The Oral History of Evaluation: An Interview with Lyn Shulha

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Abstract: *Lyn Shulha is a Canadian evaluator whose scholarship in evaluation use, collaboration in evaluation, and evaluation standards development has shaped evaluation theory and practice in Canada and abroad. This article presents the transcript to an interview conducted with Dr. Shulha conducted in the tradition of oral history studies. Dr. Shulha identifies formative experiences in her development as an evaluator that shaped the trajectory of her thinking on evaluation theory and practice.*

Keywords: *Canadian evaluators, collaborative approaches to evaluation, evaluation use, oral history, research on evaluation*

Résumé : *Lyn Shulha est une évaluatrice canadienne dont l'expertise sur l'utilisation, la collaboration et les normes de pratique en évaluation a eu un effet important sur la théorie et la pratique de l'évaluation au Canada et à l'étranger. L'article présente la transcription d'une entrevue menée avec Mme Shulha, à la manière des études en histoire orale. Mme Shulha relève des expériences structurantes dans son développement comme évaluatrice, qui ont influencé sa pensée sur la théorie et la pratique de l'évaluation.*

Mots de clés : *évaluateurs canadiens et évaluatrices canadiennes, approches de collaboration en évaluation, utilisation de l'évaluation, histoire orale, recherche sur l'évaluation*

Lyn Shulha, PhD (University of Virginia), is a Canadian evaluator whose scholarship in evaluation use, collaboration in evaluation, and evaluation standards development have shaped evaluation theory and practice here in Canada and abroad. Over a 25+ year career, she has nurtured and mentored many of our current generation's evaluation professionals and scholars in her former role as Professor of Assessment and Evaluation at the Faculty of Education, Queen's University.

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Her commitment to making evaluation useful has remained a central theme of her scholarship and practice. In 1997, Shulha published what many now regard as a seminal article on evaluation use with Brad Cousins. In the article, [Shulha and Cousins \(1997\)](#) performed a much-needed integration of the literature on evaluation use and observed the changing tides that had been shaping evaluation use in theory, research, and practice since 1986. Of importance from their discussion is recognition of the fluid complexity that underlies evaluation practice and its implication to promoting evaluation use. In 2003, her chapter in the first edition of the *Sage Handbook of Mixed Methods Research*, co-authored with Robert Wilson, highlighted the importance of attending to collaborative processes and conditions in collaborative research and evaluation. In 2011, Shulha co-led the revision of the *Program Evaluation Standards* with her colleagues Dan Yarbrough, Rodney Hopson, and Flora Caruthers, focusing her contribution, again, on integrating theory, research, and practice on evaluation use. The resulting work set the standard for the modern practice of evaluation, offering to the field both considerations and a set of standards of practice. Most recently, she collaborated with her long-time colleagues, Brad Cousins and Elizabeth Whitmore ([Cousins, Shulha, Whitmore, Al Hudib, & Gilbert, 2016](#)), to articulate a set of empirically derived principles to collaborative approaches to evaluation.

In the edited transcript of the interview that follows, Shulha identifies those formative experiences in her development as an evaluator that shaped the trajectory of her thinking on evaluation theory and practice. She reflects on the mutually informing relationship between evaluation theory and practice, and on her multiple, intersecting identities as a classroom teacher, a teacher educator, and an evaluator. She highlights for us the importance of collaboration processes when facilitating evaluation use, the role of reflexivity when conducting evaluation, and, more fundamentally, the educative dimension to evaluation.

My name is Chi Yan Lam. Over the past seven years, I had the privilege of learning from and working alongside Dr. Shulha as my Master's and doctoral supervisor. I am honoured that Dr. Shulha accepted my invitation to be interviewed. Motivating my interest in conducting this oral history study is my curiosity to understand what drives her practice at a deep level. At times I have gotten glimpses of it. It would be in times of contemplation—such as after a client meeting, in between lectures, and in one-on-one meetings, typically late into the afternoon—that we would unpack our shared experience. She would typically lead with a question like “So, what did you think?” Or she might start with an observation: “Isn't it interesting that. . .” And over the course of an hour or two—she was always generous with her time—we would examine a situation and, out of that exchange, come to a clearer sense about what had happened, and in turn what to do next. This present oral history study is therefore my humble attempt to understand her career and body of work in a more systematic, rigorous fashion. I share this transcript in hopes that it might inspire others' thinking around evaluation theory and practice as it did for me.

The following interview was conducted on March 23, 2016 in her office at the Faculty of Education in Kingston, Ontario. This interview was conducted in

keeping with oral history traditions (e.g., [Leavy, 2011](#); [Oral History Association, 2009](#); [Richie, 2015](#)) and in the conventions established by the Oral History of Evaluation Project (e.g., [The Oral History Project Team, 2003](#)). This oral history research received ethics clearance from the General Research Ethics Board at Queen's University.

An Interview with Lyn Shulha

CHI: How have you come to learn about evaluation and the field?

LYN: It really started in 1985. I had enrolled in a MEd program at Queen's University primarily for advanced professional development. My last course was in program evaluation. It was set up as a series of simulations where we worked in teams. For one project we were the evaluation team and for another we were the program stakeholders. At the same time we were examining the writings of early builders: Marv Alkin, Lee Cronbach, Michael Scriven, Bob Stake, Dan Stufflebeam, and Joe Wholey. For our final assignment we had to identify a potential program, purpose, and context for an evaluation and then make a case for a particular approach.

The simulation helped me to realize how easy it was to make assumptions about the quality of information stakeholders were willing to give out. That was an important formative experience because I realized we were only able to consider the best way to answer the proposed evaluation questions after we had learned the stakeholder's true intent and purpose for contracting the evaluation, their investment in the program, and their assumptions about the evaluation.

For me, this kind of effort was a natural extension of my previous work in teaching soft skills to young people in school and camping leadership development programs. These are basically communication skills, like active listening, attention to nonverbal cues, clarifying and reframing ideas, and delaying judgments about meaning. As a teacher, I needed to be able to model these skills and also create learning situations where participants could practice how to give feedback, resolve conflict, and lead discussions that could result in decision making and problem solving. So I felt right at home in the simulation! Deliberations about selecting and applying models of evaluation were more perplexing for me but really thought-provoking.

CHI: How do you think being an educator has shaped your worldview as an evaluator?

LYN: Even as a certified teacher, it took me a while to grow into being an educator. Early on I worked very hard at designing and implementing instructional activities that I thought would motivate students to achieve the curriculum expectations. But as I became comfortable with both the curriculum and what I was hoping to accomplish with the activities, I was able to focus more on what was happening to my students and how they were thinking and feeling in the context of my classroom or leadership group.

Now when I'm leading an evaluation, I'm often thinking like an educator. It is not only my responsibility to orchestrate the evaluation, but also to observe the consequences of my decisions on my stakeholders and monitor what and how they are learning. If my stakeholders are not responding well, then my approach needs to change. Whether I am in the classroom or in an evaluation context, I want those I am working with to come away with a strong sense that they have accomplished important learning. It is also critical that they attribute their learning to the evaluation processes and not to me.

CHI: Do you identify yourself as an evaluator? At what point in your career did you start to identify yourself as an evaluator?

LYN: The whole notion of professional identity is interesting to me. I have not met one person who wanted to be an evaluator when they grew up! I *have* worked with a number of researchers who became "reluctant evaluators." I came to evaluation with a strong "educator" identity. I had to discover whether there was a "fit" between how I saw myself as a professional and what the potential was for this new identity. I also became aware, early on, that if you are working in a university context there are two dimensions to the evaluator identity. You need to be an effective practitioner and contribute to evaluation thinking.

I loved the practice; the pitfall of evaluation practice is that it can be more interesting to go onto the next project than to reflect on what you've experienced in light of the current discourse in the field. If you want to be an evaluation scholar, however, the latter is critical. What I really needed early in my career was a working knowledge of the different approaches to inquiry and how they worked with the theories and models of evaluation. This is where my formal education with Bob Covert, a past president of the American Evaluation Association, and Mike Caldwell, one of the authors of the first edition of the *Program Evaluation Standards*, was really valuable. These two created an incredibly rich learning context for those of us who were their doctoral students at the University of Virginia. They encouraged us to read, experiment, debate, and formalize our understandings of evaluation through hands-on projects and with each other.

I recall us extending the famous 1988 Weiss-Patton Debate (see [Smith & Chircop, 1989](#)). This debate can still be accessed online through the journal's website, *Evaluation Practice*. We argued with each other about whether it was reasonable, or under what conditions was it possible, for an evaluator to expect stakeholders to use our evaluation findings. I was drawn to Patton's utilization-focused vision because it aligned well with my own pragmatic orientation to helping people solve problems. In addition, through the ideas of Ernie House, Jennifer Greene, Karen Kirkhart, and Donna Mertens, I began seeing how the practice of evaluation could contribute, often implicitly, to a social justice agenda. This was an orientation that fit well with my values.

Just as I was considering my dissertation, Brad Cousins was introducing the research that he and Lorna Earl had done to create *The Case for Participatory*

Evaluation (Cousins & Earl, 1992). I had just experienced a project where the evaluation had become a divisive issue for the school. The ideas of Hallie Preskill, Rosalie Torres, Jean King, Sandra Mathison, and John Owen helped me to see how my evaluation work had been an actual intervention into their organizational processes. The new work of Cousins and Earl offered an empirical argument for the kind of collaborative approach that had helped me salvage that evaluation. I decided to conduct my own PhD research on the process of inviting stakeholders as collaborators. By the time I had graduated, I would say I had embraced the identity of an evaluation practitioner, but I still felt I was a long way from being an evaluation scholar.

It wasn't until about four years and several projects later that I became confident that I had some ideas to contribute to the field. When the 1997 Shulha and Cousins article was so well received by the field, I felt that I could add "evaluator scholar" to my professional identity.

CHI: In 1997, you and Prof. Brad Cousins wrote what would now be a seminal article on evaluation use. Can you tell us the backstory of it? What motivated you to write the article?

LYN: By the time this article appeared in the *American Journal of Evaluation*, Brad had been publishing for at least a decade. Writing the article seemed to be the ideal way for me to really test out whether I had been able to integrate what I had been learning about evaluation use. In accepting Brad's invitation to work with him on the project, I made a larger commitment to myself to learn how to write well enough to participate in the discussions the field was having around evaluation use and the implications of collaborative approaches to practice.

I can remember countless late nights—actually early mornings—struggling to see how all the references we had unearthed around evaluation use actually fit together. I presented the summary chart of the empirical data we had put together for the article at the AEA annual meeting in 1996. It was arguably the worst presentation I have ever done, because while I knew what I had read (and I summarized that process), I still hadn't internalized the significance of what it all meant.

Fortunately, the feedback that Brad gave me all the way through the writing process led me to making connections, not only among these different sources, but also between the literature and our experiences. The more connections I made, the more patterns seemed to appear and the easier it was to understand their significance for evaluation use.

CHI: Collaboration in evaluation continues to be a cornerstone of your body of work. Can you share with us why collaboration in evaluation matters to you? What do you see in it?

LYN: As clichéd as this may sound, I have always found that working collaboratively brings out the best in my thinking. Don't get me wrong, it's not "All

collaborative, all the time!” But working with the ideas of others in the midst of a deliberation or a conflict seems to sharpen my own internal dialogue. Collaborative discourse helps me to weigh the importance of my own ideas and reason more clearly. It has helped me over the years to hold my understandings “lightly” until I can make sure they have undergone sufficient scrutiny.

This gets to why I ended up using collaborative approaches in evaluation almost exclusively. It is in interaction with my clients and stakeholders that I was able to make my best decisions about evaluation processes and the meaning of evaluation data. But you can’t just *make* your evaluation team or stakeholders work collaboratively with you. It has to begin with the invitation to collaborate—realizing that every stakeholder has the authority to determine his or her degree of participation. If working collaboratively isn’t adding value to the process either for my stakeholders or for me, then the collaboration is just symbolic and the evaluation becomes time-consuming, inefficient, and frustrating. As an evaluator I always felt it was my responsibility to orchestrate the invitation and monitor the quality of our joint efforts. So, there’s the educator coming out in me again!

One of the reasons why I am so excited about the *Introducing Evidence-Based Principles to Guide Collaborative Approaches to Evaluation* that Brad Cousins, Bessa Whitmore, Nathalie Gilbert, Hind al Hudib, and I now have in press is that, as a set, they provide a holistic picture of this kind of work. While there is no evidence that any one principle can carry the day, it became clear from our data that *fostering meaningful relationships* was an early critical consideration not to be ignored!

The *Guiding Principles* (American Evaluation Association, 2004), *The Program Evaluation Standards 3rd Edition* (Yarbrough, Shulha, Hopson, & Caruthers, 2011), and the *CES Competencies for Canadian Evaluation Practice* (Canadian Evaluation Society, 2010) that have been established by our field continue to remind me not only of the practical but the ethical challenges around conducting evaluation. These challenges, I would argue, are magnified when we are working in collaborative relationships because of the consequences our work can have on people’s self-image, dignity, and their integrity within their organizations.

One strategy that I use in working to establish relationships with my collaborators is to have them articulate something that they really want to learn about—something that is connected to or has implications for the way they do their own work. This not only helps them to own aspects of the inquiry but it helps me see how I can best integrate their thinking and efforts into the evaluation process. In the end, it is important that the uses that result from the evaluation, however these are defined, are attributable to our collective thinking and not simply to the quality of the design or the data that supported our work.

CHI: In our time together, you’ve continued to impress upon me the importance of sustaining contribution to an area of scholarship and the importance of engaging in dialogue and conversation with the field. What other advice do you have for beginning evaluators and academics wanting to make a strong contribution to the field of evaluation?

LYN: When I asked Mike Caldwell if he had any advice for me as someone looking for an academic position in evaluation, he said only one word: "Publish!" Writing was difficult for me, as many of my early collaborators will tell you! But I did two things. The first was to be resilient enough during my frustratingly slow learning process to get the things I thought were important to say down on paper. To do this I had to let go of the notion that I was going to get it perfectly written the first time around. I kept hearing the old saying, "Don't get it right, get it written!" I learned a great deal about writing through the comments of my reviewers who gave me lots of worthwhile feedback. My second strategy was to be a regular reviewer on journal editorial boards. The more I read of other evaluators' submissions, the more I understood what made engaging and informative academic writing.

The real benefit of practicing evaluation in a university context is that I didn't have to rely on project work for my income. I learned, when an evaluation opportunity came across my desk, to ask a couple of critical questions: "Is there something about this project that can make a contribution to the development of my students?" and "Is there something about this project that can help me to continue exploring an issue, a method, or an aspect of evaluation theory?" If I couldn't answer yes to at least one of these questions, I rarely took on the project.

CHI: Before we continue on to talk more about evaluation, I want to take a diversion and talk about the other facet of your career, and that is your role as a teacher educator. You've been principally responsible for teaching classroom assessment to teacher candidates at the Faculty of Education. How do you think about these two facets to your professorship?

LYN: This is actually a fascinating question for me. When I first arrived at Queen's I had both assessment and evaluation responsibilities. For years I felt like I was working in two different fields. Over the years it became clearer to me that there was a significant relationship between these two responsibilities that needed to be explored. My colleague in classroom assessment, Don Klinger, and I are writing about this for an edition of *New Directions in Evaluation* as we speak. In short, in both classroom and program contexts those involved in either assessment or evaluation are required to collect information (data), make judgements about the meaning of that information, and then engage in decision-making based on these new insights. There are quality criteria that can be attached to each of these actions that apply equally well to assessment and evaluation. Realizing these connections has helped me to integrate my thinking and practice.

Being a teacher educator also showed me that creating a space for student learning was much more important than demonstrating to novices that I was a "master teacher." Early in my career at Queen's, I was teaching an undergraduate course when, near the end of one class, a student made a tentative case that there might be a better way to proceed than the one I was advocating. I was able to construct a quick, reasoned, and passionate argument for my position that was

informed by my own practice. As a result, I effectively squelched the discussion and kept everyone focused on the direction I wanted the class to go.

But that incident troubled me. The more I thought about it the more I could see the value in the case she had tried to make. I remember having to admit to myself, “My greatest strength can also be my greatest weakness.” What I now build into my evaluation practice is the opportunity for clients and stakeholders to explore what meaning the evaluation is having for them. Being responsive to the ways in which they are thinking about and experiencing our joint effort is a more productive way for me to establish and maintain my credibility than looking for opportunities to demonstrate my research/evaluation expertise.

CHI: Let’s return to evaluation. Michael Patton invited the evaluation community to talk openly about our failures in evaluation during AEA15. In that spirit, would you be willing to share with us a “failure” you may have experienced in your time evaluating programs, and what it might have taught you?

LYN: In a recent discussion with colleagues I argued against calling any evaluation a failure if you learned from it. But there is no doubt that early in my career I conducted evaluations that were less successful than I had planned them to be. You can read about one in the 1995 book, *Participatory Evaluation in Education: Studies in Evaluation Use and Organizational Learning* (Cousins & Earl, 1995). Let’s just say the insights were unintended ones! I guess the fact that I had such a searing need to write about this experience supports Patton’s notion that some of the most powerful learning comes when you enact an evaluation as skillfully as you possibly can and it results in some degree of disaster!

In this example I describe how I worked to be “utilization focused” in my approach. I engaged in what Michael Huberman (1999) called “sustained interactivity.” I established an elaborate communication network across all the stakeholders. And still, all of the effort, care, and determination to conduct a quality evaluation resulted in the findings being ignored and my teacher stakeholders feeling that I had wasted their time. Now, if you do a class or a workshop in evaluation with me, one of the first things you’ll hear me declare is a consequence of that painful learning: “Evaluation is nothing, if it is not political!” Maybe Carol Weiss was right? Essentially I learned that, without a deep understanding of how power and authority get distributed in the context where you are working, you can find yourself working toward understandings that will be irrelevant to how decision making progresses.

CHI: Whose career and scholarship have inspired you the most? Why?

LYN: I have already mentioned a number of evaluation scholars whose work I studied and admired. In terms of personal interactions, two people stand out. Robert Wilson is a cofounder of the Assessment and Evaluation Group at

Queen's University. He was the instructor of my first evaluation course, a member of my PhD committee, and he continued to mentor me through my early career. Bob modelled for me what it means to play with ideas as a way to think logically and deeply about a phenomenon or a dilemma. Throughout my entire career he has never told me what I should think—although we continue to have some intense debates around what is worth thinking about! What I took from Bob into my evaluation work was an understanding of the power of questioning. I have seen how asking clarifying or divergent questions at the right time can stimulate thinking and help individuals or groups “see” their own reasoning processes. It's a strategy that can also help stakeholders make the implicit understandings they carry about their program or organization, explicit. Using questions to “worry” a problem or an issue with stakeholders has become a way for me to fuel collaborative learning.

Another way to answer this question, though, is to look through my publications. When you do, it is clear that Brad Cousins has been my closest colleague in evaluation over the longest period of time. We have known each other since he was a doctoral student at the Ontario Institute for Studies in Education and I was a Master's student at Queen's. I have always admired his thinking about evaluation and the way he invites his colleagues and students to think with him. I have been very fortunate to conduct research on evaluation with Brad. We have written and presented together, and initiated our students into evaluation through sustaining the Kelly Conference—a conference hosted by evaluation students in Ontario and New York State. In terms of impact on the advancement of evaluation theory—especially around use—I would say that Brad has been certainly one of, if not *the* most influential Canadian in the field over the last 25 years. Having identified influence of these two people, I want to emphasize that my own contributions to evaluation theory and practice are grounded in what I have learned working with my colleagues, graduate students, and evaluation clients over the years.

CHI: What has been the biggest shift in the practice of the evaluation in your view?

LYN: I would say the emergence of context sensitivity and cultural competence as an expectation in evaluator practice. Evaluators are now asked to develop a strong appreciation for the contextual and cultural influences that are shaping individual participation and to take these into account as they orchestrate all aspects of the evaluation. The challenge for me is always to acknowledge that I approach evaluation practice with a particular set of meaning-making lenses. These lenses have been created from the contexts I have worked in and from the ethnic and organizational cultures I have experienced. Remembering that my perspective is a function of my experiences helps me to respect the fact that my stakeholders also carry experiences and have a vision of both the program and evaluation that is worth understanding.

CHI: In your view, how might the landscape of evaluation shift in the coming decades?

LYN: What I am seeing is a real openness to the limitations of linear rational models of understanding. Here I have been influenced a great deal by the work of evaluators like Glenda Eoyang, Kate McKegg, Michael Patton, and Bob Williams, as well as three Canadian educators, Rebecca Luce-Kapler, Dennis Sumara, and Brent Davis. These folks are part of a larger community looking at complexity theory and its implications for the systems that support social programs.

I did a presentation at a CES event in Charlottetown a couple of years ago on *The Emerging Influence of Complexity Theory on Evaluation Practice*. At that time the delegates and I discussed all the emergent influences that can dissipate the logic that gets recorded when creating a program logic model: staff turnover, policy changes, changes to funding or resources, new leadership or management, value conflicts, changing skill sets of program personnel, and the appearance of competitive programs, to name a few. We talked about how we might approach stakeholders if we viewed their professional capacities as co-evolving as they worked together. We wondered aloud about the implications for evaluation if program personnel were to see their responsibility as adapting to emerging program conditions and the changing needs and capacities of program users, rather than striving for fidelity of implementation. At least in beginning to think this way we are asked to consider what we really mean by “best practices.”

I would argue that collaborative approaches provide the best mechanism to learn about and understand these dynamics. Working closely with stakeholders can help an evaluator monitor the influence that context and culture are having on the way new understandings are being formed and acted upon.

CHI: What are you most encouraged about?

LYN: I am excited about the interest and increasing participation in evaluation. A quick look at the now 55 topical interest groups of the American Evaluation Association shows me that evaluation is bringing to the table ideas from the fields of health, business, government, psychology, education, the arts, justice, human services, and design. We are being supported by those advancing understandings about youth, adult learners, vulnerable populations, feminism, indigenous people, the LGBT community, and veterans. We are exploring the potential of more sophisticated qualitative, quantitative, and mixed methods designs. In addition we are recognizing the importance of social network analysis, knowledge translation, and the possibilities connected to the use of technology. A wide variety of professionals are being attracted to the theories, methods, and issues related to evaluation as a way to support their own professional practices and the practices of their organizations. This suggests to me an increasing diffusion of the use and influence of evaluation. Because we are attracting a diverse group of talented people willing to be informed by each other's work, I think it is an exciting time to join the field!

CHI: Thank you for sharing your thoughts with us.

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