PROGRAM EVALUATION SERIES

The Best Laid Schemes o' Mice an' Woman: Anatomy and Autopsy of an Evaluation Institute

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Note to Readers

This book was written for people who are interested in building and sustaining a collaborative evaluation institute within an institution of higher education. It is the story of one such institute that survived for 23 years before its demise, summarizing what happened and lessons learned from the experience.

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Editor

Professor Emerita Jean A. King has served as the Editor of the MESI e-book series since its inception. Throughout her career, before her retirement in 2019, she lived in two worlds: the world of evaluation scholarship, and the world of evaluation practice. She taught at the University of Minnesota for thirty years while maintaining a busy school- and community-based evaluation practice, actively engaging people in collaborative projects to bring evaluation to life. In her retirement she continues to connect to both of these worlds.

Introduction

I taught at the University of Minnesota for 30 years. For 23 of those (1996–2019), I served as Director of the Minnesota Evaluation Studies Institute (MESI)—pronounced "messy"—since, as many will agree, evaluation is messy. I created MESI with the unwavering belief that, over time, the process and outcomes of evaluation could improve social programs, including those at a large land-grant university like Minnesota's and those in surrounding communities. Throughout its history MESI was never well-funded, relying instead on three things: (a) the unrelenting energy of cohorts of exceptional Evaluation Studies graduate students, (b) the good will and support of my department and colleagues, and (c) me. Because MESI was always a shoe-string operation, we never found the time to formally document what we were doing; we just acted then moved on to the next looming priority. Now, post-retirement and thanks in part to two years of a pandemic, I have taken time to reflect on the nearly quarter century of MESI's activities and their implications for others seeking to establish and manage such an institute.

My intention in writing this e-book is to document the 23 years of "MESI-ness" and to consider lessons learned in hopes that other university-based evaluation educators can apply them in their institutions and avoid the pitfalls MESI encountered. This e-book's purpose, then, is twofold. First, following grounding in the literature on evaluator education, it will describe MESI and detail the history of this university-based institute devoted to community building and the practical training of evaluators, both within and outside the university, as it existed for 23 years (1996–2019).[1] Second, it will highlight and

1 MESI has been on hiatus for three years partly owing to my retirement in 2019 and partly because of the Covid-19 pandemic that continues to dramatically affect the functions of the

analyze what MESI did—perhaps uniquely—presenting in painful detail the challenges that routinely threatened (and finally ended) its existence and other issues related to its sustainability. I hope that if other evaluator educators understand the challenges we confronted that ultimately constrained our grand aspirations, they may be able to anticipate and address problems if they seek to create MESI-like structures at other institutions of higher education.

"Methods"

This e-book does not report a formal research study. Rather, it belongs to a genre common in the evaluation literature, the reflective narrative, which is often historical in nature and built on the reflections and analysis of a practitioner/scholar. The reflective narrative is an appropriate approach for examining MESI's 23 years as my intention is to describe its structure and activities grounded in my personal knowledge, then analyze these details to create an understanding that others may use. Lofland (1995) points to the advantages of "starting where you are," and that is what I have done. However, while the content that follows was based largely on my memories and impressions, it also relied on a variety of printed and electronic documents covering the years that MESI existed. These included the following:

- A total of 105 electronic files and 512 documents across the years (e.g., participant data from MESI events, Advisory Board minutes, notes from a community meeting, various PowerPoints used at trainings and presentations [e.g., King, 2012], notes from plenary speakers) plus four notebooks filled with MESI materials
- Three transcripts: a 2003 interview with Professor Wayne Welch from the Department of Educational Psychology, who founded the evaluation program in that department in the late 1960s; and two interviews conducted by an external interviewer in 2019, one with me and one with Melissa Chapman Haynes, the only full-time MESI staff member ever employed
- Four formal studies of MESI: Gensinger (2013), Subialka-Nowariak (2014), Pleasants (2014), and Bowman and Illes (2016)

University. It is unlikely that it will re-emerge.

Grounding MESI in the Evaluator Education Literature

Since the 1960s when the field of evaluation burgeoned in the USA, university-based evaluation education, encompassing the teaching of many future evaluators as well as future clients, users, and funders of evaluation, has been a free range operation. In the past, people seeking to learn about evaluation had three options: (a) they could pay to take coursework if the higher education institutions in their geographical area offered them, (b) they could travel to professional evaluation conferences if they could afford to, or (c) they could read the evaluation literature available to them. Now, with the emergence of on-line instruction and an ever increasing number of on-line certificate and degree programs, people seeking to learn about evaluation have multiple choices available, no longer with geographic constraints.

What remains constant, however, is the free range nature of offerings—the lack of standardized curricula, program accreditation, and credentialing or licensure requirements (King, 2018; Gullickson et al., 2019). Some "programs" offer a course or two, perhaps taught by someone who is not active in or even aware of the field, while others structure explicit years-long sequences of requirements (LaVelle, 2020). Across scholarship on the subject, the importance of field-based, hands-on experience in developing competent evaluation practitioners is one documented commitment that both university faculty and practicing evaluators have agreed upon (Trevisan, 2004; King & Ayoo, 2019; Bowman, 2020). There is, however, little consensus regarding how to best or even appropriately deliver such training.[2]

2 With sincere apologies to John Dewey, in this article I ignore the distinction between training and education and will use the terms interchangeably.

In addition, despite the field's existence for over 50 years, the literature on evaluation education to date remains fairly sparse (Gullickson et al., 2019; King & Ayoo, 2019). Three recent publications on the topic—an article (Gullickson et al., 2019) and special issues of *Evaluation and Program Planning* (Gullickson et al., 2022) and the *Canadian Journal of Program Evaluation* (LaVelle & Chouinard, 2020)—thankfully suggest that this may be changing. Until very recently, however, a sentence from Brown (1980) effectively summarized the outcome of the existing literature: "There is no answer to the question [of] what constitutes an adequate evaluation training program. . ." (p. 86). Further, as already noted, the literature

> . . . saw meaningful fieldwork as a critical part of evaluator education, although a variety of instructional approaches and experiences in and outside the classroom were both needed and available to teach the multiple competencies required of practicing evaluators. The literature to date did not define what exactly those were and how they might develop over the course of an educational program. (King & Ayoo, 2019, p. 10)

Although the literature is sparse, it is nevertheless important to ground MESI's structure in it to highlight what made MESI different. As is common in many universities, part of MESI's functioning was match-making, pairing University graduate students with local non-profit or governmental agencies for pro bono volunteering or, if available, for assistantships or stipends. While evaluator educators may agree on the importance of such activity, in my experience it is typically a challenging and underfunded part of evaluator education that overcommitted faculty may have little time to organize or monitor.

Such an emphasis on the value of direct practical experience was surely not unique to our university. University collaborations with community organizations often take one of two forms:

- An academic course (Bakken et al., 2015; Buitrago et al., 2015; Suiter, Thurber, & Sullivan, 2016)
- An innovative summer institute (Mignone et al., 2020)

MESI was built on the existing courses at the University of Minnesota, and, as often as possible, collaborative projects were integrated primarily into the regularly-offered internship class. We encouraged students placed in an organization for the purpose of conducting a MESI study to enroll in the internship course where they could discuss their experiences and learn from other students' projects. If they did not enroll in the class, they would meet regularly with me and/or with advanced doctoral students who provided supervision and mentoring. Although the notion of offering summer training was appealing, given our limited resources, MESI was able to offer Summer Institutes only three times (1996, 2012, and 2015).

Research universities often house another kind of structure that supports practical training for evaluation students: a largescale contract- or grant-driven center that solicits funded projects. Many universities have centers that compete for sizeable evaluation contracts (e.g., from the National Institute for Health, the National Science Foundation, or state agencies) and then hire graduate students to work on teams with other researchers or evaluators.

By contrast, the literature describes three such university programs that, like MESI, created structures similar to "consulting firms" to obtain typically small contracts (less than $50,000) to support students (King & Ayoo, 2019, p. 79). Over 30 years ago, Eastmond et al. (1989) reported supporting students to work on paid evaluation contracts with clients both on- and off-campus. They concluded that this approach led to five types of concerns (design, logistical, academic, ethical, and legal) and recommended against such a practice! Two other centers—Applied Research Consultants (ARC) at Southern Illinois University (McKillip, 1986; Nadler & Cundiff, 2009) and the Assessment and Evaluation Center (AEC) at Washington State University (Trevisan, 2002)—had structures similar to MESI. ARC, which has existed for several decades and continues to this day,

> . . . uses a vertical practicum structure whereby advanced students help to train newer students by conducting evaluations. Ten to 12 students participate in ARC projects and commit for two to three years of practical experience. (King & Ayoo, 2019, p. 8)

Reflecting a different experience, the AEC reportedly evolved to become part of another research center (the Learning Performance Research Center) where, given individual faculties' interests, its focus on evaluation lessened (Trevisan, personal communication, March 27, 2019).

If centers like ARC and AEC also existed, what made MESI different? As I will explain later in detail, MESI had four distinguishing features. First, it operated in Minnesota, home to a long-standing evaluator training program and well-known evaluation author and guru Michael Quinn Patton. Hence MESI had an evaluation-rich state context. Second, while similar in structure to ARC and AEC, at its height MESI served many more students a year. The third distinctive feature was MESI's structure. LaVelle and Galport (2020) distinguish between university-based evaluator education (single courses, degree and certificate programs) and structured professional development trainings for evaluators (e.g., The Evaluators' Institute, American Evaluation Association workshops). Because it included both structures, MESI was a hybrid of the two. Fourth, related to its trainings, a notable component of MESI was intentional community evaluation capacity building (ECB) (Compton et al., 2002; King & Volkov, 2005; King, 2007; Labin et al., 2012; Bourgeois & Cousins, 2013; Labin, 2014; Carden, 2017). Tracing MESI's development over time will illuminate these distinctions.

A History of the Minnesota Evaluation Studies Institute (1996–2019)

In 1995 I was charged with developing a graduate degree program in Evaluation Studies for my department at the University of Minnesota.[3] The simultaneous creation of an evaluation institute immediately came to mind. Our College was fortunate to have had quantitative evaluator education in the Department of Educational Psychology (EPsy) since the mid-1960s. Professor Wayne Welch, a member of the May 12 group of evaluation scholars,[4] instituted this coursework, and from then until the present, graduate students have been able to earn master's or PhD degrees in EPsy with an emphasis in quantitative methods and program evaluation. Robert Bruininks, our College's dean (who later became provost and president of the University), wanted to add a broader evaluation degree program, and Educational Policy and Administration (EdPA) was its logical home. After two years of task force deliberations, a committee of faculty from several departments in three colleges (Education and Human Development, Public Health, and Public Policy) planned the curriculum, and it fell to me to shepherd it through the Graduate School approval process. I became the Coordinator of the Evaluation Studies track in EdPA.

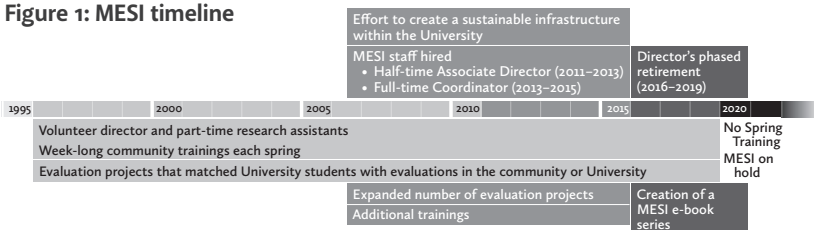
3 The department was then called Educational Policy and Administration (EdPA); it is now Organizational Leadership, Policy, and Development (OLPD).

4 A group of university scholars that included Jason Millman, Michael Scriven, Robert Stake, and Daniel Stufflebeam created the May 12 group in the late 1960s to discuss the development of the emerging field of evaluation.

By then my experience had taught me that truly learning how to conduct a program evaluation required far more than university-based coursework. To my mind, it was essential to have an ongoing and viable connection to the communities that Twin Cities evaluators served. This would surely benefit students, who needed to understand the practical workings of evaluation in the field. It could also benefit community members who worked in various organizations that hired evaluators and used evaluation results (government, non-profits, foundations, educational institutions, etc.), as well as those who wanted to learn more about evaluation, either personally or to build the capacity to do and use it in their organizations. While providing practical training for future evaluators, such connections could simultaneously strive to build a community to support evaluation. The Minnesota Evaluation Studies Institute was born.

MESI's history included three distinct phases (see Figure 1):

Figure 1: MESI timeline



- 1996–2011: From its inception until 2011, two activities were dominant: (a) planning and running a week-long community training each spring,[5] and (b) matching university students—both those who were simply taking evaluation courses and those seeking graduate degrees—to paid and unpaid evaluation projects through an informal process. People from the community or university would contact someone in our department (usually me) looking for a student to work on an evaluation, and we would connect that person with a likely candidate. While students worked on their projects, especially if they were new to the field, they were encouraged to take the internship class to insure adequate opportunities for reflection, group processing, coaching, and supervision.
- 2011–2015: For roughly four years I made a concerted effort to systematize MESI's functions, create a sustainable infrastructure, and hire full-time staff. I jokingly called this effort MESI-Redux, i.e., "MESI-er". The desire to expand was triggered when I attended a meeting of a dozen or so faculty from across the university, all of whom were engaged in program evaluation in some way. I had attended similar meetings

5 At some point in the late-1990s, I sought the sponsorship of the American Evaluation Association (AEA) for MESI trainings as did Midge Smith for those of The Evaluators' Institute (TEI). At that time the AEA Board chose not to endorse any outside professional development options.

to discuss ways to formalize a cross-university collaboration three previous times in the preceding decade, but nothing ever came from them. This fourth meeting motivated me to try to make MESI a central structure to support such collaboration within the university. In the end, following several years of sustained effort and a great deal of hard work, this effort failed. In August, 2015 Melissa Haynes, MESI's one full-time staff member, left the university to take another position, and I planned for three years of phased retirement (2016–2019).

- 2015–2019: With one difference, MESI reverted to its traditional activities, sponsoring an annual spring training and continuing our community initiative by informally connecting students and organizational staff to work on evaluation projects. In an effort to harness some of MESI's content, we added one activity that I could personally manage: the creation of a MESI e-book series in collaboration with the University of Minnesota Libraries (Chazdon et al., 2017; Hakkola et al., 2017; LaVelle, 2018). Five years later, in the spring of 2020, when the pandemic closed the normal functions of the university and made face-to-face trainings impossible, the remaining evaluation faculty put MESI on hold. Owing to issues related to the continuing pandemic and departmental politics, its re-emergence at this point seems unlikely.

Given its eventual failure to thrive, this analysis of MESI will discuss all 23 years, but focus primarily on its growth period, 2011 to 2015, when I made a concerted attempt to have MESI become self-sustaining.

Positionality

Recent developments in evaluation research point to the importance of detailing positionality in one's writings, and positionality is especially fundamental for this article since it relies heavily on my personal experience as MESI's director. This section presents what I see as the essential elements of my background and profile that likely affected MESI's development. For over 50 years I have been teaching in a variety of settings (classes, workshops, lectures, presentations, tutoring sessions, etc.). A Chasidic saying notes: "For the unlearned, old age is winter; for the learned, it is the season of the harvest." Such lengthy experience surely provides me a depth of specifics to harvest. So let me explicate how who I am likely affected both MESI and the description and analysis presented in this article.

1. My primary self-identity is that of teacher. My PhD is in curriculum and instruction, and I have had a lifelong commitment to high quality instruction that actively engages learners. I note with humility that over the years I received consistently high ratings and several awards for my teaching. Unavoidably, then, instructional excellence was a consistent goal for all things MESI, including meaningful interactions, challenges, and fun.

2. Second, and importantly, I am someone who genuinely likes and cares for people and thinks we should treat each other kindly. King Rule for Living #4 is "be nice" (Stevahn & King, 2010, p. 154), and across the years MESI tried to bring that rule to life. The culture of MESI embraced kindness, respect, and inclusion, breaking down various hierarchies common in a large university and in university/community relations. We did our best to model an ethics of care (Noddings, 1984) and remember Martin Buber's adage that "all actual life is encounter."
3. Third, given items 1 and 2, I learned that by whatever label (e.g., collaborative, interactive, inclusive), my approach to evaluation must be participatory because I value the people with whom I engage. High quality instruction, both in trainings and in evaluation projects, is not necessarily easy, but at best it engages people positively and creates a context in which they can learn from their experience.
4. Another key personal conviction relates to my fervent belief that people who work in communities have their own special wisdom. If I am not a member of that community, they will always know their context and what is happening in it far better than I ever can. This is one reason I prefer to build long-term evaluative relationships with organizations, to become over time a knowledgeable semi-insider rather than someone who parachutes in to conduct a study and then, with the contract finished, departs. Part of MESI's mission was helping students understand the importance of this fact while simultaneously, just maybe, helping people working in programs learn to appreciate evaluation and, perhaps, even build their evaluation capacity.

5. A final, highly relevant personality quirk is that I am willing to work either pro bono or for a low price on projects that are important to me. Thanks to my privileged position as a tenured university faculty member, I could engage in projects I cared about—including MESI—without worrying about being paid to do so. I recognize that for many people this is simply not an option. There were many projects over 23 years that I chose to work on even though the organization lacked sufficient funding. For me, it is better to do these projects than to hold out for money that is not and never will be there. While it may finally have had implications for the Institute's sustainability, I believe that this detail was also critical for its development.

Over 23 years these personal characteristics necessarily shaped MESI's culture and structure, and perhaps may have ultimately doomed it. I believe they are important considerations as others think about replicating a MESI-like institute in another setting.

What Exactly Was MESI (1996–2019)?

I have already detailed MESI's where, when, and, at least briefly, why. Allowing for overlap across components, the following section will describe MESI's who, what, and how.

Who Participated in MESI?

Throughout its existence, MESI had an exceedingly small staff. For 23 years I served as the volunteer director, never receiving a salary or course release for what to me was a labor of love. I must also note, however, that throughout MESI's history, I was a tenured professor. For 23 years, I was the only person with guaranteed job security in a university system that clearly values people with tenured status. Two non-tenured paid leadership positions existed for a total of five years: Laura Pejsa, a half-time Associate Director (2010–2012); and, assuming the same responsibilities full-time but with a different title, Melissa Chapman Haynes, who served as Coordinator (2012–2015).[6] I was able to support Pejsa's position using indirect cost recovery funds from a large grant I was part of. OLPD guaranteed support for Haynes' position for 2 years, after which there was an expectation—indeed, a requirement—that the position become self-supporting.

Both Pejsa and Haynes had PhDs, extensive experience as evaluators, and solid capability as instructors and mentors. They were also kind and valued MESI's approach. Pejsa left after 2 years because she was being paid half-time—including no additional pay for teaching the internship course—and working more than a full-time job; it was untenable. Haynes, unfortunately, had a

6 Owing to a scandal at the University's Medical School, around this time the University did a study of job titles across all units and limited the use of the term Associate Director.

similarly frustrating experience. Her position was only guaranteed for 2 years, and the importance of generating revenue proved daunting. In addition, as the full-time MESI Coordinator, she took on a number of non-MESI responsibilities related to the Evaluation Studies degree programs: (a) she served as the Director of Graduate Studies of the graduate Evaluation Certificate; (b) she taught the internship course every semester (i.e., three times a year); and (c) she sat on students' master's and doctoral degree committees as well as on the College's International Committee. MESI was not compensated for any of this work even though Haynes clearly saved the department money. It never occurred to me to ask the department for such compensation.

MESI offered students two possible roles. One group of students consisted of graduate students from across the University who sought training, instruction, or direct experience in program evaluation. The Institute routinely attracted students from the College of Education and Human Development, the Humphrey School of Public Policy, and the School of Public Health, several of whom went on to complete PhDs in Evaluation Studies. The other group was advanced doctoral students in Evaluation Studies who served as project leads and mentors to their peers on MESI-funded projects and each year helped to organize MESI trainings. Thankfully, for over a decade (roughly 2000 to 2013) the department paid for two quarter-time research assistantships that supported these advanced doctoral students, who—merely as a point of interest—were primarily female.

The final group of people actively participating in MESI were those faculty and community members who agreed to teach at MESI trainings. The annual Spring Training was not a conference; instead we recruited instructors known for their expertise and teaching skills, including university faculty and community-based evaluators. Four well-known Twin Cities colleagues in particular, each of them also known nationally at the American Evaluation Association (AEA), were MESI

mainstays: Mary Anne Casey and Richard Krueger, Michael Quinn Patton, and Vanessa McKendall Stephens.

In addition, MESI had a volunteer Advisory Board that included representatives of numerous groups: (1) students, many of whom continued to serve following graduation, (2) professors from several colleges and centers (e.g., the Center for Urban and Regional Affairs, the Humphrey School of Public Policy, the Institute on Community Integration, the School of Public Health, and the School of Social Work), and (3) community evaluators from local non-profits, government agencies, and foundations. The Advisory Board met at least twice a year, always with food and a social component, fostering connections across departments, centers, and organizations as it critiqued the previous year's sessions, helped to plan the next Spring Training, and reflected on MESI's organizational trajectory.

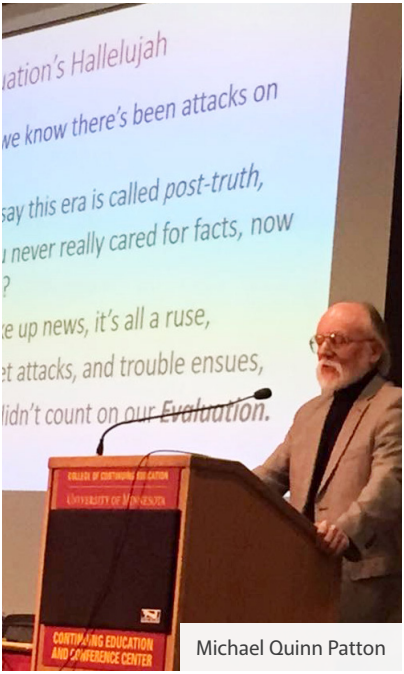
We also routinely collaborated with the local AEA affiliate, the Minnesota Evaluation Association (MNEA). Over the years many Evaluation Studies students served as student representatives on the Board, and many MESI participants (former students and trainers) eventually held leadership roles in MNEA, creating a natural and ongoing relationship.

What Exactly Did MESI Do?

As noted above, one of the Institute's defining distinctions was choosing not to compete for large evaluation or research contracts (except, on occasion, as part of someone else's proposal). Over its 23 years, MESI had three primary functions (King, 2012; Pleasants, 2014): (a) a training institute, (b) a low-cost evaluation consulting firm, and (c) a community-building evaluation resource center. In theory we also wanted to conduct research on the field of program evaluation, but those efforts never expanded beyond research that was integral to degree requirements or job-related expectations for faculty. The following sections describe these three functions.

Training Institute. One of MESI's stated goals was "to provide high quality training and professional development in program evaluation both within the University and in the community" (King, 2012). The Spring Training, which across the years reflected this commitment, was MESI's structure for formal training. For each of its 23 years, formal MESI trainings provided a short-term, targeted approach to learning about program evaluation, demonstrating the value of helping people—students, faculty, and community members alike—learn about the field and the nuts and bolts of conducting an evaluation. To my mind, everyone is an evaluator because people routinely make judgments about numerous things (King, in press). MESI trainings sought to enhance and systematize people's evaluation knowledge and skills, regardless of their entry level. This applied to students new to evaluation, to graduate students interested in upgrading their knowledge and skills, to practicing evaluators who attended, to

Training Institute



Michael Quinn Patton

Vanessa McKendall Stephens

Stafford Hood

Left to right: Stewart Donaldson, Vidhya Shanker, Olivia Jefferson, Ibrahim Noor, Jean King

Field trip participants at work

university faculty who did not even know the field existed, and to community members seeking to build their organization's evaluation capacity.

Highlighting my approach to evaluation (which became MESI's), a refrigerator magnet from 2015 stated, "We are an interdisciplinary training institute committed to supporting evaluation that values stakeholder participation and collaboration." Held at the time of year when baseball teams conduct their spring trainings, it provided a week of training sessions for university students, faculty, community evaluators, and funders of evaluation. Again, MESI's Spring Training was not a conference; people could not submit proposals to present papers. Instead, we designed it each year to be a substantive educational and networking experience.

Distinguishing characteristics. Three characteristics highlight what made MESI trainings distinctive: a sense of humor, purposeful community building, and the regular participation of nationally-known evaluation figures. First, humor permeated activities at MESI. We took our work, but not ourselves, seriously. An institute with a name like MESI—especially to anyone who knows me—suggests a culture that embraces both humility and silliness and, while treating interactions and topics professionally, does not take itself overly seriously. Each year participants submitted items for a Top Ten list, which always involved a simile comparing evaluation with something, e.g., a rainbow, gardening, the MN State Fair (See Figure 2 for an example). The results were presented as dramatically as I could make them at the Friday plenary session, with prizes given for the top three answers each year (sometimes evaluation books, other times theme-related gag items). In the early years we also provided party favors (e.g., t-shirts, flashlights, note pads).

Michael Quinn Patton, the only person to participate in every MESI Spring Training, routinely contributed to the fun, often by having the audience sing an evaluator's version of a well-known song whose words he had adapted. One year he paraded into the plenary wearing a feather boa, the signature accessory of Jesse Ventura, Minnesota's then governor. The two years that we held a training in the summer, people wrote limericks and created evaluation dioramas; one highly creative Extension educator even sewed an impressive evaluation cape. The idea at MESI was to make evaluation training fun and enjoyable, but never to trivialize the content.

Purposeful "high touch" community building was a second distinctive MESI attribute. Every day we offered breakfast, lunch, and morning and afternoon breaks so that people had an opportunity to connect over food. At the Wednesday morning plenary session, I would review the training's M&M's: its mission and modus operandi (see Table 1). We would then hold two plenary activities to begin to create community: (a) voicing variables (King & Stevahn, 2013, pp. 107–109), asking people to stand (as they were able) when a category applied to them (e.g., their current role, where they were living, their professional content

Figure 2: A Representative MESI Top Ten List (2002): Why Program Evaluation Thrives in the State of Minnesota

MESI Top Ten Reasons

Why Program Evaluation Thrives in the State of Minnesota

10. Like deer hunters, Minnesota evaluators know how to camouflage themselves in the field.
9. Many Minnesotans believe they are made in the image of G-d, the ultimate judge.
8. You betcha it thrives. Minnesotans have an intense need to know what they could be doing better.
7. Minnesota is the land of 10,000 non-profits and collaboratives.
6. L'étoile du Nord (the star of the North) is home to several evaluation "stars."
5. Minnesotans are too nice to say no when asked to participate in evaluations.
4. The extreme temperature range from sweltering heat to frigid cold insures that only the toughest studies survive.
3. Former Governor Ventura likes to wrestle with data and results.
2. In Minnesota you are never more than 315 miles away from Michael Quinn Patton.
1. This is due to an ongoing attempt to validate Garrison Keillor's claim that "all the women are strong, all the men are good looking, and all the children—and evaluators—are above average."

Table 1: M&M's: MESI's mission and modus operandi	
The M& M's	**Meaning. . .**
Mission	To provide a diverse group of evaluators useful information about the theory and practice of evaluation in a stimulating, supportive, and reflective environment
Modus operandi	• Ask questions • Think about how what you're learning will affect your practice • Network with other people • Keep your sense of humor • Reflect, reflect, reflect. . .

area); and (b) really small group conversations (two to three people sitting near each other, preferably including someone they did not know) about why they were attending and what they hoped to learn. Community building continued during the training sessions, which were always small (10–25 maximum) and purposefully interactive. During at least one Spring Training luncheon each year, we labeled tables with specific topics so that people interested in those topics could meet and chat. In the words of MESI's Coordinator, Spring Training

> . . . always felt like a space that belonged to everybody. Whether you've been around for a long time, you're brand new, or you've no idea what you're doing, but you somehow stumbled upon this. Everyone was welcome, and it was always like that was a family . . . People would come time and time again to see people that they knew and to continue to learn as well. (Melissa Chapman Haynes, personal communication, 2019)

The third distinctive feature of MESI's trainings was the inclusion not only of local celebrity instructors, but participation each year by nationally-known evaluation personalities who delivered MESI plenary keynotes and usually offered at least one workshop in addition (see Table 2). Mary Corcoran, a Professor Emerita in Educational Psychology, had given money to the College that we earmarked for many years to support the national scholars who participated in Spring Training. This fund supported these visitors' travel and honoraria. For several years early in MESI's development, the speakers also offered a seminar for advanced doctoral students.

The Spring Training themes built on the expertise of the plenary speakers. In 1997, for example, Michael Scriven spoke in the context of "Evaluation Today: The Great Issues and Great Problems," and in 2015 Donna Mertens (making her second visit to Spring Training) grounded her plenary in the theme of "Social Justice Amidst Standards and Accountability." In the final years of Spring Training (2016–2019), the program featured practitioners and scholars of color,

including national figures Stafford Hood and Sanjeev Sridharan and local experts Olivia Jefferson, Ibrahim Noor, and Vidhya Shanker.

Spring Training structure, venues, and content. Across the years, the Spring Training structure evolved as post-session feedback documented what reportedly worked well for attendees. In the final decade, the structure consisted of half-day or day-long pre-sessions on Monday and Tuesday followed on Wednesday through Friday by plenary presentations and shorter (2-hour) trainings. Because we knew Michael Patton's potential to draw an audience, he kindly served as the plenary keynote on Friday mornings. The venues varied. We started in a hotel near campus, then moved to more reasonably priced off-campus meeting facilities (near the airport, in downtown St. Paul, and on Summit Avenue in St. Paul). Eventually we chose to use the university's Conference and Continuing Education Center on the St. Paul campus. It was affordable, offered quality all-day food service, and nearby parking and hotels; the site received high ratings every year we held MESI there.

Because participants came with different levels of knowledge and skills, Spring Training featured two tracks: (a) introductory for people new to evaluation (students, accidental and novice evaluators, and community members, who were often staff of local non-profit organizations), and (b) "advanced" for practicing evaluators, funders, and managers. We worked hard annu-

Table 2: Evaluation Content Plenary Speakers at MESI Spring Trainings (1996–2019)*

Michael Quinn Patton	1996–2019
Robert Stake	1996
Michael Scriven	1997
David Fetterman	1998
Laurie Stevahn	1999
J. Bradley Cousins Carol Weiss	2000
Gary Henry Ernie House Vanessa McKendall Stevens	2001
James Altschuld	2002
Hallie Preskill	2003
Thomas Schwandt Daniel Stufflebeam	2004
Donna Mertens Michael Scriven	2005
Melvin Mark Karen Seashore	2006
Jennifer Greene Ross Conner	2008
Sandra Mathison Hazel Symonette	2009
Ricardo Millett	2010
Rodney Hopson	2011
Glenda Eoyang	2013
Jean King Donna Mertens	2015
Thomas Chapel Sanjeev Sridharan	2016
Stafford Hood	2017
Stewart Donaldson	2018
Nicole Bowman Leah Neubauer	2019

* There were three years when non-evaluators provided the Spring Training plenaries: Minnesota's Legislative Auditor James Noble (2007); the CEO of Minnesota's Courage Center and (at that time) former MN Commissioner of Health Jan Malcolm (2012); and the Co-Directors of the University of Minnesota's National Center for Interprofessional Practice and Education Barbara Brandt and Frank Cerra (2014).

ally to ensure that important contemporary topics (e.g., cultural concerns, accountability and randomized control trials, evaluator competencies) were included in the offerings, and, as previously noted, each year we invited a small group of carefully vetted instructors to teach. A special student rate covered only the cost of the venue and food, and members of the Minnesota Evaluation Association (MNEA), which sometimes provided financial support, paid discounted fees. Fees were waived for presenters and students who volunteered.

Options available. As it evolved, Spring Training also included three specific features: course credit, two (ultimately non-viable) special formats, and field trips.

- **Course credit.** The possibility of receiving course credit for attendance remained popular across the years. Every year we offered a one-credit pass/fail course option through which students who signed up attended and then prepared notes and a summary reflection on the content. For three years early on, I also offered a one-credit course on how to evaluate a conference; students who enrolled studied traditional and innovative methods for evaluating training sessions, then actually conducted and wrote up that year's evaluation.
- **Two special formats.** First, modeling after AEA's Annual Meeting, for two years we sponsored poster sessions so that numerous people would have an opportunity to present. These were held at the end of the day, one year with a cash bar and the second year with an ice cream social. We also kept the posters up the following day. But the format didn't work well for MESI—few people stayed after the afternoon session and, for those who created the posters, the amount of work required to create them didn't seem worthwhile. Second, building on the idea of the Kelly Evaluation Conference,[7] for three years Spring Training included presentations by University of Minnesota doctoral students. When it proved somewhat challenging to find an audience for these presentations—many paying customers took breaks while they were occurring—we also ended them.
- **Field trips.** Another option we offered three times (2015, 2017, 2019) was an evaluation field trip, complete with pre-preparation, buses, snacks, and post-reflection. The trips visited one of two types of organizations: (a) non-profits where MESI participants learned about the staff's evaluation challenges and brainstormed together how to resolve them, or (b) evaluation consulting firms where staff evaluators discussed their concerns and, again, students reflected together on how they might be addressed. Participants rated these trips highly. They reportedly enjoyed these outings and learned in the process.

7 The Edward F. Kelly Evaluation Conference is "a graduate student organized regional evaluation conference, whose goal was to provide graduate students in the field of evaluation an opportunity to present original research and network with professionals in the field" (https://kellyconference2014.weebly.com/).

Other MESI trainings/programs. Spring Training was MESI's signature offering, but in addition, over its 23 years the Institute sponsored other trainings. Some of these were typical offerings. During the two summer trainings, we offered focused sessions on specific cultures, i.e., how to conduct evaluations in the Somali, Hmong, and Latinx communities. In addition MESI staff also conducted trainings on specific subjects (e.g., project management, interpersonal skill development) or contracted to do off-site evaluation trainings on topics like an introduction to program evaluation or evaluation capacity building as a hoped-for revenue source. Unfortunately, these never developed into a meaningful revenue stream as the cost/benefit of these sessions made them non-viable. In fact, a group project one summer by Humphrey policy students studied the fiscal viability of such on-demand evaluation trainings in the Twin Cities area. Their results were discouraging because they documented the unlikely financial success of such sessions. Over time, then, rather than charging for formal trainings (apart from Spring Training), we eventually created informal cost-free sessions for interested participants: (a) brown bag lunches where local evaluators offered tips and guidance on community-based evaluation (2013–2014), and (b) a discussion group on principles-focused evaluation (2017–2019).

In addition there were two innovative MESI training programs that were each successful for a short time, but did not survive: the Evaluation Fellows Program (EFP), and the Graduate Review and Improvement Program (GRIP). The EFP was developed in 2008 to address two distinct issues in evaluation education: (a) the challenges of evaluation in a specific content area, i.e., the overlap between content and evaluation knowledge (King & Stevahn, 2015), and (b) the varying needs of people in different roles in any evaluation setting (e.g., managers vs. front-line staff). There were ultimately three cohorts of individuals in different organizational roles. Every cohort included evaluators, practitioners, and funders; cohorts 1 and 2 also included policy makers. The EFP provided a year-long educational experience related to evaluation in a specific content area: after-school time (2008–2009), school reform (2009–2010), and, seven years later, community development (2017–2018). For the first two cohorts, the experience began with a two-day (including one overnight) seminar in October, followed by monthly half-day training/work sessions through April when mixed-role teams presented the plans and results to date of integrative evaluation projects. After the initial two years, we were unable to find funding to continue the program (we had hoped to offer one on public health) despite highly positive reviews from those who took part.

Years later, discussions about a collaboration between MESI and a community organization resulted in one final EFP offering that engaged evaluators, practitioners, and funders, but, recognizing the political nature of the work, no policy makers. Unlike the first two cohorts, it did not require participants to work on a collaborative project, and when the year ended, so did the EFP. Although never fully realized, EFP's overarching vision was to engage cohorts annually on differ-

ent topics over many years so that, slowly, Minnesota's state evaluation capacity would grow and multiply. There was some evidence of how that might have worked when two participants from the first cohort who had taken part when they held one role took on different roles in other organizations and reported bringing useful information from their EFP experience.

MESI's other innovative program was the Graduate Review and Improvement Process (GRIP), which was, in essence, an evaluation capacity building program for the University's graduate programs, a mechanism to support a culture of evaluative thinking in and across departments/units at the University. In collaboration with the Graduate School, GRIP developed a set of cross-disciplinary evaluation activities that were implemented in 20 diverse programs across the University from 2012 to 2015 (Hakkola & King, 2015; Hakkola et al., 2017). Unlike much graduate review, the process deliberately included program students, staff, faculty, and alumni during each stage of the evaluation and specifically highlighted student perspectives. Three questions framed the process: (a) What purpose does the [graduate] program serve? (b) How well, and how effectively, is the program meeting this purpose? and (c) With what evidence, and/or rationale, will we know? Advanced Evaluation Studies doctoral students led a one-credit fall seminar for non-evaluation graduate students in participating programs on how to conduct their evaluation, which was then completed in the spring. At the end of the year, a joint reporting session and celebration brought everyone together to reflect on what they had learned. Despite extremely positive results over three years, funding for GRIP ended when the Graduate School dean who had supported GRIP departed, and a new dean, not seeing its value, chose to use the resources in other ways. Ironically, the scholarly article about GRIP appeared after the program had been canceled!

A University-Based Evaluation Consulting Firm. Training was core to MESI's operation, but from the beginning it was coupled with ongoing evaluation consultations. Field experiences marked an explicit way to make the connection between evaluator education and the world of practice, linking university students with the programs and organizations where evaluation takes place. Placing students in practica, internships, and consultancies of varying lengths and levels of commitment gave them important experiences, but provided benefits to others as well, e.g., bringing the field's newest ideas to the world of practice and enriching theoretical knowledge, skill sets, and practical outcomes on both sides of the endeavor. Such field experiences created a win/win situation. Through them MESI sought to create linkages among students, faculty, and the people who hired evaluators, participated in projects, and used the results. In addition, universities, especially land grant universities like the University of Minnesota, are theoretically committed to using research and evaluation processes to help improve communities; MESI was a way to do that by making cost-effective evaluation available to the community. After some local evaluators protested to me that MESI could undercut their business, we chose $50,000 as the maximum dollar range of projects we would go after. We

routinely referred people to other evaluators or to existing university centers for larger projects.

A second MESI function, then, was to provide high quality/low cost program evaluation consulting. As described previously, MESI matched qualified students with organizations that needed evaluation: screening applicants to create a pool of pre-qualified student evaluators, selecting organizations, pairing them with qualified students, and then monitoring the evaluation process. We originally called these projects "internships," but changed the name to "consultancies" because students were usually providing consulting services rather than working as organizational interns. Support for students took many forms: coursework and trainings, the internship class, one-on-one advising, and access to resources (including job postings). Ideally, advanced Evaluation Studies doctoral students provided individual coaching and support to these novice evaluators, and, at best, students had multiple résumé-building opportunities by conducting evaluations in varying settings. It was important that the consultations were grounded in and supported by an academic department for two reasons: (a) degree and certificate programs provided ready access to capable students, and (b) the academic program structure provided continuing support through course offerings.

Not surprisingly, because MESI's goal was to provide *low-cost* evaluation services, finding organizations eager to collaborate was never a problem. In 2012, for example, project budgets ranged from $0 to $21,640, with an average budget slightly above $5,000. Student honorariums ranged from $0 to $10,600, with an average honorarium of $2,385, well below the cost of an official quarter- or half-time university research assistantship. Almost two-thirds of the 26 projects that year (65%) were conducted by individual student evaluators, while the remaining projects had evaluation teams of two to four students.

MESI evaluation projects were one of two types: (a) community- or (b) university-based. Table 3 provides the names of some of the community and university projects that supported students during the years of MESI's growth, showing the diversity of these connections. MESI's consultation function, then, did at least three things. First, it provided graduate students opportunities to hone their evaluation skills in different "real world" settings, both in nearby communities and at the university. Second (and related), it helped these novice evaluators in need of support to transition to professional practice. Finally, it offered cost-effective evaluation services to community and university programs to support their learning and improvement.

Evaluation Resource Center. MESI's third overarching function was serving as a university-based evaluation clearing house and resource center for all things related to program evaluation, both within the university and in the community. The idea was to become the place for students, faculty, staff, and community members to learn about evaluation at all levels (local, state, national, and inter-

Table 3: Sample organizations/programs/departments that worked with MESI during its growth years (in alphabetical order by category)	
External Projects	**University-based Projects**
• Anoka-Hennepin Independent School District #11 Indigenous Education Program • Art-A-Whirl, Northeast Minneapolis Arts Association (NEMAA) • Collaborative Crop Research Program (CCRP), McKnight Foundation • Comprehensive Arts Planning Program (CAPP), Minnesota's Perpich Center for the Arts • Evaluation capacity building for Neighborhood House, a settlement house in West St. Paul • Hennepin County Stable Families Initiative • Minnesota Historical Society • Nice Ride Project, Blue Cross Blue Shield (BCBS)	• Alternative Licensure (Teach For America), College of Education and Human Development • Ambit Network of the Center for Advanced Studies in Child Welfare • College of Education and Human Development Dean's Office iPad project • GRIP collaborations with several departments • Institute for Global Studies • Institute on Mathematics and its Applications • Resilient Communities Project • Upper Midwest Agricultural Safety and Health Center (UMASH) • Urban Research and Outreach-Engagement Center's (UROC) Northside Community Response Team (NCRT)

national). In other words, "If you have any question about evaluation, contact MESI, and you will get a timely and helpful response." Pleasants (2014) wrote about the need for such a resource center:

> . . . community organizations crave a "one-stop shop" to meet a variety of evaluation-related needs, such as evaluation capacity building; help with data collection, analysis, management, etc.; genuine, sustained, real relationships with evaluators; opportunities to network with evaluators; well-connected communities of practice; access to the research available through the University of Minnesota; and physical evaluation resources. (p. 38)

Thanks to Will Craig, a long-time ally at the Humphrey School who had claimed it, our email address was *evaluation@umn.edu*, and our website provided an evolving list of evaluation resources and links as well as a request form that people could fill out if they needed a consultation. From a systems perspective (Eoyang & Holladay, 2013), we hoped to create a permeable structure based at the University of Minnesota, one that people—regardless of age, position, or role—could easily access to connect, reflect, and learn about evaluation from each other.

In practice this meant that we did a number of things. Contacting and navigating a university as large as ours can be daunting, and we worked to make evaluation contacts as straightforward as possible. We had an accessible website, one phone number, and an easily remembered email address. This facilitated access to helpful information (e.g., about grant writing, employment, training opportunities, and certificate and degree options), evaluation resources, and support (e.g., help with "all things data," i.e., collection, management, analysis, and reporting). MESI could arrange short- to long-term consultations and collaboration with university personnel for community members, as well as providing access to cutting edge research and the researchers conducting it. In our initial expansion years, the Associate Director made sure that people received a response to any contact within 24 hours, a response rate that, in retrospect, severely tested our limited staffing. She noted, in retrospect, that the university bureaucracy demanded a great deal of her time:

> . . . over half my time (at 20 hours per week) was dealing with university systems trying to get contracts and projects through. There was lots of chasing people down internally to get anything done. (Laura Pejsa, personal communication, 3/15/22)

Oftentimes community members contacted MESI because they were looking for an evaluator. For larger projects we routinely provided referrals, serving as a matchmaker or honest broker, directing people to others who might be better able to answer a question or to take on their project. On occasion, research faculty who were writing grants were required to include a section on evaluation, which we were happy to provide. For smaller projects (typically those under $25,000), we helped people frame their studies then, if there were available resources, negotiated a contract and identified student evaluators to conduct the study. If resources were not available, we sought volunteers from our pool of pre-screened students to work on the project.

In addition, MESI unavoidably served as a feeder system to University-based evaluation training options (i.e., the 12-credit Program Evaluation certificate and

the MA and PhD degree programs). Over 23 years, people who contacted us or participated in our trainings frequently enrolled in coursework. The goal always was to help individuals have a positive evaluation experience, however large or small the contract. Our hope was that this would eventually foster community building and networking, creating the potential for genuine, sustained relationships between evaluators and community members.

Finally, in MESI's role as an evaluation clearinghouse and through personal interactions sustained over time, we also sought to build an interdisciplinary network of practicing evaluators across the university. MESI's intention was to bring expertise together from across the university through direct outreach to faculty and students across campus (e.g., international development education, public affairs, public health) and through the Advisory Board described earlier, which also connected university faculty and staff with community evaluators. To our disappointment, hopes for an eventual interdisciplinary master's and PhD in program evaluation and active integration with other certificate programs (e.g., grant writing, museum studies) never materialized.

Potential Collaborations. Across the years, being keenly aware of the potential value of aligning MESI with other organizations, we sought to create collaborative relationships with six of them. The potential collaborations, none of which came to fruition, had two goals: (a) providing additional resources and a way to sustain MESI; and (b) simultaneously creating visibility and a broader support network that would help build professional community and ultimately improve the quality of program evaluation across the state. Table 4 details six units with which we sought to collaborate at various times and what we did (or attempted to do) together. Only one of them was from outside the university, and that effort was in conjunction with a unit based at the University of Minnesota.

While it made sense to identify potential collaborators within the university, we also engaged in a small number of external collaborations. After two Norwegian professors attended Spring Trainings more than once, we discussed creating a joint master's degree program and even went so far as to engage the university bureaucracy required to put it in place. When our Norwegian colleagues were unable to get their university's commitment and funding to support the effort, the discussions ended. In addition, on several occasions MESI also hosted international visitors, providing introductory evaluation training to groups from India and several countries in Africa.

To my mind, MESI's overarching outcome was the creation of a thriving network or professional community through which people based at the university in any role could get to know and collaborate on evaluations with people living in the community and serving in a variety of roles. This community could potentially "market" the field of evaluation both inside and without the University to people unaware of its scope and value, help integrate new evaluators into professional practice, and provide learning options to keep experienced eval-

Table 4: Units with Which MESI Sought to Collaborate	
U of MN Department/ Organization	**How We Collaborated**
Humphrey School of Public Affairs	• Humphrey faculty were extremely active on the MESI Advisory Board across the years • Numerous Humphrey students became Evaluation Studies doctoral students
University of Minnesota Extension Service's Consortium on Children, Youth, and Families	• They organized the 2010 meeting of faculty/staff from across the university • They funded the first cohort of the Evaluation Fellows Program (on out-of-school time)
Office of Public Engagement	• We met with the newly hired Vice-President of Public Engagement several times, but developed no projects and received no funding
The Center for Urban and Regional Affairs (CURA)	• CURA staff attended MESI trainings • We met twice to discuss possible collaboration, given their recurring legislative funding
Hennepin (County)-University Partnership	• We met several times over three years about developing a formal collaboration • We conducted one large-scale evaluation for Hennepin County and had hopes for ongoing collaboration that never occurred
The University of Minnesota and University of Wisconsin Extension Services*	• We had a series of planning meetings, including traveling to Wisconsin to meet together in person • Extension faculty presented at the 2017 Spring Training

* This final possibility became known as the Orange Moose Group (OMG) once we held a planning session at a venue between the Twin Cities and Madison that featured a larger-than-life-size statue of an orange moose.

uators up-to-date. Thus, my long-term hope was that over the years the interactions that MESI facilitated would organically build a thriving evaluation community in the Twin Cities and region. Networks of personal connections would be created, helping people to get hired or to find appropriate evaluators, to stay current on developments in the field, to provide support to newly-minted evaluators, and so on. Over time students would graduate and take positions as staff, administrators, or evaluators in organizations, and people from organizations might come to the university to participate in trainings or work on certificates or degrees. Interactions involving diverse perspectives—students, community-based practitioners, university researchers, and trainers—and not privileging those with power and resources would enrich everyone involved.

How Was MESI Funded?

For the years that MESI was informally structured, funding wasn't a major consideration. In its initial stage, it successfully lived on a shoe-string budget. Through a competitive grant, the college provided support for the first year's training, and after that our goal was only to break even on trainings. By not seeking to make a profit, we could keep training costs reasonably low, and, as noted previously, we even had a special rate whereby students paid only enough to cover the venue and food expenses. In addition, for many of these early years, again as noted previously, Corcoran funding paid to bring the field's leaders to speak at MESI Spring Training. When that funding ran out, we continued the tradition of national speakers, but had to cover their expenses.

After we decided that MESI should become a full-time staffed entity within the university, this informal structure changed, and funding issues became central. At that time we became in essence an unfunded non-profit organization within the university, which meant that we had to deal with all the rules and constraints of a huge bureaucracy while trying to generate sufficient funding to continue our work. A few of us who cared about MESI (myself and several students and faculty) didn't mind volunteering our time, enjoying the cause and the company of people committed to it, but for the first time MESI needed to generate significant funding. But, because we had structured MESI's two core activities absent the criterion of making money, this proved challenging. Spring Trainings were purposefully designed to break even. Some years they made a few thousand dollars; other years they lost a similar amount, but with the Department's support, MESI remained financially viable. That was no longer good enough.

MESI's other source of revenue was consulting projects. Originally, as noted above, MESI received support from OLPD for research assistants (RAs), highly qualified doctoral students who functioned as MESI staff, helping with the trainings and all things MESI. When that support ended, there was the expectation that MESI would cover the cost of RAs through the evaluation contracts it took on, as many university-based research centers do. However, again, because

we eschewed going after large contracts and the contracts MESI engaged in were typically small—the kind of low-funded projects that evaluation firms and independent evaluators might be reluctant to take on—the amount of revenue generated was in most cases insufficient to pay the cost of an RA's salary at the university, especially once the university raised the salary to include health benefits.8 The Graduate School administration was extremely reluctant to allow students to work for a small honorarium since that undercut the system of meaningful student support through research assistantships. In some cases community groups simply contracted with students directly rather than going through the university.

Another challenging budget constraint was the need to satisfy the well-established bureaucracy of a research university that was developed and perhaps made sense for multi-million dollar federal grants, but not for projects worth only thousands of dollars. At the time MESI was trying to expand, the university's Sponsored Project Administration (SPA) had an indirect cost rate of roughly 52% of a proposal's budget. This amount was untenable for our low budget projects with community organizations or university departments. We eventually created a mechanism for bringing project money into the university that used a much lower minimum—at most a total of $5000, but even that could be reduced if necessary. Because of the challenge of bringing small projects into the university, MESI staff ended up primarily serving a match-making function, connecting students with people who needed evaluations regardless of the limitations of finances. In the words of Melissa Haynes:

> Honestly, while I knew that evaluation was a growing field without a good way to link who needed evaluation with who could do it, I was floored by this part of the job. I spent time on the phone with agencies developing their evaluation RFPs, trying to give advice and feedback to them on how to set criteria to find what they were looking for... I spent countless hours meeting with students, with organizations, trying to make those matches. Sometimes I would just connect people, and I feel like that was an important part of the job. People STILL contact me because of this work. . . (Melissa Haynes, personal communication, February, 2022)

If these students for whatever reasons didn't participate in support activities (e.g., internship class), I fear that their learning may have been compromised.

In hindsight, the Institute did generate funds that benefited both the department and the university, but not MESI itself. In addition to MESI staff teaching courses, Bowman and Illes (2016) note that "MESI, by itself, is not a revenue generator; however, MESI can be credited with bringing (directly or indirectly)

8 The current cost of a 12-month, quarter-time research assistant (before inflation) was around $23,000.

many new students to the Evaluation Studies program — which has been a substantial revenue source for the University" (p. 12). We were never able to leverage this fact to support the Institute.

Section Summary

This completes the detailed description of MESI, including its grounding within the University of Minnesota, the years that it functioned, the people who participated, and its intent and *modus operandi*. The competencies that MESI sought to develop in its participants clearly encompassed all five domains of the 2018 Evaluator Competencies of the American Evaluation Association:

- Professional practice competencies that focused "on what makes evaluators distinct as practicing professionals"
- Methodology competencies that focused "on technical aspects of evidence-based, systematic inquiry for valued purposes"
- Context competencies that focused "on understanding the unique circumstances, multiple perspectives, and changing settings of evaluations and their users/stakeholders"
- Planning and management competencies that focused "on determining and monitoring work plans, timelines, resources, and other components needed to complete and deliver an evaluation study"
- Interpersonal competencies that focused "on human relations and social interactions that ground evaluator effectiveness for professional practice throughout the evaluation" (AEA, 2018; King, 2020)

What follows is an analysis of MESI's underlying logic, criteria and indicators for its success, and the ways in which it both succeeded and, ultimately, failed.

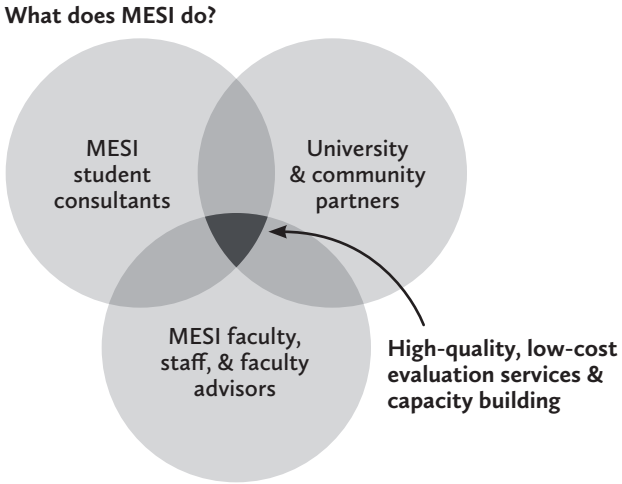
The Logic of MESI

Because students involved in MESI were formally studying evaluation, we knew the potential value of a logic model or theory of change by whatever name (Funnell & Rogers, 2011). Such a diagram could enable targeted data collection over time on MESI's processes and outcomes, even on the long-term outcomes of creating long-term relationships and building/sustaining a larger community evaluation network. As a result, several students attempted over the years to diagram the logic behind MESI. Consider, for example, Figure 3, which replicates an image from a poster prepared for an AEA conference highlighting MESI's training function and includes a three-circle Venn diagram of the "Minnesota Evaluation Studies Institute Model" (Gensinger, 2013). One circle was labeled faculty and staff advisors; a second was labeled MESI student consultants; and the third was labeled university and community partners. On the area marking the three circles' overlap was the phrase "high-quality, low cost evaluation services and capacity building," an assumed outcome. Or consider a second "model" (Pleasants, 2014, p. 59), which included another far more detailed "theory of action model," which he labeled "complex." It included 45 boxes related to MESI's consulting and training: six outcomes,[9] 12 outputs, 16 activities, and four resources. An additional seven boxes highlighted the role of the Advisory Board, "interested" university faculty and staff, "interested" students and organizations, and the MESI coordinator/"evaluation expertise."

What was clear from these efforts was exactly how challenging it was to diagram MESI's functions in their entirety. And even if such a detailed chart could

9 The six outcomes were the following: "students gain evaluation skills and competencies"; "students increase their employment prospects"; "organizations have positive experiences with evaluation"; "organizations increase their evaluation capacity"; "evaluators and organizations gain new evaluation skills and competencies"; and "there is a useful interdisciplinary network of evaluation stakeholders" (Pleasants, 2014, p. 59).

Figure 3: MESI's Functioning as a Consulting Unit



accurately capture the intricacies of what MESI did, actually *using* it also created an obvious challenge. In reality, little is known about how the multiple boxes and corresponding arrows in such an educational "theory of action" actually identify how various components work (King & Ayoo, 2019). For the present analysis, then, I instead propose three far more simple logic diagrams (Figures 4, 5, and 6), one for each of MESI's primary functions described above. These figures highlight places where data might ultimately affirm or at least suggest a causal development of outcomes.

- **Training** Figure 4 details assumptions about what could happen when people—students or community members—attended MESI trainings. Certainly they should gain knowledge and skills as a result, which could help students become better evaluators and might lead members of either group to decide to become evaluators. Students who didn't become evaluators might eventually have positions that would require them to participate in evaluations and use their results; their MESI experience might prepare them to do this effectively. Also the hope surely was that, once staff had attended trainings, their organizations might increase the capacity to do or use evaluations and become more effective, whatever that might mean in their context. In addition, the logic suggests that anyone who decided to become an evaluator could find support and relationships in the MESI community. Then, in time, MESI might achieve its broad outcome of building and sustaining a larger network of evaluators and users.
- **Evaluation Consulting** Figure 5 again includes both students and community members, in this case working together to plan and conduct an evaluation study with support from MESI. As a result,

Figure 4: Logic of MESI's Evaluation Training

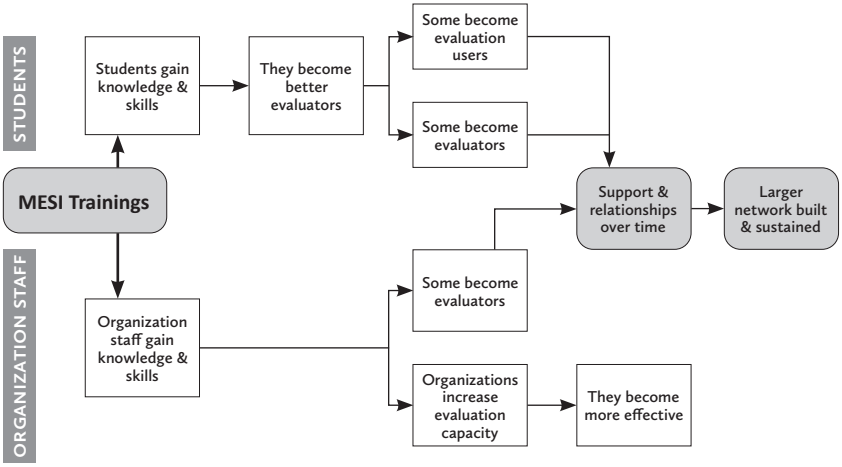
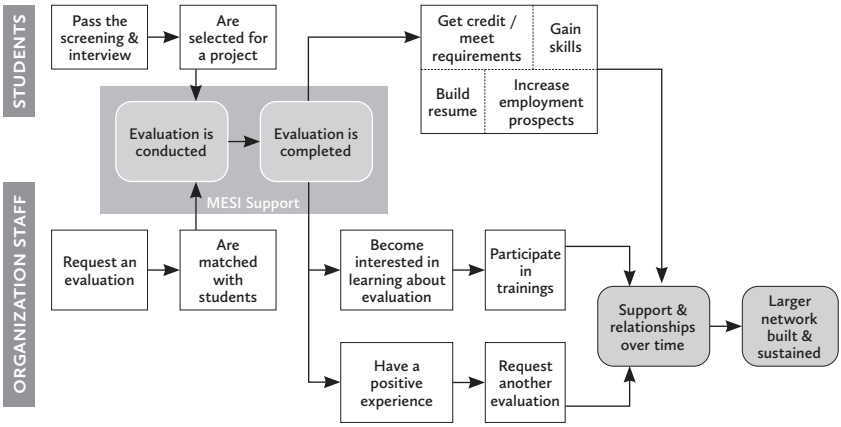


Figure 5: Logic of MESI's Consulting

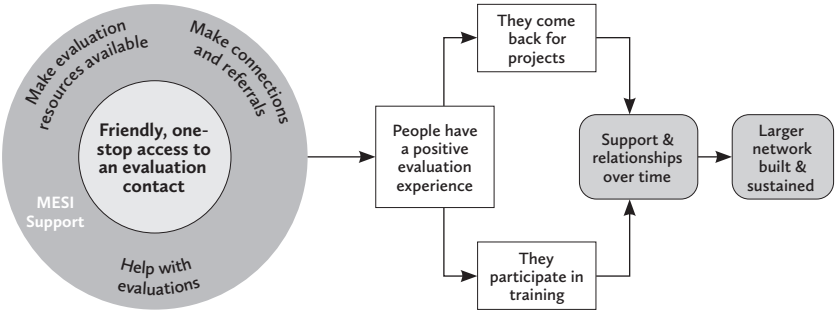


students might achieve four outcomes: (a) simply meeting course or degree requirements, (b) gaining evaluator competencies, (c) building their résumés by adding an evaluation project, and (d), in so doing, increasing their employment prospects. Organization staff might achieve different outcomes, including the decision to attend evaluation trainings or to request another evaluation. Both groups might experience support and, eventually, build relationships that could lead to a larger community evaluation network.

- **Evaluation Resource Center** Finally, Figure 6 presents the logic of MESI's role as an evaluation resource center, a constellation of actions to build one-stop access to evaluation information in the university. Assuming that this would lead to positive interactions, faculty, students, or community members might decide to engage in other evaluation projects or to attend MESI trainings. Doing so might increase both support for evaluations and for relationships, leading eventually to a sustained community network.

These figures outline—post hoc—the logic that grounded MESI's work and provide a framework for identifying data to document the effects of various activities over 23 years.

Figure 6: Logic of MESI's Role as an Evaluation Resource Center



Criteria and Indicators for MESI's Success

Another approach to discussing MESI's outcomes would be, based on Scriven (1980), to identify the criteria for knowing that the Institute was a success. Again, based on a post-hoc analysis, Table 5 includes eight such criteria along with the focus and possible indicators for each. Two of the criteria apply to people working in either internal units or external organizations, one applies to University of Minnesota students, four apply to all MESI participants, and the final criterion—which, in retrospect, is the most salient—applies to MESI itself.

1. **Visible** With its goal of being the principal place at the University for resources about and connections to evaluation, it was important to have contact information for MESI extremely accessible and widely available. People needed to know we were there and ready to help.
2. **Affordable** Over its 23 years MESI sought to make evaluation services available to organizations that lacked the resources to hire professional evaluators whose fees, even when reasonable, were often unattainable.
3. **Supportive** MESI sought to help students complete course and degree requirements, build their non-academic evaluation experience, and, ideally, provide financial support for their studies. Given our central involvement in evaluator education, this criterion was critical within the academic context.
4. **Positive** This criterion relates to MESI's ability to deliver on its promise of providing non-threatening access to evaluation resources without bureaucratic barriers. Even in the context of a research university's hierarchical culture, the organization's ethos would put participants

Table 5: Criteria and Possible Indicators for MESI's Success		
Criterion	**Focus (Outside Organizations or Students)**	**Possible Indicators**
Visible	Outside organizations	• People know how to contact MESI with evaluation questions/needs and do so
Affordable	Outside organizations	• MESI provides affordable evaluation services • People's ongoing evaluation needs are met
Supportive	Students	• Students meet requirements for courses/degrees • Students build resumes/increase job prospects • Students get financial support
Positive	Both	• People feel supported when they contact MESI • People feel comfortable interacting with MESI staff • Resources are available • People get answers to their evaluation questions • Personal connections are made • Ultimately a support network exists

Helpful	Both	• Students and other participants find trainings useful
		  • Learn about evaluation
		  • Gain skills
		  • Increase number of personal contacts in field
		• People feel free to contact others about evaluation concerns
		• People become better evaluators

Inspiring	Both	• People have positive experiences with evaluation • People become enthusiastic about the field • People consider becoming professional evaluators or building it into their work • Ongoing discussions of and involvement in evaluation occur
Interdis-ciplinary	Both	• Projects come from a variety of different fields (public health, education, human services, etc.)
Sustainable	MESI as an organization	• Organizations continue to request and pay for consulting services • Trainings and consultations generate sufficient revenue to support other MESI activities • MESI has sufficient staff to minimize burn-out

at ease and make them feel welcome and included. MESI sought to nurture a culture and community where people, regardless of their role and level of knowledge or expertise, could engage equally. We would never patronize, but respond to questions in a manner that would elicit a positive reaction and entice participants, ultimately, to become collaborators in a diverse evaluation network.

5. **Helpful** Students were important MESI participants, but so, too, were the many non-students of all ages who attended trainings, commissioned evaluations, and made connections. Our goal was for everyone who attended MESI trainings or connected in other ways with the Institute to gain evaluation knowledge and skills as they simultaneously increased their personal connections in the field. The desired goal, of course, was for people to become better evaluators or users of evaluation.
6. **Inspiring** MESI's basic goal—the result of positive, inclusive, supportive experiences—was to create people who were enthusiastic about evaluation, people who knew what they knew and what more they needed to know, who were excited to engage with others, and who evinced that sensibility wherever they went. Such inspiration in the long run might create relationships and a network in the Twin Cities area and perhaps even beyond.
7. **Interdisciplinary** Because evaluation is a transdiscipline, it is necessarily part of every field and discipline (Scriven, 1991, p. 364). MESI sought to engage in evaluations in a wide array of possible subjects, including those present in the many colleges and programs across the university.
8. **Sustainable** Given the lack of university funding, one component of this criterion for MESI's continuation was its ability to generate sufficient funding for its own support. Funding was generated in two primary ways: trainings, and consultations. A second component of sustainability related to supporting professional MESI staff to avoid their burn-out.

Ways in Which MESI Succeeded

Working on this e-book has been bittersweet. On a personal level, MESI was an ongoing and signature commitment in my professional career at the University of Minnesota, and the work was personally enriching. To my mind, over 23 years we succeeded in creating a warm circle of Evaluation Studies students and professionals in the community. It pains me, therefore, that MESI is likely to no longer exist, especially since I see in retrospect what I might have done differently to—perhaps—sustain it.

Was MESI successful? For me the answer is yes, and the following section will provide evidence to support that claim. Some might argue that MESI's mere existence for almost a quarter of a century constituted one form of success, but perhaps more important are the specific outcomes we can document, even if they are few. To be clear, the following discussion is not based on a structured study of MESI's 23 years, but rather the compilation of my memories and a small number of reports and theses generated at two points: first, in the early years of MESI's full-time efforts, and second, when an inevitable transition loomed.

One source of evidence, although never formally published, is the evaluation results for the annual trainings. These were routinely positive (see Table 6 for sample comments), and we carefully used people's suggestions and negative comments to shape the following year's offerings. In addition, four formal papers (two master's theses, an AEA conference presentation, and a commissioned evaluation) provide limited empirical data about MESI's outcomes. Subialka Nowariak (2014) interviewed 10 students who were active in MESI and categorized their perceived outcomes into three broad themes:

- Building knowledge and skills, which included "honing technical skills," learning the "practical side of evaluation," and "understanding evaluation context"
- Gaining confidence and seeing/understanding themselves as evaluators while building future job opportunities
- Helping to support or integrate other content and experiences

When asked about how they learned, these students highlighted the importance of peer learning, including the value of dividing tasks, brainstorming, and providing encouragement to each other. The interviews also detailed the importance of negative experiences in the field—overcoming roadblocks, "pushing through the uncomfortable," and taking the time to observe and reflect on them (pp. 17–18). In addition, students reported that their MESI experiences facilitated a better connection to their academic program, along with networking and a sense of enhanced job prospects.

A second study of MESI, one that was presented at an American Evaluation Association annual meeting, focused on the client experience (Gensinger, 2013). Thirty-four clients were surveyed, and 25 responded (a 74% response rate). Overall, the results documented positive experiences. Clients reported that collaborating on a MESI project helped their organizations, with staff learning new evaluation skills and, in some cases, even gaining an improved attitude toward evaluation in general. The third study, Pleasants (2014), proposed to "set the foundation for a research agenda" for MESI by reviewing the empirical literature on field-based training, developing a theory of action for MESI (mentioned previously), and summarizing the two studies described previously.

Table 6: Sample comments from Spring Training evaluations
• "Attending the conference helps keep my thinking current and refreshed, and my energy renewed. Also, it's really good thinking time in an otherwise hectic year!" • "The communal atmosphere, the warm invitation to learn, and the authenticity of the professionals presenting are why I continue to attend MESI from Nebraska." • "To continue to learn and expand networking. . ." • "I welcome MESI's ongoing emphasis on evaluation work as a way to do tangible good in the world and not merely as a way of measuring processes and trends." • A field trip comment: ". . . the experience more than met my expectations; more importantly, the day was truly empowering, enlightening, energizing, enjoyable, and exceptional for me, both personally and professionally."

Finally, in 2015, when it became clear that my role as MESI's founder and volunteer leader would end with my retirement in the relatively near future, the Advisory Board commissioned two PhD alumna to conduct a study to identify MESI's current status and ideas for sustaining it after I left. Remember that by this time, MESI had no staff other than an unpaid director and students who volunteered their time on specific tasks. Bowman and Illes (2016) looked for valued outcomes that would justify continuing the Institute. They noted that "MESI has been the real touch point for information about evaluation—[a] strong basis to provide education and support" in the community (p. 8). They also wrote that

> MESI should continue. . . [I]t has to be valuable for evaluation students to have the on-the-ground /real life experience while they are going to school. As a land-grant university, it seems a viable way for the U[niversity] to provide a service into the community and for those of us in the community to see the benefit from the presence of the University in the community. It also helps get rid of some of the "pie in the sky" thinking that evaluators often walk around with...The individuals see how it works on the ground, and it's not the theory—it's the practice. (p. 9)

The more important question Bowman and Illes addressed, however, was how to sustain the Institute in the future. Being part of the University had benefits—"instant credibility"—but the serious downsides of "fostering confusion and a frustrating level of bureaucracy" (p. 9). The study identified two key barriers going forward. First, the question of who might become MESI's new leader resulted in no obvious candidate; "[t]here were no 'Ah Ha' moments in the discussion around who would be a viable and credible leader to replace Jean King" (p. 11). The second and clearly more serious barrier was a continuing lack of financial support (p. 11), with no discernible way to generate sufficient funds:

> Neither the pre-workshops nor the Spring Trainings themselves are obvious or substantial revenue generators; in some years they incurred losses. . . In commercial marketing terms, the annual Spring Training might be referred to as a loss leader. . . MESI, by itself, is not a revenue generator. (p. 12)

Having raised these critical concerns, the report offers no solution.

At a planning meeting the following year, the Advisory Board discussed the results of Bowman and Illes in thinking about the inevitable "MESI Morph." The Board reached consensus on three points:

1. "MESI, as a training opportunity, is a service to students and outreach to the community within and outside of the University. . .
2. Evaluation Studies could be described as the magnet that has brought experts to teach and students to study evaluation at the University. MESI could be described as the glue that has bound the community to the students as they both come to appreciate the practice and implement evaluation in their programs. . .
3. MESI is not commonly understood in either the university or the community." (MESI Advisory Board, 2017)

While there was hope that MESI might continue—there was a new Evaluation Studies faculty member and reported interest in maintaining MESI in some form— the way to do so was not obvious. By that time I was in the second of three years of phased retirement and transitioning from university commitments. With limited resources available, I made the decision (with the Advisory Board's support) to do two things: (a) continue Spring Training and informally connecting students to projects as MESI had done in its first phase, and (b) launch a series of MESI e-books that I would edit to provide a place for publishing useful, practical content about evaluation. This is where matters stood when the pandemic struck in March, 2020, and academic life as we knew it came to a sudden standstill.

Applying the present paper's descriptive details along with these limited findings to the criteria described above provides an informal evaluation of MESI's success. There is at least some evidence to support seven of the criteria: MESI was visible; organizations could afford to commission evaluations, and many did; it supported

students and other participants, helping them to conduct studies, develop skills, and learn about evaluation; it inspired some to go on in the field; and, given the range of projects undertaken, it was interdisciplinary. But MESI's inability to meet the final criterion—sustainability—led ultimately to its inability to survive. Let me add one final comment about evidence documenting MESI's success.

One of the keynotes at the 2021 Annual Meeting of the American Evaluation Association featured an Evaluation Studies alumna, Vidhya Shanker, and her colleague Aisha Rios. The session description included the following sentence:

> Dr. Aisha Rios and Dr. Vidhya Shanker met in 2015 at the Minnesota Evaluation Studies Institute, where they connected around their shared passion for challenging dominant evaluation narratives and practices; their abolitionist politics; and their formative experiences theorizing and organizing against state violence. (AEA, 2021)

Is this not additional evidence that MESI succeeded in creating community?

Why I Believe MESI Failed to Thrive

Hindsight, as the saying goes, is 20/20, and by now the reasons for MESI's demise seem obvious. In retrospect it is no surprise that it was unable to become financially sustainable. With volunteer leadership and minimal ongoing support within the university, MESI had no choice but to become self-supporting. Put simply, there are three ways for an unfunded institute to do this in a university setting and survive long-term: (1) it has to generate sufficient annual funding on its own, (2) an entity either within or outside the university needs to provide such funding, or (3) it needs to develop collaborative partnerships to sustain the work. MESI was unable to achieve any of these.

Inability to generate sufficient funding on its own

As noted above, university-based institutes often support themselves by competing for large grants from foundations or from government entities (city, county, state, or federal). Doing this means that the content of these grants will determine what institute staff do, e.g., studying STEM education in a certain domain, implementing an innovative approach to clinical practice, or evaluating a specific large-scale program. When the intent of the institute matches funding opportunities, this is not a problem. However, from its inception, MESI sought to be responsive to the community and not tied to a given discipline or subject area where grant funding was available. In other words, we elected not to participate in large-scale grant competitions, but instead to seek small-scale, local evaluation projects, as described above, targeting organizations that could not afford to hire professional evaluators. One additional point about context: we chose not to go after big contracts in part because we wanted flexibility, but also because local colleagues told us they didn't want us to undercut them by using what they perceived as "cheap" student labor on evaluation projects. They didn't want unfair competition. The goal, then, was for MESI to go after

smaller projects and to break even. Any funds available would pay the required fees the university charged to bring money in and, when possible, to pay students to do the work. When we could, we added MESI overhead, but in many cases this was not feasible.

If evaluation projects could not be a solid source of revenue, then what could be? Our initial assumption was that evaluation trainings could generate sufficient funding, but this raised a tension between competing success criteria. On the one hand, we wanted to be helpful to participants; on the other hand, we needed to generate funds to sustain MESI. Students often had financial issues that limited their ability to attend Spring Training, and local professionals repeatedly told us they were not willing to pay for what they considered "expensive" trainings, even though the fees charged were far below those charged at national venues. As mentioned, one summer a group of Humphrey students completed a feasibility study about training expenses and confirmed that higher rates were not a viable option (Laura Pejsa, personal communication, 3/15/22). As a result, over the years we purposefully kept the price of training low to ensure that more people could afford to attend. Most years Spring Training at least broke even; those years when there was a deficit, we used the profits of previous years or department funds to make up the difference. The bottom line, finally, was that MESI was unable to generate sufficient funding on its own.

Inability to Find Continuing Support Within or Outside the University

Lack of support within the university. Despite the University of Minnesota's land grant mission, MESI was never able to acquire support from the central administration. It was not for lack of trying. I attended numerous meetings over the years with likely possibilities (e.g., the Center for Urban and Regional Affairs [CURA], the Graduate School, the Hennepin-University Partnership [HUP], the Office for Public Engagement, and the Urban Research and Outreach-Engagement Center [UROC]). While these occasionally generated meaningful projects, with the exception of GRIP, which existed for 3 years but ended when leadership changed, the meetings never led to support for infrastructure.

Lack of support outside the university. When it became evident that funding from within the university was unlikely, one obvious step would have been to seek funding from outside sources. In our university context, this was challenging. To coordinate and streamline the process for large funders, the University Foundation limited the number of proposals that went to certain foundations and created a highly competitive process each year for getting on "the list." We never developed or submitted such a proposal. Another possibility would have been to seek funding from smaller foundations or government agencies (e.g., to evaluate programs or to provide training to their grantees). We had one

contract to do this with a state agency, and another with a large local foundation, but they both ended when the contracts were completed. We never went after other such funding, either. Our schedules were routinely jammed so we always felt short-staffed, and such an effort was simply beyond our capacity.

Inability to Develop Support through Sustainable Collaborations

Table 4, presented earlier, lists several entities that at one time or another engaged in discussions of an ongoing collaboration, none of which ever came to fruition. These potential collaborations were primarily with University of Minnesota units, but one—the Orange Moose Group (OMG)—went beyond campus boundaries. Its story is perhaps the most enlightening because we expended considerable energy on multiple meetings and, I think it's fair to say in retrospect, came close to creating a funded collaboration that actually might have succeeded. We began talking to staff at the Wisconsin Extension when Scott Chazden, a creative MN Extension educator who taught for MESI, thought there might be mutual benefit in working together since both units engaged in evaluation training and could perhaps find funding to support a larger regional effort.

After a series of meetings—including a day-long gathering half-way between Madison and the Twin Cities where we generated our name—we developed a concept paper for an inaugural summer evaluation conference in 2017. The planning group of 18 was purposefully large. It eventually included either representatives or information derived from staff interviews from the following organizations:

- Two Extension offices (Minnesota and Wisconsin)
- Two evaluation training centers (MESI and the University of Wisconsin Madison evaluation program)
- Professional evaluation groups from both Minnesota and Wisconsin (MN EA, iMilwaukeeEvaluation!)
- Minnesota-based evaluation consulting firms (including The Improve Group and Rainbow Research)
- Several local community social service agencies in Minnesota

Knowing that AEA might well support such a regional effort, we hoped to create an evaluation conference modelled on the AEA Annual Meeting. People would submit proposals for review; selected proposals would be grouped into sessions; and participants would present panels, paper sessions, and expert talks. This was clearly in contrast to how MESI's Spring Training worked where presenters were invited and there were no constructed panels or paper sessions. Plans also included one to two days of professional development training before the conference, again using the AEA Annual Meeting model. Like AEA, we would charge people to attend both the conference and the trainings, and our

assumption was that the event would at least break even, although we would seek external funding to support the effort.

Not wanting to take on too much for the first OMG conference (which never occurred), we debated two possible framings. Either we would plan sessions for anyone engaged in program evaluation in the community—the idea was to learn what works in the field—or we would design content for practicing evaluators and focus more on the expert practice of people who called themselves evaluators. In the second case, the pre-conference trainings would not include "evaluation basics." Several WI Extension staff presented at the 2016 Spring Training, and we held a detailed planning meeting that week in hopes of soliciting funding for the summer of 2017. But, although we didn't know it at the time, OMG was in its death throes before it was even born. MESI had no full-time staff by this point, and when financial issues arose that affected both the MN and WI Extension Services, the potential collaboration ended. Busy people moved on to other tasks.

In retrospect it is no surprise that MESI was unable to become financially sustainable. Although we tried, MESI was ultimately not able to become self-sustaining, i.e., to generate sufficient annual funding on its own, to identify a viable funding source either within or outside the university, or to develop even one ongoing collaborative partnership. In the process, I had the privilege of working with Drs. Laura Pejsa and Melissa Chapman Haynes, two committed professionals who labored for many long and stressful hours. But in the end, we gave up on the possibility of MESI's more expansive vision.

Two Challenging Years of Creativity and Hard Work

LAURA PEJSA

I first came to a MESI event as a student in the Evaluation Studies program at the University of Minnesota. At the time, MESI not a fully formed program, but a yearly conference popular with students and Minnesota-based evaluators. I went into the event expecting it to be like every other conference I had attended—impersonal, with long days of lectures and paper presentations. What I encountered instead was an experience filled with passion for the field, practical advice, warm embraces between professionals and friends, laughter, tchotchkes, and a top ten competition (with prizes). It was a surprise and relief to find a community of people who unapologetically loved evaluation and believed they could, in small and big ways, make a difference. The conference solidified my dedication to finishing my PhD in Evaluation Studies, ignited my desire to gain as much experience as possible in the field, and introduced me to Dr. Jean King.

Years later, Dr. King introduced me to the idea of expanding MESI into a full, year-long training institute the University. I shared her belief that we could and should do more to make the University accessible to the community and meet their needs for evaluation. We had a treasure trove of talented and driven students seeking real-world experience, without a structure to vet and place them. When Dr. King offered me the opportunity to build MESI with her after I finished my PhD, I jumped at the chance. I began my tenure as the Associate Director of the Minnesota Evaluation Studies Institute in a part-time, 20 hours per week capacity, without financial support from the University.

What was it like working for MESI? It was exciting, creative, rewarding, and extremely difficult all at once. The best part of building MESI was forging and strengthening relationships—among students, across the University, and in the community. We strove to not only give students real-world experiences doing evaluation in the field, but opportunities to grow together. We built on the spirit of the annual conference to develop an engaging Summer Institute, informal get-togethers, and student teams for community projects. Turning an empty space outside our basement office into a lounge and communal workspace gave evaluation students a gathering place for the first time in the program's history. To make connections across the University, we brought together faculty teaching evaluation content in other schools and departments. We broke down silos, cross-listing courses and building relationships among education, public affairs, and public health faculty and students.

MESI convened University faculty, local non-profit leaders, and government agency representatives for community conversations about evaluation needs in the early days of expansion. The connections we built not only led to evaluation experiences for students, but an Advisory Board to guide the Institute for years to come. One of the most rewarding aspects of my work at MESI was answering inquiries from community organizations who needed evaluation, but weren't sure where to turn; as we built MESI's infrastructure and network, I was able to help with real solutions. Whether the answer was a graduate assistant, a team of students, or a referral to other resources at the University, MESI served as a one-stop shop for connecting the community with University expertise.

The ultimate challenge was taking an Institute focused on learning and service and making it profitable, or at least self-sustaining. At the time, our University was not set up well for accepting and processing small amounts of money. The systems in place were better suited for large, multi-year government and foundation grants—the bread and butter of a top-tier research institution. I spent much of my time as a half-time Associate Director developing work-arounds and facilitating paperwork for time-consuming, alternative methods of funding the work. Our home academic department offered seed money to help fund MESI in the early years, with the expectation that it would become financially self-sustaining. As I discovered, this was an elusive goal. In order to create rich field experiences for students while ensuring that community organizations received high-quality evaluation services, we needed the time and staff to vet, mentor, and supervise those students. Our capacity did not, however, align with the number of projects needed to sustain us financially. Over and over again, we all worked overtime, used volunteer help, and relied on the kindness and dedication of MESI friends to stretch our limited resources.

When I left MESI, it was not for lack of passion for the work or dedication to our students and partners. Dr. King and I recognized that the work far exceeded my 20 hours per week position. We fought to convince the department to help fund a full-time Associate Director. With young children at home, I wasn't yet

ready to take on a full-time position, so I stepped down and made way for my highly-qualified successor. I remained connected to MESI for years to come, however, teaching the internship course, serving as an Advisory Board member, providing training, and attending events. I joined the legions of former students, conference attendees, community members, evaluators, and friends who stayed connected to and through MESI. Although I have over a decade of relationships forged through MESI, I'm still a newbie compared to some, who have been engaged in one way or another for well over twenty years. The year-round Institute may not have lasted, but the community of evaluators that Dr. King nurtured through MESI lives on.

A Final MESI Top Ten List and Concluding Thoughts

This e-book has described the Minnesota Evaluation Studies Institute, which existed at the University of Minnesota from 1996 to 2019. In conclusion, I want to affirm that MESI—which I claim proudly as my brainchild—was an example of how a university program could make meaningful evaluation connections both within the University and with the community over time. It might also have been a way to establish a broad evaluation community by creating interactions and building relationships: students studying evaluation at the University with each other and with staff at community programs; university faculty and staff with each other, with students, and with local evaluators; well-known scholars from around the country with area practitioners and students; and everyone involved with recent advancements in the field. That, at least, was the idea.

MESI began at the end of the so-called "qual/quant wars" and at the time when cultural issues were rising to the foreground in evaluation. Over these 23 years the field continued to evolve dramatically as new topics gained prominence—developmental evaluation, systems thinking, evaluator competencies, new forms of quantitative analysis, technological developments that simplified data collection and analysis, culturally responsive evaluation (CRE), decolonization, and more. In systems terms, MESI was part of a large, land grant research university where faculty and staff competed for resources and where external funding for projects was a continuing expectation. MESI interacted with and was a part of numerous other systems, including school districts, public and private social service agencies, government entities, and numerous departments and multiple units within the College of Education and Human Development and the broader university. In terms of the Venn diagram that includes evaluation as one circle linked to multiple other subject areas or disciplines (King & Stevahn,

Table 7: The Top Ten Lessons Learned from Running MESI for 23 Years	
10	Commit to a MESI-style institute only if you are truly passionate about building an evaluation community.
9	Carefully assess the context of the higher education institution where you are located.
8	Always keep sustainability in mind.
7	Find collaborators who can both help find ongoing funding and amplify the work.
6	Use, but don't abuse anyone who is committed to the cause.
5	Determine how to keep training and consulting costs affordable.
4	Unleash your creativity.
3	Make the work interesting and fun.
2	Evaluate, and regularly correct course.
1	Persist.

2015), MESI sought to make the evaluation circle—the special knowledge, skills, and abilities unique to the field—accessible across various content areas. Available evidence suggests that we were at least partially successful in doing so.

In the spirit of a long-standing MESI tradition, let me offer what I consider the Top 10 lessons I learned about the prospects for and viability of such an institute embedded in a large research university. These are summarized in Table 7. Given the tradition of MESI Top 10 lists, I will go from what, in my opinion, is the least important 10th to the most critical 1st.

10. **Commit to a MESI-style institute only if you are truly passionate about building an evaluation community.** The tenth lesson relates to personal commitment. This work is not for the faint of heart. Based on my experience over many years, few in a research university context are likely to understand evaluation and fewer still to value the necessary commitment to providing students practical—so-called "real world"—experiences in programs and to engaging community members.[1] Many university-based centers can and do exist without making this commitment, and that is fine; they have different goals. My advice is that before you create a center that seeks to build

1 This fact makes me wonder sincerely about the long-term prospects of evaluator education within universities. What other venues might be better able to provide on-the-ground practical training for novice evaluators? If such places don't exist, might we create them?

evaluation community, you make community building an explicit and personal priority.

9. **Carefully assess the context of the higher education institution where you are located.** The ninth lesson has to do with one of the basic features of program evaluation: context (Rog, Fitzpatrick, & Conner, 2012). Before even deciding to create an evaluation institute in a university setting, you should carefully study the higher education institution you are considering. Regardless of its size, determine how decisions about programmatic funding are made. What resources are routinely available for community-based activities? Can you gain access to the people making them, or, better yet, become one of those people? Can you enlist the support of critical actors (those with positional power) and sustain that support as people come and go? Are there external forces, institutions, or leaders that could be helpful? If you bring in external funding, how much of the indirect cost recovery can you access and use independently? Asked routinely, these questions and others will enable you to conduct an ongoing feasibility study for the likely success of a proposed center.

8. **Always keep sustainability in mind.** Lesson 8 involves another one of my rules for living: Keep the big picture in mind (Stevahn & King, 2010, p. 153). I will speak for myself and my failure to follow my own rule. While I ran MESI, I routinely lived in the weeds, worrying from semester to semester about staff and student support, individual projects, departmental and college politics, and so on. I rarely—if ever—lifted my thoughts to issues related to the long-term viability of the Institute, and this, in retrospect, was a big mistake. We succeeded in the short-term, semester by semester, but ultimately failed to create a structure that was sustainable. My advice therefore is to make sure that someone in the organization is tasked with keeping the big picture in mind while others address individual projects and issues as they arise.

7. **Find collaborators who can both help find funding and amplify the work.** Growing and sustaining a worthwhile evaluation community is necessarily a group project so a key task is to identify and recruit collaborators who will support the work. They may be a source of funding, either within or outside the university, in various ways—e.g., through collaborative projects, special funding, or even by recruiting participants for trainings. They may also make connections with different networks of people who can join the development efforts. We had more success with the second task than the first, but I believe both are important.

6. **Use, but don't abuse people who are committed to the cause.** Lesson 6 has both a positive and a negative aspect. On the one hand, MESI continually benefited over 23 years from numerous people who

resonated with the vision of growing an evaluation community of practice and wanted to participate. This commitment and value proposition included many student and community volunteers along with paid research assistants and MESI's two staff members. It is important to engage all comers because that can build momentum and excitement. In hindsight, and not surprisingly, people were MESI's lifeblood and helped sustain it for over two decades. But, on the other hand, it is also important to pay attention to the potential negatives of people's involvement—who is working too many hours, who is getting repeatedly entangled with frustrating bureaucracy, who is feeling overwhelmed by an impossibly long "to do" list, who is underpaid, who feels ignored, etc. Attending to human detail matters, even if it is only to acknowledge a bad situation and seek to redress it.

5. **Determine how to keep training and consulting costs affordable.** I believe that low-cost trainings and consultations are critical to building evaluation community, which is why they were two of MESI's core functions. For 23 years we sought to provide them at a reasonable price, knowing that the people we sought to engage typically did not have funding for what, in their view, were expensive services. Cost containment proved to be a challenging balancing act because the consulting function was a critical source of revenue, and we needed to generate sufficient funding to support MESI's infrastructure. In retrospect, the need for an external infusion of cash to enable us to provide low-cost training and consultation—perhaps from a foundation or government grant or a generous individual donor—was obvious. Or perhaps an institute could offer certain desirable, sought-after trainings at a higher price (e.g., project management training) and provide other, more basic trainings at a reduced fee.

4. **Unleash your creativity.** Lesson 4 focuses on moving beyond routine or traditional expectations. Because innovative teaching was important to me, novel offerings became part of MESI's features. The two innovative programs described above— the Evaluation Fellows Program (EFP) and the Graduate Review and Improvement Program (GRIP)—were unique offerings that brought together evaluators with people in a variety of different roles for mutual enrichment. Other components of MESI trainings—e.g., purposeful interactions in small groups, the annual Top Ten Contest, field trips to social service programs and to evaluation firms, culture-specific evaluation training, and more—were generated through brainstorming different ways to engage participants.

3. **Make the work interesting and fun.** The third lesson clearly overlaps with the fourth. What I learned over the course of my entire career—not just during the MESI years—is that people are willing, even eager, to become part of something that piques their curiosity and engages

them. As stressed as we often were, we were usually working on compelling projects that were teaching us something, and we were able to support each other with smiles on our faces, attention to personal detail, and occasional laughter. When the projects were not all that compelling, the relationships we had built helped us through.

2. **Evaluate constantly, and regularly correct course.** Because MESI was an evaluation institute, we routinely walked the walk, i.e., collected data and reflected on what we should continue doing and what we needed to change. Developmental evaluation was integral to our day-to-day activities; at our best we documented why we made decisions and then followed up on the consequences. Our trainings received high marks each year, and consultant/students and their clients routinely gave their experiences high marks. It is, of course, ironic that even though we conducted routine evaluation, we failed to study the critically important issue of sustainability. Regrettably, we didn't ask the obvious questions that might have allowed MESI to follow a path to permanence.

1. **Persist.** Edward Deming's phrase "constancy of purpose over time" was a MESI mantra. If Lesson 10 required commitment before launching a MESI-type institute, Lesson 1 highlights the importance of persisting. You must be willing and able to bounce back from discouraging developments. A wise Native principal once told me that people will make time for things they consider important, so the real question for an evaluation institute aspiring to build community is what will make activities important enough for various groups of people to commit to them and remain committed. Coupled with a successful plan to raise necessary funding, there may be hope then for developing and sustaining a community resource like MESI.

Final Thoughts

For 23 years MESI engaged in distinctive activities, both within the university and outside: providing annual evaluation training for a sizeable number of students and evaluators; providing "high quality/low cost" evaluation services for local organizations; and building a network of community members who understood and appreciated the field of evaluation and perhaps even learned something about doing it. Located in a state already rich in evaluation resources, MESI strived to be pragmatic, creating a win/win for students who needed sites to hone their skills and organizations that needed affordable evaluation services. Within the university, the possibility of MESI funding created an incentive that attracted students from a variety of colleges into evaluation. But the Institute did not endure. I hope that this e-book will not only become part of the historic record of evaluation writings, but may help others as committed as I, but cleverer or perhaps more astute, to create enduring evaluation institutes that will benefit the communities in which they live.

MESI Top Ten Reasons

How is program evaluation like interstellar space travel?

10. You may meet surprising new life forms.
9. It fascinates some people, while others can't imagine why you'd ever want to go there.
8. You enter a fathomless void teaming with dark energy and black holes from which nothing emerges, not even light, and you ask yourself: Why would something intelligent have created this?
7. It requires the ability to endure long, lonely hours in a hostile environment and still put on a happy face for the funding agency.
6. The government isn't interested in funding either one.
5. Both can make time seem to slow down for outside observers.
4. Site visits are expensive and not always welcomed.
3. It is rocket science!
2. You've got to remember that YOU're the alien.
1. Both have the ability to suck all the oxygen out of a room.

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The Best Laid Schemes o' Mice an' Woman: Anatomy and Autopsy of an Evaluation Institute

The Minnesota Evaluation Studies Institute (MESI) at the University of Minnesota served graduate students, faculty, and community members for 23 years (1996–2019), providing evaluator education, community- and University-based consultancies, and evaluation resources. For four of those years (2011–2015), MESI die-hards made a concerted effort to create a sustainable, self-funded institute that could survive in the context of a research university. They were, finally, unsuccessful. This is the story of what happened before, during, and after those years until the combination of the Director's retirement and a global pandemic led to MESI's ending in permanent hiatus. Content includes grounding in the evaluator education literature, a history and detailed description of the Institute, the logic on which it was built, and criteria and indicators for its success. The author discusses the positives and negatives of the experience and provides a Top Ten list of recommendations for others considering creating a similar structure.

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