did not think he would agree with purpose of the project. When top level executive found out, he killed the project. It reduced the ability of staff to communicate to management. We should have insisted on a meeting with the CEO. (evaluator's employment locus not specified)

These illustrations stress that not only must communication and collaboration take place, but it must begin early in the evaluation process.

Another circumstance often associated with organizational politics is *resistance to negative findings* from the evaluation. Although we did not ask this question explicitly in our survey, numerous evaluators characterized this as an impediment, providing comments such as the following:

Criticized our technique and called us negative people. (internal evaluator)

There was wholesale coverup of the key interpretive findings. The results were seen as an indictment. (internal evaluator)

Became clear the client was not interested in an objective evaluation. We went ahead and did in effect an evaluation which would have pleased our professors but did not please the client or get any action. (internal evaluator)

Developers wanted to hear only positive findings. (internal evaluator)

[They] were very defensive about anything we said that might have been seen as negative or too critical. (external evaluator)

Most of these excerpts came from internal evaluators. It could be that program participants have a greater expectation that evaluators employed by their organizations will reflect their programs more positively than would external evaluators. Indeed, external evaluators are sometimes employed by organizations with internal evaluators to avoid political pressures often applied to those who work within the organization. In some cases resistance to negative findings is likely related to *difficulty in balancing positive and negative findings* — which 17 percent of the respondents cited as one of their most impeding factors.

Misuse/misinterpretation of formal communications/reports, although not one of the most commonly cited impediments, was cited by about one-quarter (24%) of respondents as one of their five most impeding factors (see Table 3). Issues about misinterpretation are varied. The following two excerpts from illustrative cases describe misquotation and distortion:

Results were commonly misquoted by both supporters and opponents. (evaluator's employment locus not specified)

The local newspaper was at the school board meeting and totally distorted our findings in the next day's news, then the local TV people picked up the story - it was one disaster after another. (external evaluator)

Other case writers told of various forms of oversimplification of findings:

Some faculty members seem to tend to reduce data to single dimension judgements (good/bad) especially when data have a generally favorable cast. (internal evaluator)

Higher level stakeholders wanting to dwell only on executive summaries without looking at the problem areas in an integrated way that might have led to a better understanding of several complex issues prior to decision making. (internal evaluator)

Although no significant differences were found between the numbers of external and internal evaluators citing misuse/misinterpretation as an impediment, many of the cases cited above are from internal evaluations. One might expect that greater opportunities for misinterpretation would occur with external evaluations. However, competing priorities for other work may mean that internal evaluators have no more time to facilitate the accurate use of findings among clients/audiences within their organizations than do external evaluators with clients/audiences who are outside their organizations. Patton (1996) explains that internal evaluators frequently are asked to comply with time consuming requests for minor data-gathering and report-writing activities.

For the most part, the situations above describe misuse or misinterpretation of formal evaluation reports. Generally, respondents were less concerned about *misuse/misinterpretation of informal reports*. Only 18 percent cited this as an impediment.

Finally, 15% or fewer respondents cited the following impediments: their language/style not being understood by clients, difficulties in integrating findings across multiple sites, inadequate training in communicating and reporting, and insufficient resources available to cover materials or technology costs for communicating and reporting.

Factors Contributing to Success

In recounting instructive experiences with communicating and reporting evaluation findings, respondents also specifically addressed what they found to be "particularly successful about these communicating/reporting efforts." In their illustrative cases, they told of *successful reporting formats, the content of successful reports, and processes used in successful reporting*.

Format: Several respondents specifically mentioned the effectiveness of executive summaries for "communicating the evaluation story." While writing executive summaries is a common practice among evaluators (see Table 2), some evaluators also described the effectiveness of other types of short reports and summaries:

Brochure was very effective in reporting to state board of ed. rather than the technical report. In other words, know your audience and don't give them more than they want to know. (external evaluator)

In our department we don't write long reports anymore. My boss' decision, not mine, but he was sure right. (internal evaluator)

Involved the people in thinking about implications, short enough for people to read quickly....Flashier appearance of the short reports [was successful]. (evaluator's employment locus not specified)

After each site visit, sent a written memo summarizing key findings. They were short, very focused on 2-3 points. If possible, and it did not always occur, tried to meet in person/talk on telephone with staff about the memo...Turnaround was quick, very focused, promoted dialog. (external evaluator)

Among these excerpts are references to **tailoring reporting formats to specific audiences**. Such tailoring includes using language appropriate to the audience. Some respondents addressed this point specifically:

The language was appropriate for each audience (student, professional, administrator, bureaucrat, taxpayer-citizen).... (internal evaluator)

Terminology/definitions...interfered with understanding. Together we [client and evaluator] derived language which was accurate... and at the same time the client comprehended. Also client knew exactly what to expect. (evaluator's employment locus not specified)

We emphasize translating the data into visual images and minimizing the jargon and technology. (evaluator's employment locus not specified)

The use of graphs and charts was also stressed by numerous as important to successful reporting; for example:

Lots of interest...Board presentation used a number of simple diagrams and was easy for them to follow. (internal evaluator)

Reported with graphics and word tables, and used an artist [to create illustrations]...Char- treuse color cover. Presentations...used charts prepared by graphics experts to summarize and communicate findings...Made audiences understand and take note of findings, brought attention to the issues. (evaluator's employment locus not specified)

Findings were reported [separately] to staff, director, parents, and board orally with graphic displays. (external evaluator)

In general, these successful formats provided vivid, concrete illustrations of findings, and allowed audiences to assimilate information quickly and easily.

Content Overall, in their illustrative cases, evaluators had the least to say about the specific content of successful communications and reports. Yet, some of their commentary focused on providing both positive and negative findings, and providing qualitative, contextual data:

Although detailed information is submitted in a formal report during meetings, I communicate critical findings — positive and negative — in table format or in bullet format for easy comprehension....If qualitative information is collected, I provide samples of respondent comments or brief descriptions of settings. To comprehend findings clients need contextual information. (external evaluator)

Negative findings were provided as informative rather than judgmental. Included qualitative info (e.g., client statements) as well as numbers. (internal evaluator)

This advice is reflected in the Joint Committee's (1994) program evaluation standards which call for context analysis, and full and fair reporting. Other commentary emphasized **providing direction for action, i.e., recommendations**.

Final report...stressed what we've learned — how to organize future/continue projects.
(external evaluator)

Supplying specific action-oriented recommendations is long-standing advice for increasing the usefulness of evaluations (see Drezek, 1982; Hendricks & Handley, 1990; Hendricks & Papagiannis, 1990; Morris, Fitzgibbon, & Freeman, 1987; Stallworth & Roberts-Gray, 1987).

Process Respondents described the processes of successful reporting as focusing primarily on early collaboration with and involvement of stakeholders in the overall conduct of the evaluation, and especially in interpreting findings.

A major lesson is to involve those affected by and interested in the evaluation in every major step of the process....Clinicians and administrators were encouraged to work with their own data, derive their own conclusion and to discuss them in public with the evaluator and each other. Confidence in evaluation was increased as a result. (internal evaluator)

Communication does not end with analysis and report but should be followed up by onsite visits and interpretations jointly with the program staff. (internal evaluator)

Small group meetings gave teachers an opportunity to own the results, discuss the strategies and form their own recommendations based on the results. (internal evaluator)

Our recommendations were implemented — more because of the involvement we had with all concerned parties than with the reporting per se. Our ongoing communication helped us understand and use their language so they understood us. (external evaluator)

Big formal 150 pages plus a casual two-page memo. No one ever read the report, one person read the memo. All else was based on chats....We wrote a report only for the record — all real communication is based on chats. (evaluator's employment locus not specified)

Numerous evaluators were particularly articulate in relating how the use of all of these reporting strategies — short reports, graphs and charts, clear language, and early, continuous communication and collaboration — was successful:

Developed a summary report using charts and graphs, reported directly to the sponsoring group on a personal small group situation. Follow up data presented in newsletters... (internal evaluator)

Write reports and sections within sections front to back -assume reader only reads first page carefully. make your key points and findings at the beginning, it is not a novel so don't build to the end. Place all but the absolutely necessary methodology and complex data in the appendix. (evaluator's employment locus not specified)

Simplicity, visuals, easy to read charts and bulleted lists that can provide the basis for discussion, guidance, modifications or changes, plus a collaborative approach are the keys to effective communication and reporting for me. (external evaluator)

Outcomes of Successful Reporting

Not only did our illustrative case writers describe factors contributing to the success of their communicating and reporting efforts, they also described specific outcomes of their

efforts. From what they said, we identified three outcomes related to both the evaluation process and the evaluation findings. Each is discussed below.

Greater understanding of and appreciation for evaluation. Many respondents emphasized that a greater understanding of and appreciation for evaluation was as important an outcome as the findings of the evaluation itself. The following representative quote shows how this resulted in continued evaluation activity.

The evaluator considered a major objective of the study to reduce the anxiety of the participants about evaluation activities and to give staff a success experience when they worked together on a potentially controversial topic. To some extent, the process of this evaluation was more important than the typical evaluation outcome — a written report for the archives. As a result, those participating have continued to generate additional findings and hypotheses even after the final report was delivered. To some extent evaluation is now seen as a continuous process within and between service agencies rather than a one-shot activity. (internal evaluator)

Involving people in the evaluation was described as helpful in furthering the implementation and purpose of the evaluation. Specifically, respondents reported that collaboration with program participants resulted in a clearer understanding of expectations for the evaluator and evaluatee.

Enhanced understanding of the program. Stakeholders' enhanced understanding about the program being evaluated occurred when evaluators used effective reporting formats and involved clients/audiences in the process. When evaluators provided their findings in easy to read formats and used graphics to present them, they found clients much more open and receptive to results. Specifically, doing so "made clients aware of certain issues they could not ignore," "helped clients gain a more in-depth understanding of the data," "provided members with a reality check and broadened staff's thinking about the program," and "gave clients the sense that they owned the results and were able to form their own recommendations, thus providing for greater use." Interestingly, all of these outcomes were articulated by internal evaluators, who are likely — because of their longer-term relationships — to have a better sense of both the subtle and profound impact of their work.

Actions taken as a result of the evaluation. Although evaluators have long lamented the lack of instrumental use of their findings, numerous respondents specifically described actions taken and changes made as a result of successful communicating and reporting. In the illustrative cases examples were given of evaluations that resulted in action plans, program changes (including revisions and expansions), personnel changes, recruitment of participants, and continued support of programs.

Satisfaction with Communicating and Reporting Efforts

Given what evaluators responding to our survey said about their experiences with communicating and reporting, one might wonder how satisfied they are, overall, with this aspect of their work. Table 4 shows evaluators' level of satisfaction with their communicating and reporting efforts, categorized by the number of years they have been conducting evaluations.

TABLE 4
Evaluators' Satisfaction with Their Communicating and Reporting Efforts:
By Years Conducting Evaluations

<i>Years Conducting Evaluations</i>	<i>Mean Satisfaction</i>	<i>N</i>
Less than 1 year to 3 years	3.0	22
4 to 10 years	3.3	95
11 to 20 years	3.6	80
20+ years	3.8	26
Overall	3.4 ^a	223

Note: Survey question asked respondents to rate their satisfaction based on all evaluation work they have done in past and present positions. Response scale ranged from 1 to 5 where 1 = not satisfied at all and 5 = very satisfied.

^aKruskal-Wallis one-way analysis of variance significant at $p < .01$.

Overall, evaluators are only somewhat satisfied with their communicating and reporting efforts and outcomes (mean = 3.4, where 1 = not satisfied at all and 5 = very satisfied). The data in Table 4 show that the more experienced evaluators are, the more satisfied they are with the outcomes of their communicating and reporting efforts ($p < .01$). On average, evaluators practicing for less than one to three years are at the mid-point on the satisfied-dissatisfied scale (mean = 3.0), while evaluators practicing for 20 years or more are at least moderately satisfied (mean = 3.8).

Finally, internal evaluators (mean = 3.2) are significantly ($p < .001$, effect size = .58) less satisfied with their communicating and reporting efforts and outcomes than are external evaluators (mean = 3.7). Lower satisfaction for internal evaluators, perhaps mediated by the political constraints and complexities they experience within organizations, is not surprising. Further, their less frequent use of more formalized communicating and reporting practices may contribute to their lower level of satisfaction.

SUMMARY

These findings about actual communicating and reporting practices lead us to four major conclusions. First, they confirm much of what the evaluation literature describes as good practice — attending to the specific context of an evaluation, involving clients and stakeholders in the evaluation design, using clear language, and reporting results in a timely manner to a variety of audiences. Evaluators describing successful communicating and reporting experiences had provided information in a form that could be quickly and easily assimilated — using verbal presentations, discussion, and interaction at meetings and in informal exchanges; short, cogent reports; clear, jargon-free, familiar language; and graphics and other formats which relate and integrate information visually.

The content of these communications included quantitative and qualitative information, descriptions of context, positive and negative findings, and specific recommendations. Further, they described how success came through communication with clients and other stakeholders throughout the evaluation process. Communicating and reporting was part and parcel

of the entire evaluation endeavor — not something undertaken at the end of the evaluation process.

Second, we found that while some evaluators report that they successfully implement these strategies, others reported that they are thwarted in their efforts by time, organizational, and political constraints. The majority of impediments evaluators frequently cited relate to working with the individuals and organizations involved with the programs being evaluated. The issues these evaluators face include lack of clarity about needs for communicating and reporting, unresponsiveness, organizational and personnel changes, and inaccurate or incomplete analysis of the political context. In their illustrative cases, evaluators specifically described politically charged situations dealing with hidden agendas, turf protection, and gate-keeping. They detailed instances where resistance to negative findings hindered their efforts, and in some cases misinterpretation of results prevailed. Yet, some evaluators reported they were able to manage these challenges by taking a more collaborative approach they found useful in mediating these complexities.

Third, and not surprisingly, we found that most evaluators are only somewhat satisfied with their efforts. We also found that satisfaction with communicating and reporting comes with experience. One could infer that this would stem, at least in part, from more experienced evaluators having improved their skills in these critical areas.

Fourth, we found the practice of internal evaluation to be different from external evaluation in several important ways. Internal evaluators less frequently engaged in many formal practices commonly expected to facilitate use — namely, developing evaluation and reporting plans, writing executive summaries, making formal verbal presentations, writing interim reports, and holding planned personal discussions (see Shadish, Cook, & Leviton, 1991; Patton, 1986, 1996). Internal evaluators in our study also cited lack of planning for communicating and reporting as an impediment to success significantly more frequently than did external evaluators. While not startling, these differences should be kept in mind when considering how communicating and reporting may best be carried out in each of these two contexts.

DISCUSSION: DRAWING ON DATA AND EXPERIENCE

In the remainder of this article, we draw not only on the findings presented here, but also on our own experience as evaluators to try to build linkages that will help evaluation practitioners improve their communication and reporting in their own work. We discuss the meaning and implications of our research, viewed through the lens our experience affords, in terms of four major issues: collaboration, social science research orientation, internal and external evaluation, and satisfaction and experience with communicating and reporting. We conclude with suggestions for further research on communicating and reporting, and on internal and external evaluation.

Collaboration³

The results of this study — particularly those from the illustrative cases — make clear that issues related to communicating and reporting evaluation findings are of concern throughout the evaluation process, not just at the time that final reports (or other end-products of the evaluation) are typically expected. Early, ongoing communication and collaboration were identified by evaluators in two ways: first, as strategies which they feel would have

reduced or even prevented frustrations they experienced; and second, as a contributor to helping things go right when they did. This finding echoes our experience and Patton's long-held position (1978, 1986, 1996) that evaluation use must be included in the initial evaluation plan and attended to throughout the evaluation.

Communication and collaboration take time. Yet, lack of time is the single factor most plainly implicated in this study as an impediment to these processes. As described in this study's illustrative cases, and as we have found in our experience, time well spent would find evaluators (a) communicating with participants and stakeholders of varied levels about evaluation purposes and processes; and (b) involving these individuals in the design, data collection, analysis, interpretation, and follow-up phases of the evaluation. Evaluators in this study indicated that doing so informed and educated clients/audiences about evaluation, sensitized evaluators to individual perspectives and organizational contexts, clarified mutual expectations, and increased client/audience capacity for using the evaluation findings — whether it be to shape their understanding of the program or to make a specific decision. In short, their responses suggest that involving clients/audiences in a well-conceived evaluation process increases the credibility of the effort, enhances audiences' understanding of both evaluation and the program, and increases the possibility that reflection and action will follow. These findings may come as no particular surprise to experienced evaluators, many of whom have come to regard this as common knowledge, even though we previously have had no supporting data.

Social Science Research Orientation

The single major impediment to successful communicating and reporting cited by evaluators in our study is time. Of particular concern is the time it takes for the analysis and interpretation of findings. Moreover, analysis and interpretation of findings is a consuming aspect of developing final reports — which is the most frequently practiced means of communicating and reporting findings. On average, respondents in our study indicated they routinely produce final/technical reports when they do evaluations. Indeed, typical expectations dictate that evaluators generate comprehensive final reports which can often be lengthy and time-consuming to write. In this regard, current evaluation practice is following social science traditions and basic research training most evaluators received and continue to provide students of evaluation. This tradition is generally reflected in many texts on evaluation (see e.g., Popham, 1993; Morris, Fitz-Gibbon, & Freeman, 1987; Posavac & Carey, 1992, 1997; as well as *The Program Evaluation Standards* (Joint Committee, 1994). Scriven (1993) explicitly links evaluation reports that look like social science research reports with attempting to show that program evaluation is applied social science. He finds this format “almost useless for most clients and audiences” (p. 77). Alkin (1990, p. 160) worries “about the extent to which...[evaluators] become so involved...with the end result of producing a report for peer review, that [they] fail to serve the evaluative needs of the situation.”

Likewise, our findings and our experience suggest that evaluators may be spending too much time generating such reports in lieu of other reporting methods. It is unclear that such reports provide the most cost-effective means for communicating evaluation findings in ways most useful to stakeholding audiences.

Given the heavy reliance on final/technical reports and evaluators' moderate satisfaction with the outcomes of their communicating and reporting efforts in general, it would seem useful to consider the potential of using non-traditional communicating and reporting approaches

for different types of evaluation activities. Important questions for evaluators to consider are: Should most evaluation studies result in comprehensive, often lengthy reports? Would other methods — photographs, debriefing sessions and newsletters, for instance — lead to greater instrumental and conceptual use with some clients and audiences? (See Torres, Preskill, & Piontek, 1996). As one respondent commented, "Frankly, we have more creative ideas about reporting/communicating than we have time to implement. Time and resources are constraining." Our greatest challenge may be to give up the familiar for the new in our practice.

Internal and External Evaluation

Approximately one-half of the 197 evaluators responding to our survey who currently practice evaluation are internal evaluators. This equity is important to consider since many evaluation models used in the training of evaluators in the 1960's, 70's, and 80's were developed from the perspective of external evaluators (see e.g. Guba & Lincoln, 1990, Scriven, 1973; Stake, 1983).

This study helps provide needed description and understanding of internal evaluation (Mathison, 1991a) by documenting clear differences between the practice of internal and external evaluators. Comparing the two makes even clearer the challenges posed in working with complex, constantly changing, politically charged organizations. Some of the differences we found are likely, at least in part, to be caused by the organizational and role complexity internal evaluators experience (Love, 1991; Mathison, 1991b). Increased demands on internal evaluators to respond to organizational needs and circumstances may well absorb time and energy they might otherwise have for more effective communicating and reporting practices. Moreover, internal evaluators are significantly less satisfied with their communicating and reporting efforts than are external evaluators. The issue may not be so much that different practices are more effective for one type of evaluation than the other, but rather that internal and external evaluators face different challenges in carrying out effective communicating and reporting strategies.

Satisfaction and Experience

Given what we have learned from our experience and our research on communicating and reporting, it makes some sense that while satisfaction with these facets of evaluation is generally low, it does increase with experience. Only after at least four years of practice did our respondents' overall satisfaction shift, albeit slightly, from neutral to somewhat positive. Increased skills and confidence likely contribute to greater satisfaction. With more experience, evaluators better understand various organizations and audiences. In spite of this learning, however — time, resources, and political and organizational complexity — still pose challenges to the success of communicating and reporting efforts.

Based on our findings about what works and doesn't work, continued discussion and reflection among ourselves of what it means to practice both internal and external evaluation, how we can train future evaluators, how we can make evaluation information easier to assimilate, and how we can enrich evaluation practice for both clients and evaluators is more vital than ever. Further, this study and discussion would be significantly enhanced by including the perspectives of our clients and stakeholders. Far too little recent research on evaluation has collected empirical data from evaluation users. Questions to address include: Are clients/users of internal evaluations more or less satisfied than clients/users of external evaluations? To

what extent does the use of various alternative forms of communicating and reporting satisfy clients' needs? How satisfied are evaluators themselves with the use of alternative communicating and reporting methods? Given the constraints, complications, and competing demands evaluators in this study described, one thing we can be sure of is that success in evaluation communicating and reporting only follows hard work. Here again we find affirmation of what evaluators have long known and discussed among themselves: Evaluation is a complex, interdependent, demanding, challenging, and sometimes rewarding endeavor.

NOTES

1. In all, 110 codes in eight categories were generated for the qualitative analysis of these data. These categories and codes were modified in three iterative cycles to maximize their fit with the data. The final categories were (a) type of program evaluated, (b) approach/focus/questions of the evaluation, (c) role of the evaluator, (d) communicating/reporting formats used, (e) audiences addressed, (f) successful formats/processes used, (g) factors impeding success, and (h) outcomes of successful reporting.
2. For this reason, data are not reported separately in Table 3 for internal and external evaluators.
3. We define collaboration to mean ongoing communication and interaction with clients and stakeholders throughout the evaluation process, including their involvement in decisions about the conduct of the evaluation.

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