



COPE: Procedure for Preliminary Evaluation Planning¹

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Priority One

Priority Two

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|---|---|
| C | Altered Goals
CHANGE
Altered Procedures |
| O | Of Operations
OBSERVATION
Of Outcomes |
| P | Means (Programs, Activities)
PROCEDURES
Consistency with Ends |
| E | Goals and Standards
ENDS
Accomplishments |

Notes on COPE

COPE represents the four vital elements of preliminary planning for evaluation. If any of these four elements is overlooked the evaluation will be ineffective or it will fail toward effective improvement in the enterprise. Each of the four key words refers to the enterprise or organization, i.e., *change* in the enterprise, *observation* of the enterprise, *procedures* used in the enterprise, and *ends* of the enterprise.

CHANGE (Anticipating and accommodating improvement): Although it is popular to plan an evaluation “to see if change is needed,” we find that the commitment to change must come first. Evaluation will rarely change anyone’s mind. If there is a predisposition to hold and defend the *status quo* it will outlive the clearest data to the contrary. Altered goals or altered procedures should be considered in detail before it can be decided what data are worth gathering. If data are gathered regarding some “sacred issue” it will be wasted effort.

OBSERVATIONS (Data gathering): Note that COPE is not a linear model! Consideration of potentially needed changes can suggest what observations and data gathering can be useful; but similarly, an early consideration of procedures and ends can also provide useful guidance on the observations that are needed. In any case, observations that include fresh, up-to-date examination of operations and/or outcomes provides the core of the evaluation. It is particularly useful to compare

¹ Ted Ward. COPE: Procedures for Preliminary Evaluation Planning. Unpublished document, Michigan State University, 1975

observed procedures with intended (planned) procedures and observed outcomes with intended or claimed outcomes.

PROCEDURES (What is going on): Sometimes an organization is most sensitive to issues concerning its procedures. This is especially true of service organizations where procedures may be perpetually maintained regardless of their effectiveness. Focusing on the *means* requires a reflection on the *ends* that the means intend to serve. The specific matter of consistency, especially in the sense of symmetry or consistency of the means as a model of the output or ends to be served, is an often neglected matter. For example, many persons are being trained to be humane leaders in inhumane training programs; yet we know the power of the modeling effect and can expect that the ends will be less well served because of inconsistent means.

ENDS (What is coming out): Comparing goals, sometimes called standards or intended output, with the actual output or accomplishments of an enterprise is the mother of all classical evaluations. The major weakness, and it is a fatal weakness in most cases, is that comparing intended and actual outputs tells very little about what should be done and even less about what can be done to reduce the discrepancies. Ends must be considered in the context of means, and with much concern for substantial, scientific observations.

Using the COPE procedure. No two consultants will do things alike, but there are two general approaches that can be recommended as alternative starting procedures. In the first, the consultant explains each of the four sectors and then asks the client group for local examples of each. He or she then asks the clients to write (individually) cue words that represent their concerns and ideas, reflecting the first and second priority matters. Individuals can be paired or grouped in fours as soon as they are ready to share.

In the other recommended start-up approach the consultant explains each of the sectors, emphasizes the two major categories in each. He or she puts emphasis then on how any of the factors could be a starting point—starting from a point of major concern or of major potentiality. Using a chart blow-up or a projection, the consultant draws an up-and-down line as if graphing or describing a map from point to point, ever moving toward the right. Then individuals or small groups do the same, only *not* hypothetically. Their “maps” should become charts of the relatedness of factors or concerns for an evaluation and change program. Then individuals or small groups share their maps with the whole group, telling the logic of the point-to-point sequences that are shown. It should not be expected that the actual evaluation plan would be based in detail on any one of these preliminary sketches, but the discussion that this initial experience produces is often suggestive of what is needed and what is apt to be acceptable to the particular organization. A recording of the discussion will provide the consultant valuable material to use in subsequent development of the evaluative procedures.