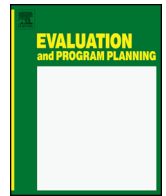




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Book review

Empowerment evaluation is a systematic way of thinking: A response to Michael Patton

Empowerment evaluation: Knowledge and tools for self-assessment, evaluation capacity building, and accountability.

We embrace this critique as an opportunity to reflect on our practice and further clarify and refine empowerment evaluation.

1. Empowerment evaluation is a systematic way of thinking

The essence of EE is a systematic way of thinking, not a single principle, concept, or method. Empowerment evaluation, first and foremost, helps people evaluate their own programs and initiatives. It is the use of evaluation concepts, techniques, and findings to foster improvement and self-determination (Fetterman, 1994, 1996, 2001; Fetterman & Wandersman, 2005; Fetterman, Kaftarian, & Wandersman, 2015; Fetterman, Delaney, Triana-Tremain, & Evans-Lee, 2015). It is an evaluation approach that aims to increase the likelihood that programs will achieve results by increasing the capacity of program stakeholders, to plan, implement, and evaluate their own programs (Fetterman & Wandersman, 2007).

It is the gestalt or whole package that makes it work. Empowerment evaluation theory, concepts, principles, and steps are used to guide practice. Patton's critique is off-target because it focuses on individual parts or principles, failing to recognize that empowerment evaluation is more than the sum of its parts (including "essential" parts). Clinton and Hattie capture the big picture when they apply empowerment evaluation to their work. They focus on a way of thinking. In their case it is summarized as: "know thy impact" (2015). Together empowerment evaluation ideas, values, and practices help people learn how to think like an evaluator. They build their evaluation capacity in the process of evaluating the impact of their own work. This approach to evaluation fosters improvement and self-determination.

2. Core or essential features

Patton commends the authors for doing a "great service of clarifying what constitutes the core of empowerment evaluation." We presented the theories, concepts, principles, and steps guiding empowerment evaluation. However, his focus was almost exclusively on the principles. The 10 guiding principles were highlighted in each chapter, including: (1) improvement, (2) community ownership, (3) inclusion, (4) democratic participation, (5) social justice, (6) community knowledge, (7) evidence-based strategies, (8) capacity building, (9) organizational learning, and (10) accountability.

We explained how these principles work together synergistically. For example, the first principle, improvement, reflects the pragmatic and utilitarian nature of empowerment evaluation. The

aim is to help people improve their programs and practice and succeed in accomplishing their objectives. Community ownership is required to make this happen in a meaningful and sustained manner. This is linked to process use. The more people take ownership of the evaluation, the more committed they are to using the evaluation findings and follow through on the recommendations. Authentic community ownership requires inclusion. It cannot be a single elite group making all the decisions. People from all parts of the organization and/or community should be to be included. Participation from many stakeholders, including those typically marginalized or excluded, is critical if the effort is to be credible and taken seriously. It is also more efficient to include major stakeholders at the beginning rather than having to re-visit each of the issues every time a new group is invited to participate in the group.

The same type of synergy and interconnectivity applies to the remaining combination of principles (see Fetterman & Wandersman, 2005, p. 210–212 for details). The interaction among the participants and the principles results in a rising level of empowerment and self-determination (see Fetterman & Wandersman, 2005, pp. 213, Fig. 9.1 for a visual representation of the fluid capacity of empowerment and self-determination in a social container).

3. A constellation of fidelity: "zero" is not an option

Patton states empowerment evaluation can be applied with "zero" levels of adherence to the principles. He refers to this as a "pick-and-choose menu". This is an inaccurate understanding of the approach. Patton confuses principles designed to guide practice with fidelity to a model. We do not agree with his assumptions, which isolate principles from each other and the larger values shaping the approach. Like developmental evaluation's essential elements, empowerment evaluation's principles are interconnected, interrelated, and reinforcing. It is that interconnected nature of empowerment evaluation that gives it strength and sustainability.

More to the point, empowerment evaluation is conducted within a constellation of theories, concepts, principles, and steps as discussed in our book. Fidelity to a worldview, with the guidance of a model, is a more useful conception of how empowerment evaluation works.

4. Context matters

Cousins' critical friend chapter in our earlier book, *Empowerment Evaluation Principles in Practice* (Fetterman & Wandersman, 2005), explained how empowerment evaluation depends on

“which combination of principles are most important, given the needs of the local context and the impetus for the empowerment evaluation in the first place” (p. 201).

Cousins' observation does not imply zero application of the principles. It simply reaffirms the importance of adapting empowerment evaluation to the local context and needs of the community and/or initiative. A more reasonable interpretation would be that empowerment evaluation is not a one-size fits all approach. It is adapted to local circumstance, conditions, and needs.

However, Cousins' observation represents the background, not the foreground of empowerment evaluation. Empowerment evaluation is not anything to anyone depending on one's perspective or set of local concerns. It is a specific way of thinking and acting, helping people conscientiously assess the impact of their work, that is shaped, not driven, by local conditions.

5. Arbitrary judgment: 8 versus 10 essential elements

Patton's focus on the principles extends to the number of principles. He suggested: “10 empowerment evaluation principles seemed like a lot to manage” (Patton, 2015, p. x). However, he states that “all 8 essential elements of developmental evaluation must be manifest to some extent and in some way” to merit that label. It does not appear to be intellectually defensible to argue that 8 elements are manageable for developmental evaluation and 10 are not manageable for empowerment evaluation. This judgment seems arbitrary.

6. Weaving a tapestry with the threads of empowerment evaluation: ownership, capacity building, and accountability

We published *Empowerment Evaluation Principles in Practice* (Fetterman & Wandersman, 2005) because we recognized that many of the principles were implicit and it was time to make them explicit to better inform and guide practitioners (see Fetterman & Wandersman, 2005; Miller & Campbell, 2006; Fetterman & Wandersman, 2007). In addition, we described high, medium, and low levels in practice, depending on local conditions and the levels of evaluator, community, and funder commitment to the 10 empowerment evaluation principles in practice (see Fetterman & Wandersman, 2005, pp. 55–72).

Empowerment evaluation principles are like the principles of a democracy, such as free speech and freedom of religion. Democracies vary throughout the world. Failure to equally and consistently apply all the principles of a democracy at maximum levels, does not mean they are not a democracy. In addition, selecting only the “essential” principles of a democracy in a social and cultural vacuum, privileges some principles and unintentionally minimizes the value of others. They are all needed to fully and faithfully implement a democracy.

Three empowerment evaluation principles have been selected to help highlight the holistic nature of empowerment evaluation. Ownership, capacity building, and accountability principles are important threads of empowerment evaluation. A brief description of these principles demonstrates how together they weave a way of thinking and acting, into the tapestry of empowerment evaluation. (These three have been selected for illustration purposes. This example is not designed to minimize the need to apply as many principles as possible in a given effort.)

6.1. Community ownership

People have the right to make decisions about actions that affect their lives. Putting evaluation in the hands of program staff and participants is thought to foster self-determination and

responsibility instead of dependency. In addition, as stated earlier, empowerment evaluation is guided by the theory (process use) that people are more likely to believe and use findings and follow recommendations if they were responsible for creating them.

6.2. Capacity building

Stewart Donaldson made an astute observation in the Foreword to our book concerning critical guiding principles: “empowerment evaluation's respect for community knowledge and commitment to the people's right to build their own evaluation capacity has influenced the evaluation mainstream, particularly concerning evaluation capacity building” (p. viii).

In addition, it is no accident that we added “evaluation capacity building” to the title of our new edition. On page 7 we state: “this book brings to the surface a central theme in empowerment evaluation: evaluation capacity building” (Fetterman et al., 2015). Empowerment evaluation's emphasis on capacity building and process use helps people think like evaluators. Evaluation capacity building is related to producing outcomes (see Labin, Duffy, Meyers, Wandersman, & Lesesne, 2012). If there is no capacity building, there is no empowerment evaluation.

6.3. Accountability

Empowerment evaluation has always been committed to producing outcomes. It is not simply an engaging process. Empowerment evaluators, funders, staff, and community members share a common commitment to producing results. The list of real-world outcomes associated with empowerment evaluations is both long and significant. A few, drawn from our new book, are listed below. They focus on helping:

- Peruvian women transform their craft activities into a successful and sustainable business (Sastre-Merino, Vidueira, Díaz-Puente, & Fernández-Moral, 2015).
- Communities of color bridging the digital divide (Fetterman, 2013a; Fetterman, 2015c).
- Teachers evaluating their effectiveness in the visible learning model for schooling (Clinton & Hattie, 2015).
- SAMHSA improving substance abuse prevention outcomes (Imm, Biewener, Oparah, & Dash, 2015).
- Minority staff and community members reducing tobacco consumption in their communities (Fetterman et al., 2015).
- Improving school social worker effectiveness (Haskell & Iachini, 2015).
- Improvement in drug prevention programs (Chinman, Acosta, Hunter, & Ebener, 2015).

(Also see: Stanford University's School of Medicine transforming its curriculum and preparing for a successful accreditation review (Fetterman, Deitz, & Gesundheit, 2010) and NASA/Jet Propulsion Laboratory educating youth about the prototype Mars rover (Fetterman & Bowman, 2002)).

7. Truth in advertising: labeling correctly

Empowerment evaluation is influenced by the readiness of the organization to engage the approach. Environmental and organizational variables that also shape an empowerment evaluation include: pre-existing capacity, level of receptivity, commitment, resources, and perceived need. These variables help to produce high, medium, and low levels of empowerment evaluation, as noted earlier. In addition, there is a “spectrum” or continuum of empowerment evaluation. The practice of empowerment evaluation, within this spectrum, is influenced by the type of empowerment evaluation

desired. For example, there are two major streams of empowerment evaluation: practical and transformative (Fetterman, 1996, pp. 15–18; Fetterman, 2001, pp. 78; Cousins, 2005, p. 188–189; Fetterman & Wandersman, 2005, p. 19–20; Fetterman, 2015a, p. 8; Fetterman & Wandersman, 2007; and Suarez-Balcazar, Taylor-Ritzler, & Morales-Curtin, 2015, pp. 234, 251–254). They both rely on the same principles. However, practical empowerment evaluation may emphasize: improvement and evidence-based strategies. Transformative empowerment evaluations may highlight: democratic participation, social justice, and community knowledge. We add to this discussion that evaluators may apply empowerment evaluation concepts and techniques without having to facilitate a full-blown empowerment evaluation. They simply should label it accordingly.

8. Using empowerment theory to evaluate empowerment evaluation

“There is nothing as practical as a good theory” (Lewin, 1946). Empowerment theory provides a conceptual roadmap, helping people navigate through the social terrain in an evaluation. “Central to the empowerment concept is the importance of individuals and communities having influence and control over decisions that affect them (Israel et al., 1994, p. 3). Zimmerman (2000, p. 44–45) distinguishes between empowerment processes and outcomes.

Empowerment theory provides a framework in which to categorize empowerment evaluation’s contributions to empowerment. It is also instrumental in assessing the effectiveness of a given empowerment evaluation. Patton’s focus on principles to the exclusion of empowerment theories blinds him to the relevant and substantial empowerment processes and outcomes associated with empowerment evaluation.

Empowerment evaluation is committed to specific processes, including having people conduct their own evaluations. However, the bottom line in empowerment evaluation is results. According to Zimmerman (2000, p. 44–45):

Empowerment outcomes refer to operationalization of empowerment so we can study the consequences of citizen attempts to gain greater control in their community or the effects of interventions designed to empower participants. Empowerment outcomes also differ across levels of analysis.

Using empowerment theory to guide our work and assess success, instead of an arbitrary determination or definition of empowerment, helps identify and document the multiple levels of empowerment resulting from empowerment evaluations.

Focusing on processes, empowerment evaluation routinely, and by definition, helps individuals “develop skills so they can become independent problem solvers and decision makers” (Zimmerman, 2000, pp. 44–45). At minimum, empowerment evaluation enables people to empower themselves to conduct their own evaluations.

Concerning outcomes, several examples drawn from the chapters of our 2nd edition (Fetterman et al., 2015) are used to demonstrate how effective the empowerment evaluation approach has been in helping people accomplish their goals (as informed by empowerment theory):

8.1. Individuals

“Outcomes might include situation-specific perceived control, skills, and proactive behaviors” (Zimmerman, 2000, p. 44–45).

- All of the chapters – skills to conduct an evaluation.

- Chapter 5 – women acquiring skills to improve the quality of crafts and make them marketable for an international market (Sastre-Merino et al., 2015).
- Chapter 6 – individual teachers, school leaders, and groups of educators using evaluation to determine the impact of their work (the visible learning model) (Clinton & Hattie, 2015).
- Chapter 7 – individual community members acquiring computer and business skills to operate small businesses (Fetterman, 2015c).
- Chapter 11 – fourth and fifth graders learning research skills, including conducting focus groups (Langhout & Fernández, 2015).
- Chapter 12 – individuals learning evaluation skills (Suarez-Balcazar et al., 2015).
- Chapter 14 – individuals learning how to monitor their own progress in tobacco prevention activities (using an evaluation dashboard) (Fetterman et al., 2015).

8.2. Organizations

“Outcomes might include organizational networks, effective resource acquisition, and policy leverage” (Zimmerman, 2000, p. 44–45).

- Chapter 5 – women building a regional network of craft persons and securing business training to organize their labor force effectively (Sastre-Merino et al., 2015).
- Chapter 6 – educators creating professional learning communities to foster collaboration and continuous learning in visible learning schools (Clinton & Hattie, 2015).
- Chapter 7 – indigenous groups (Native Americans) acquiring tools and resources to establish a digital printing press (Fetterman, 2015c).
- Chapter 11 – fourth and fifth graders successfully negotiating with school administration to implement their projects to enhance the school culture (Langhout & Fernández, 2015).
- Chapter 12 – staff members producing evaluation reports and shaping organizational direction (Suarez-Balcazar et al., 2015).
- Chapter 14 – minority staff and community members influencing state and local policy concerning tobacco prevention (Fetterman et al., 2015).

8.3. Communities

“Outcomes might include evidence of pluralism, the existence of organizational coalitions, and accessible community resources” (Zimmerman, 2000, p. 44–45).

- Chapter 5 – women providing training for all women crafts persons throughout the region, including those outside the project (Sastre-Merino et al., 2015).
- Chapter 6 – educators building educational teams to create a common conception of progress, as well as measures and reinforcing activities (Clinton & Hattie, 2015).
- Chapter 7 – indigenous groups (Native Americans) building one of the largest wireless systems in the US, across tribal lines (Fetterman, 2015a,b,c).
- Chapter 11 – fourth and fifth graders accessing information and resources needed to make a mural reflecting the school culture and values (Langhout & Fernández, 2015).
- Chapter 12 – staff members and program participants mainstreaming self-assessment throughout the community-based organization (Suarez-Balcazar et al., 2015).
- Chapter 14 – minority staff and community members pooling data across non-profits to demonstrate effectiveness in reducing

tobacco consumption and saving the State millions in excess medical costs (Fetterman et al., 2015).

Empowerment evaluation outcomes, which have been extensively documented in this collection and many others, are by their nature, proxies for empowerment.

9. Critical friend

A critical friend is a trained evaluator who believes in the program in concept but asks the critical and often difficult questions that only a genuine friend would ask. They serve as a coach, facilitating an honest, open, and constructive discourse. They are vested in the success of the program and are more critical of it because they want the program or initiative to work (or at least have the best chance of making it work and producing desired outcomes).

Patton found a description of this role more implicit than explicit. We have discussed this role in some detail in the 1st and 2nd edition of this book, as well as in related publications, including a Centers for Disease Control and Prevention sponsored guide on hiring an empowerment evaluator (Cox, Keener, Woodard, & Wandersman, 2009). Therefore, we will simply make reference to these publications below:

Empowerment evaluation: yesterday, today, and tomorrow (Fetterman & Wandersman, 2007, pp. 182).

Empowerment evaluation at the Stanford University School of Medicine: using a critical friend to improve the clerkship experience (Fetterman, 2009).

Empowerment evaluation: a collaborative approach to evaluating and transforming a medical school curriculum (Fetterman et al., 2010, pp. 813–820).

Empowerment evaluation in the digital villages: Hewlett-Packard's \$15million race toward social justice (Fetterman, 2013a).

Empowerment evaluation: learning to think like an evaluator (Fetterman, 2013b, p. 306–307).

Collaborative, participatory, and empowerment evaluation: building a stronger conceptual foundation for stakeholder involvement approaches to evaluation (a response to Cousins, Whitmore, and Shulha, 2013), (Fetterman, Rodriguez-Campos, Wandersman, & O'Sullivan, 2014).

Empowerment Evaluation and community psychology: an alignment of values and principles to improve the human condition (Fetterman, 2015b, p. 335–340).

The role of the critical friend can be made more explicit by reviewing the 3-step (Fetterman, 2015a, pp. 30–34, 115–119) and 10-step (Wandersman, 2015, pp. 35–37, 150–164) approaches commonly used in empowerment evaluation.

10. Tools

Patton asserts that there are “no unique EE tools” (Patton, 2015, x). We agree that there is no need to reinvent the wheel. There are many evaluation tools that can be used in an empowerment evaluation.

We also agree with Patton that: “It is the EE facilitation and process that makes the tools EE tools” (Patton, 2015: x). This is a “strength”. “It reinforces that EE is fundamentally about systematic, empirically oriented, rigorously facilitated evaluative thinking” (Patton, 2015, x). It is not focused on any particular collection of tools used to conduct an empowerment evaluation. However, some tools are more user-friendly, culturally sensitive, and already adapted for empowerment evaluation use. Thus, they are more likely to be used in an empowerment evaluation, including the GTO approach (Wandersman, 2015). [See Fetterman et al., 2015 for a list of useful tools including: a caseload evaluation tracking system

(Haskell & Iachini, 2015); evaluation capacity assessment instrument (Suarez-Balcazar et al., 2015), quality implementation tool (Lamont, Wright, & Wandersman, 2015), and the empowerment evaluation dashboard (Fetterman, 2015a,b,c).]

11. People empower themselves

Patton rescued this gem from the obscurity of our appendix. It speaks to the heart of empowerment evaluation. It brings us full circle in our response to his review. We began by explaining how people are in charge of their evaluation in an empowerment evaluation. It is appropriate to conclude with this reminder. We made the principles explicit because we found too many empowerment evaluations were in name only (see Miller & Campbell, 2006; Fetterman & Wandersman, 2007). Similarly, we think it is appropriate to remind colleagues that empowerment evaluation places control in hands of staff and community members.

This simple but fundamental feature is what most clearly defines empowerment. For some, this may be cryptic, embarrassing, PC, or even pabulum. For us it succinctly captures the essence of self-determination versus dependency, empowerment versus disempowerment. We agree with Christens, Peterson, and Speer (2014) that “Empowerment evaluation is embedded in authentic and meaningful engagement processes, interpersonal relationships, diverse perspectives, and socio-political, cultural, institutional, and economic arrangements”. However, it is nothing if it does not cultivate an environment conducive to helping people empower themselves.

12. Future studies

We appreciate the suggestion to discuss the steps leading to an empowerment evaluation. Many will be the same as any evaluator first entering any evaluation. However, we suspect some will be different. Based on our experience, this stage is similar to regular evaluation but varies widely depending on circumstance and need. For example, in one case Drs. Wandersman, Dugan, and I were invited to present the highlights of empowerment evaluation to a community and then wait in the hallway for their decision to adopt the approach or not. Some funders have mandated it as part of their funding package (pending local approval). However, “how to facilitate this entry-level decision making” has not been studied systematically and merits our attention.

13. Conclusion

We appreciate Patton's placement of empowerment evaluation in the “pantheon of major approaches” (2015, p. x). We also appreciate his invitation to continue this engaging and productive dialog. It is our hope that this response illuminates and contributes to the evolving dialog about the science and practice of empowerment evaluation.

Thanks are extended to each of the contributing authors of our new book for their comments concerning this response. Special thanks are extended to John Hattie, Yolanda Suarez-Balcazar, Regina Day Langhout, and Dr. Wandersman's current students for their insights and contributions.

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