
Conclusions on the Way Forward for Evaluation in Difficult Times

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Background: The evaluation profession faces unprecedented challenges in an era of global uncertainty, with shifting political climates, rising populism, and complex societal problems requiring innovative evaluation approaches. Moments like these are opportune times to harvest learnings from the past to inform current and future evaluation practice.

Purpose: This concluding chapter reflects on Ray Rist's career and the broader implications of INTEVAL's work for the future of evaluation in uncertain times, highlighting key characteristics that can guide evaluators navigating contemporary challenges.

Setting: The article examines Ray Rist's influence across academic, governmental, and international institutions, including his work with INTEVAL, the General Accounting Office, the World Bank, IPDET, and IDEAS.

Intervention: Not applicable.

Keywords: *Ray Rist; INTEVAL; evaluation profession; global uncertainty; professional development; institutionalization; collaboration; evaluation capacity development*

Research Design: Not applicable.

Data Collection and Analysis: Not applicable.

Findings: Four key characteristics define Ray Rist's approach. These characteristics guided his approach to INTEVAL over the past 40 years and remain relevant for evaluators today: (1) commitment to continuous professional development (both personal and organizational) and lifelong learning; (2) dedication to addressing injustice through evaluation and audit; (3) focus on institutionalizing evaluation capacity globally, particularly in the Global South; and (4) emphasis on open collaboration and inclusive discussion. These characteristics have enabled INTEVAL to remain relevant despite changing times and can guide evaluators facing current global challenges, including climate change, migration, and increasing populism.

While the contributions in this special edition provide an excellent overview of the achievements of Ray Rist and of INTEVAL, it is also clear that the times are changing. Ray emerged as a professional in the arena of social justice: writing about education in underserved communities (at the time identified as ghetto communities), about those who've been marginalized and discriminated against, and about what could be done to improve equity. His road would bring him from academia to the General Accounting Office, where he initiated evaluations based on accountability principles, and it was at this time that INTEVAL took shape. It was to be expected that social concerns about policies, about international relations, and about development efforts would inspire Ray and INTEVAL.

The articles in this special edition chronicle the many contributions that Ray has made to linking evaluation theory to practice across the diverse phases of his career, from academia to the public sector and from the local to the global level. Each phase of his career offers broader insights into Ray's lasting legacy in shaping the evolving role of evaluation in the fields of public policy and international development.

These articles speak for themselves. In this concluding paper we will reflect on them in general, rather than going through each one. INTEVAL and the evaluation profession have evolved substantially over the course of Ray's career and will continue to do so in the future. Rapid shifts in the current international political climate and the recent rise of populist movements across the globe suggest that we are entering an era of greater uncertainty, where the previous formal and informal rules that dictated global order for our recent history may no longer apply. How will the field of evaluation respond to these rapid shifts?

When the path forward feels less certain and no longer clear, it is an opportune moment to take stock and harvest lessons from the past about what we want to take forward in the future, through a process of gathering, discussing, reformulating, proposing, and identifying what can and should be done. In this situation we need thinkers on evaluation with clear heads and with purpose in their approaches and justice in their minds. As this special edition shows, INTEVAL has often stepped up to the plate in great moments of uncertainty and societal change—most recently with a book about the evaluation response during the COVID-19 epidemic (Eliadis, 2024), which discussed what went wrong and where evaluation could have helped to improve the fight against the epidemic. Ray Rist co-edited that volume and wrote the last

chapter. To some extent the volume expressed INTEVAL's ambitions in the sight of worsening circumstances; its introduction contains the sentence, "The demand for discrete studies based on simple attribution models declined, while a move towards broader knowledge streams, more capable of responding to current crises, accelerated" (p. 1). This is further confirmation of the move in evaluation toward streams of evidence, as discussed in Part 2 of this special edition. That we are in a rapidly changing situation is quite clear and illustrates the urgent need to move from studies to streams (Stame & Rist, 2006) rather than that we fall back on single studies.

One could argue that if the world continues to move toward a phase of global reordering, which it increasingly appears to be doing, an alert and thinking evaluation profession, independent where possible, would benefit most from Ray's and INTEVAL's example of continuing to develop the profession and pointing it in the right direction. This leads to a short summary of the main characteristics of Ray's approach during his career, which could be instructive to evaluators as we continue to navigate an uncertain future.

The first point is that *éducation permanente* is the rule: the continuation of learning through life and professional work. A short master's study may lead one to become a competent professional evaluator. Competent that degree recipient may be, but relevance is earned by going beyond academic study through continuous professional development, taking up new methodologies, context analysis, broadening the scope of evaluations, and making one's work relevant for societal issues and the sustainable balance between the social, economic, and environmental domains. Ray has continued to work on improving his mastery of how evaluations should be carried out, how they should be positioned. Particularly through his work at the GAO and the World Bank, Ray also brought an understanding that to be relevant, evaluators must continuously learn how to interact with and support policy makers. In INTEVAL he surrounded himself with professionals who were adamant in exploring the frontiers of the profession. This willingness to contribute to an ever-growing profession, reflected in the personal development of evaluators and in the organizational and institutional development of evaluation, was key for Ray himself and for the people he interacted with in INTEVAL. It is this **further development of the profession**, both personal and organizational, that is the first key point in Ray's career.

A second key point is to be found in fighting **injustice**. Ray studied social injustice in his early

academic career, and he later moved over to evaluation and audit because he wanted to contribute more directly to tackling injustice and ensuring that policies were beneficial. Development of the profession was not a value-free option, but the INTEVAL focus was and is on the value of evaluation and audit in societies and in removing injustices. When environmental injustice became recognized, more colleagues with a background in the nexus of development and environment became members of INTEVAL; the group shifted along with the times. And there is no doubt that INTEVAL will continue with this, as the times and the crises of war and conflict, international migration, climate change, biodiversity loss, and ecosystem degradation are upon us, along with increasing populism, and pose challenges for evaluation and audit.

A **third point** lies in the **institutionalization** or incorporation of evaluation, audit, and accountability in bringing forward the first two points above (around continuous education and professional development) throughout the world. Two initiatives came about through Ray's strong involvement: First Ray, together with Linda Mora Imas, developed the concept of IPDET and leveraged an enormous amount of his methodological know-how—and the richness of discussions in INTEVAL—to ensure that IPDET would succeed. And succeed it did. It may be the best example of the global institutionalization of evaluation capacity building: a flagship global training program that significantly contributed to evaluation capacity development in low- and middle-income countries, as well as in the developed world. Through its comprehensive curriculum, strong brand reputation, and community-building approach, IPDET has trained thousands of participants from over 80 countries since its inception in 2001.

A second institution that Ray was involved in from the beginning was IDEAS, which he helped set up in 2002 in Beijing. This association was the first to provide a global home for all evaluators, as well as providing the opportunity for evaluators from the Global South to present their work in international conferences and to write chapters in the books based on these conferences. With his increasing network of evaluators all over the world through IPDET, Ray entered the global election for IDEAS president in 2008 and was elected with an overwhelming majority. He organized three global conferences (in Johannesburg in 2009, Amman in 2011, and Barbados in 2013) that were very well

attended and led to three publications, co-edited by Ray (see Rist, 2011, 2013, and 2016).

Perhaps even more importantly, Ray offered his advisory services to many governments in the Global South who were working on setting up their national systems on monitoring, evaluation, and audit. INTEVAL supported these efforts with many books on issues relevant for these institutional efforts. However, perhaps his greatest achievements in institutionalizing evaluation capacity might be best captured by the multiple ways that he has influenced the careers of so many young and emerging evaluators, many of whom have reflected on this within their articles in this special edition.

The **fourth and last point** is no doubt the emphasis on **open collaboration**. INTEVAL has never been an ideological group focused on pressing through an agenda. Everything was always open for discussion under Ray. More than anything else, Ray was convinced that going forward was served best by open discussion, collegial interaction, friendship, laughter, and just plain looking for ways forward that would be new, innovative, and in service of the role of evaluation and audit in a changing world. As mentioned before, INTEVAL is a group of volunteers, chaired by a volunteer. Perhaps the unique contribution of Ray has been the way he has fulfilled his chairperson position: always kind, always understanding, always willing to offer a chance to new insights that were at first sight outlandish, and managing the group so that everybody felt recognized and happy to be included. At the same time, he could be firm when required, particularly in insisting that participants must produce good quality contributions to publications, which lies at the core of INTEVAL's work.

All in all, these points need to be taken together to get the full view of INTEVAL: a group of volunteers willing to contribute to the profession, led by somebody who had many ways at his disposal to stimulate the discussion, working toward an emerging possibility for a new book, while still keeping the relevance of the subjects and the issues to be discussed as a high priority in each and every publication.

On two issues within INTEVAL, Ray was probably less successful than he wanted to be, compared to in his wider career. First is the participation of INTEVAL members from the Global South. INTEVAL as voluntary group did not provide bursaries or travel money for its members. This amounted to a barrier to participation by people from the Global South. Recently, the group has had increased participation from the Global South, but no doubt Ray would have wanted to see

this much earlier. A second issue is the process of involving young evaluators. Again, the voluntary nature of INTEVAL made it difficult to include young professionals, as they tend to be too busy with their jobs, with building their careers, and not yet earning salaries that would enable them to participate. Yet the number of young evaluators in INTEVAL has been on the rise as well.

Despite all of this, Ray is not a pessimist nor an optimist but a consummate realist. Perhaps **realism on what can and should be achieved** is the last and fifth element for Ray's approach in continuous professional development, in tackling injustice, in institutionalizing those approaches, all through open and inclusive collaboration guided by realism.

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