Case study of an evaluation coaching model: Exploring the role of the evaluator

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A B S T R A C T

This study examined the role of the external evaluator as a coach. More specifically, using an evaluative inquiry framework (Preskill & Torres, 1999a; Preskill & Torres, 1999b), it explored the types of coaching that an evaluator employed to promote individual, team and organizational learning. The study demonstrated that evaluation coaching provided a viable means for an organization with a limited budget to conduct evaluations through support of a coach. It also demonstrated how the coaching processes supported the development of evaluation capacity within the organization. By examining coaching models outside of the field of evaluation, this study identified two forms of coaching — results coaching and developmental coaching — that promoted evaluation capacity building and have not been previously discussed in the evaluation literature.

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1. Introduction

Many recent approaches to evaluation tend to define themselves, not so much as previous theories did, by methodology and evaluation purpose…instead, many contemporary approaches, define themselves primarily in terms of the relationship of the evaluator (and evaluation) to others" (Mark, 2002, p. 22). This study explored the role of evaluator as coach. Adapting a definition of coaching from project management (Berg & Karlsen, 2007), we defined evaluation coaching as the process of challenging and supporting a person or a team to develop ways of thinking, ways of being and ways of learning about evaluation, to achieve personal and organizational goals regarding evaluation practice.

The evaluation coach is commonly mentioned in evaluation approaches that emphasize evaluation capacity building (ECB) (e.g., Fetterman, 2001; Preskill & Torres, 1999a). Integrating multiple definitions of ECB, Labin, Duffy, Meyers, Wandersman, and Lesesne (2012) defined ECB as "an intentional process to increase individual motivation, knowledge, and skills, and to enhance a group or organization's ability to conduct or use evaluation" (p. 308). Based on a meta-synthesis of research on ECB,

they described existing empirical literature as "emergent" (p. 324) and in need of "growth and refinement" (p. 329). Preskill (2014) also identified four challenges to supporting ECB efforts in practice, including the lack of evaluation of EBC efforts. In general, the field of evaluation has developed numerous prescriptive models (see Alkin, 2004), such as ECB, and limited empirical research has explored the ramifications and impact of these models. This study provides empirical evidence of ECB through in-depth interviewing, focusing on a model of evaluation coaching and its impact on a non-profit organization.

In her Presidential speech, Preskill (2008) described a "social epidemic of evaluation" (p. 129) meaning that evaluation is becoming widespread and commonplace. Non-profit organizations receive operating funds from government funding and private foundations, which typically require the reporting of performance metrics in relation to programme implementation and outcomes. Non-profit organizations often perceive their funding as dependent on their achievement on performance measures. Non-profit directors must provide evidence of meeting programmatic outputs and outcomes. Small non-profits might fund a single year-long programme with several different grants, each with its own outcome and output requirements. In such instances, service programmes might not have any funds allocated to report on the several requirements of how well they achieved outputs and outcomes.

The external evaluator who independently conducts an evaluation might not be the appropriate role to fulfil these

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demands of evaluation, given the cost. This case study empirically explored how the role of an evaluation coach might support these changing demands of evaluation in society. This case study described the processes of an evaluation coaching model at the education department of the National Museum of Mexican Art, a Chicago-based arts-focused, cultural organization. The evaluation coach (Tania Rempert, third author) approached the remaining authors about studying this case as a means to reflect on her own practice as an evaluator, and to better understand the impact and processes of evaluation coaching because other organizations were approaching her to expand the model. The research questions included: (1) what is the nature of an evaluation coaching model within a non-profit organization and (2) what type of coaching did an evaluation coach provide?

2. Literature review

To inform our understanding of evaluation coaching, we reviewed three areas of prior research and theory. First, we considered evaluation theory literature on the role of the evaluator, which demonstrates ambiguity regarding the role of the evaluator as coach. Next, we considered empirical research on ECB and the use of coaching as a strategy for achieving ECB. Finally, we considered literature from other disciplines and fields on various models of coaching to provide clarity on the role of evaluator as coach, and to articulate further coaching as a strategy to support ECB.

2.1. Roles of an evaluator

Orth, Wilkinson, and Benfari (1987) made a clear distinction between an evaluator and a coach. An evaluator judges performances based on agreed outcomes and expectations while a coach helps employees to learn, develop and implement new knowledge to the best of their abilities. Similarly, Mark (2002) characterized the traditional role of the evaluator as a distant judge, and argued metaphors for the evaluators' role have been shifting to emphasizing close relationships, such as a coach. Despite the shift away from defining an evaluator as a judge, evaluator roles based on metaphors, such as coaching, have limited value due to their ambiguity.

Metaphors for the evaluators' role that imply a close relationship between the evaluator and the evaluands, such as a coach, have been more closely aligned with evaluation theorists that emphasize use and utilization. For example, in *Empowerment Evaluation*, Fetterman (2001) proclaimed his hope that evaluation would be an integral part of programme planning and management, that data would be used routinely to inform decisions, and that most evaluators would serve as "coaches" facilitating evaluation work. He envisioned that, in the future, evaluators would take on a whole host of issues at a much higher level serving to mentor and work with organizations through challenges instead of solving problems for them. In *Developmental Evaluation*, Patton (2010) suggested that evaluation practice must extend beyond summative and formative purposes, and become involved in developing programmes. He described the evaluator as a vested member of the development team who brings evaluation skills and knowledge to facilitate learning that will allow the team to reach its vision and goals.

Also, Preskill and Torres (1999a) viewed the role of the evaluator as a promoter of organizational learning. They described the roles for the evaluator as "collaborator, facilitator, interpreter, mediator, coach, and educator of learning and change processes" (p.186). Their approach identified two main responsibilities of the evaluator, assisting stakeholders in examining products, services, organization processes and systems to determine where the organization's strengths and weakness reside; and promoting a culture of inquiry to foster continuous improvement and learning. The evaluator accomplishes these responsibilities by engaging the stakeholders in learning processes, which are at the centre of their model in Fig. 1, (i.e. engaging in dialogue and asking questions to promote reflection that assists stakeholders in clarifying beliefs, values and knowledge), and role modelling evaluative practices. An "evaluation coach" ought to be willing to work intimately with individuals within an organization, modelling constant feedback to maximize personal growth and mastery. Further, they have the power to influence the mental models of stakeholders housed within the organizations (Owen & Lambert, 1995).

2.2. Research on evaluation capacity building

Stockdill, Baizerman, and Compton (2002) advocate for organizational ECB as an effective means for intentionally sustaining evaluation practices and routines in a context-dependent manner. Frequently, organizational evaluation activities are not done by external evaluators (Carman, 2007), demonstrating the need to understand ECB processes and practice so that organizations can effectively evaluate and report on their programming. Baizerman, Compton, and Stockdill (2002a) inspected four case studies of ECB work (Compton, Glover-Kudon, Smith, & Avery, 2002; King, 2002; Mackay, 2002; Milstein, Chapel, Wetterhall, & Cotton, 2002) across different settings to look at common themes and practices of successful ECB implementation. They concluded that all ECB practice is highly contextual and site dependent and called for a more detailed, thick description of ECB practices to better understand practitioner roles, everyday ECB activities and explicit descriptions of ECB complexities. Baizerman, Compton, and Stockdill (2002b) then advocated for ECB practice and study to begin the task of mapping out the field of ECB to look at outcomes and best practices.

Heeding this call, Labin et al. (2012) adapted Preskill and Boyle (2008) multidisciplinary model of ECB to frame their research synthesis on the needs for, activities of, and outcomes of ECB. They identified 61 empirical studies on ECB from 1998 to 2008. They coded them for a variety of characteristics in these three areas. Almost all of the studies (97%) identified at least one type of strategy utilized to promote ECB, which the researchers classified as training (77%); technical assistance, coaching and/or support (62%); and involvement in doing evaluation (67%). As an activity or strategy of ECB, this synthesis did not differentiate the role of coaching from other similar strategies. Almost all of the studies (92%) reported an individual-level outcome for ECB with the most frequent being changes in behaviour and skills (80%), knowledge (50%), and attitudes (36%). Examples of knowledge and behavioural outcomes involved understanding and doing logic models, evaluation plans, and steps of carrying out an evaluation. Although training was associated with the high level of knowledge outcomes, a combination of all three strategies was associated with high levels of knowledge and behavioural outcomes. Given the limited research on attitudinal outcomes, the authors could not draw conclusions on the relationships between the strategies and attitudinal outcomes, although negative attitudes toward evaluation were commonly identified as a barrier to ECB. Seventy-seven percent of the studies also reported organizational-level outcomes, such as processes, policies, and practices (72%), leadership (13%), organizational culture (28%), mainstreaming evaluation (54%), and resources (46%). This study demonstrated that the individual outcomes of attitudes and behaviours were more frequent when ECB strategies also addressed organizational outcomes. Overall, this study emphasized the importance of collaborative evaluation approaches for doing ECB.
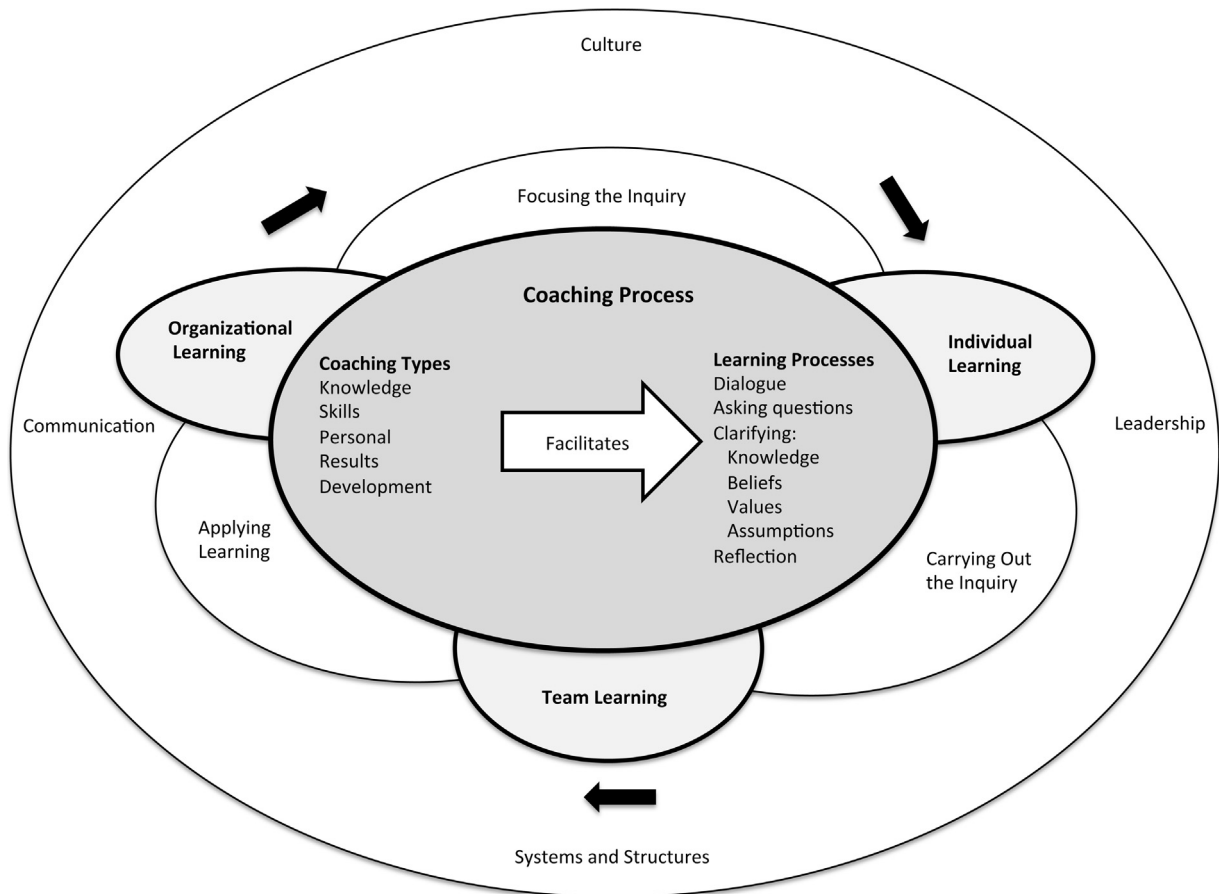
Fig. 1. Coaching process within an evaluative inquiry framework. Adapted from Preskill and Torres (1999b). Note learning processes are associated with types of coaching in [] within text.

2.3. Coaching

Literature on ECB provided some articulation of the role of the evaluator as a coach, but did not describe specific forms or types of coaching. We explored a variety of models for coaching (Berg & Karlsen, 2007; Carey, Philippon, & Cummings, 2011; Gregory, Levy, & Jeffers, 2008; Griffiths & Campbell, 2009; Ives, 2008; Law, 2013; Marsh, 1992; Passmore, 2007). The majority of these models focused on the actions of the coach (e.g., reflecting, relationship building, problem solving, feedback, dialogue, tutoring) rather than on what the impact of this coaching might be. Carey et al. (2011) conducted a review of coaching models and found that the key elements included relationship building, problem definition and goal setting, problem solving, transformation process, and outcomes. Griffiths and Campbell (2009) asserted that the process of learning is iterative, and combines the four key coaching processes of relating, questioning, reflecting, and listening. Gregory et al. (2008) proposed a feedback model in executive coaching detailing the role and process by which feedback can enhance the coaching processes. Coaching Psychology – grounded in psychology theories in particular learning and development theories – focuses on empowering individuals to take action to improve performance to achieve optimal functioning in their work and personal lives. In this framework the practice of coaching is a shared experience between coach and coachee that emphasizes the following process: learning, reflecting, increasing emotional awareness, dialogue, feedback and self-evaluation (Law, 2013). Marsh (1992) created six dimensions of effective coaching: (1) being open to ideas and enabling learning through autonomy, (2) creating a supportive atmosphere, (3)

providing feedback, praise and constructive criticism, (4) showing personal interest and engagement, (5) setting clear goals and follow up outcomes, and (6) being prepared for meetings and professional development activities.

In contrast, other models emphasized the impact on the coachee. First, Ives (2008) examined various underlying approaches to coaching and narrowed the range to two main types: personal-development and goal-oriented coaching. Personal-development coaching emphasized the therapeutic role of the coach to foster the personal and emotional growth and self-awareness of the coachee, while goal-oriented coaching emphasized a solutions-oriented role of the coach to foster self-regulation through action plan development to achieve specific goals. Also, Passmore (2007) described an integrative model of coaching for personal development, where the coach worked in four "streams" to affect change in the coachee. The streams included behaviours of the coachee, the thoughts and perceptions that promoted these behaviours, the emotional and motivational foundations for these behaviours, and the cultural and contextual settings that influenced these behaviours.

Berg and Karlsen (2007) described five types of coaching for project management, which incorporates Ives (2008) personal-development and goal-oriented coaching. We chose this framework because it defines the activities of a coach in relation to the coachee and the practice of project management overlaps with evaluation. This framework also reflects outcomes identified in theory and research on ECB, including outcomes related to knowledge, skills or behaviour objectives and attitudes or affective (Labin et al., 2012; Preskill and Boyle, 2008).

- *Knowledge coaching* provides the coachee with content knowledge and skills in a specific area. Content could be on specific field knowledge needed to carry out a project or more soft-skills knowledge to manage a project. In evaluation this might involve instruction on evaluation, such as the difference between formative and summative evaluation, use of logic models, and the different purposes of various data collection activities.
- *Skills coaching* focuses on getting the coachee to adopt new ways of acting to increase the results of the project. In evaluation this might mean adopting evaluation methods, constructing logic models of their programmes, changing data collecting practices, and engaging in activities to utilize evaluation findings.
- *Personal coaching* helps the coachee find solutions to concrete personal challenges, focuses on attitudes, feelings, perceptions, and self-efficacy. In evaluation this might include changing perceptions of what evaluation is and is not, and how it can be beneficial, as well as empowering the coachee to take on new evaluation activities and tasks.

Two outcomes in this framework (Berg & Karlsen, 2007) have not been identified in prior literature on the outcomes of ECB.

- *Results coaching* focuses on helping the individual or team complete milestones, and reach specific goals. In evaluation this might be guidance during phases of doing an evaluation (e.g., planning, data collection, data analysis, data reporting), and providing assistance when necessary to complete the evaluation.
- *Development coaching* focuses on career coaching, and helping the individual or the team acquire more responsibility and tasks. It also includes changing the organization to make it more project-oriented, willing to learn, and flexible. In evaluation, this might mean helping coachees redefine their job responsibilities to include evaluation, building evaluation capacity within the organization, and promoting autonomous use of evaluation practices by stakeholders.

In this study, we utilized this framework of five types of coaching to understand evaluation coaching and to examine the impact coaching had on the stakeholders.

3. Methods

3.1. Case study methodology

We utilized case study research methodology (Mabry, 2008) to understand empirically an organization and its evaluation coach. A case study provides "deep understanding of particular instances of phenomena" (p. 214). Although case studies might be conducted from a variety of research approaches (Byrne & Ragin, 2009), in this study we utilized an interpretive approach that described human perception and experiences with evaluation coaching, because we wanted to understand how an organization and evaluator experienced evaluation coaching. Law (2013) provided a framework for evaluating the process and outcomes of coaching. For process evaluation, which is most aligned with the aims of this study, he recommended utilizing retrospective case studies to collect success stories via qualitative evidence. This approach is consistent with a strength of case study methodology to understand extreme cases (Mabry, 2008). Given this approach to sample selection, case study does not provide generalizations from a sample to a population, but they can provide analytic and naturalistic generalizations. Analytic generalizations are from the case to theory (Firestone, 1993; Yin, 2009), such as theories on ECB, which are currently under development within the field. Given rich, thick description of a case, readers of the case might also make

naturalistic generalizations from the case to their circumstances (Firestone, 1993; Stake, 1995). Such naturalistic generalizations facilitate case-based learning among practitioners (Flyvbjerg, 2006), which is particularly appropriate for the field of evaluation.

3.2. Case selection: Education department at the National Museum of Mexican art

For over 25 years, the National Museum of Mexican Art has adopted a holistic approach to arts education by devoting nearly one-fourth of their annual operating budget and one-third of their full-time staff to education. The organization embraces the notion of education as a principle means to communicate art and culture to the community. The education department employed 10 artists – some of whom have Bachelors or Masters degree in Education – who provided cultural-based programming to the community with a department director who oversees the administrative and professional development functions of the department to support the artists in their work. The general philosophy of service is twofold: exposure to the arts engages the use of multiple intelligences, and art is a conduit to transfer values of emic and etic culture to participants of all ages, ethnicities, and backgrounds.

During the year that this case study was being conducted, the education department provided an Artist in Residency Program in 35 public schools. They hosted over 2000 K-12 classrooms in an educational guided-tour of current exhibits. The education department also promoted youth development for over 400 teenagers between the ages of 14–21 in afterschool arts and media programmes. Additionally, the education department provided workshops that targeted adults such as teachers and parents, with the goal that these adults would be able to go into the community and provide arts education to those who did not come to the organization. Finally, the organization also presented multiple performing arts showcases throughout the city to showcase the talents of diverse performing artists from across the US and other countries.

The education department first engaged in programme evaluation of their efforts in 2005 when they received a large state grant with money put aside for external evaluation. At that time, the programme administrators had never heard of a logic model (W.K. Kellogg Foundation, 2004), but with the help of their external evaluator, found the process of developing a logic model to be useful in strengthening their programmatic theory and streamlining their daily activities. They also had never used a database to enter in participant information or questionnaire data, because all of the data they collected was qualitative and only used to inform their daily decision making anecdotally. The use of questionnaires to improve their programme was unproductive. They had stacks of banker's boxes piled in corners and under desks full of one- or two-page short-answer questionnaires that the programme personnel used to collect satisfaction data. Staff members were not educated in the processes of evaluation and the questionnaires were not used in a systematic manner.

Prior to working with the evaluation coach, none of them had worked with an evaluator, except for the Education Director. One even quipped during their first large-group meeting. "I didn't know there were people who did that!" The Education Director was initially the driving force of pursuing the evaluation coaching. She had experienced the benefits of the evaluation process previously. The Education Director was able to sustain evaluation activities and produce this change in process toward sustainable internal evaluation, because she was the supervisor of the other nine staff members. Her influence over budget allocations allowed a long-term investment in this process of ECB. Although there was annual and ongoing informal formative evaluation throughout the evaluation coaching, there was no formal evaluation of the evaluation coaching during its implementation. This case study

served as a meta-evaluation offering formal summative critiques of the evaluation coaching process.

3.3. Case context: Shifting from external evaluation model to coaching evaluation model.

Over the next three years of participating in the external evaluation of their state funded programme, the department learned the utility of evaluation for that particular programme and wanted their other programmes to benefit from an evaluation in the same way. After the completion of the 3-year grant that funded an external evaluator, they pooled their limited monetary resources and continued funding the external evaluator to provide guidance on how to evaluate the rest of their programmes. Thus, a new evaluation coaching model was born based on the organization's limited budget. The evaluator moved from the role of external evaluator to the role of evaluation coach. Her role as the external evaluator was to provide all of the tools and database development, data collection, data entry, data analysis, and reporting with the funds provided using her own external staff. As an evaluation coach, her role was to help the staff members develop collaboratively the skills and knowledge, using the evaluation funds to pay for her time teaching the programme staff how to conduct these processes internally with her guidance and assistance. Examples of skills and knowledge included developing their own logic models, tools, and databases, and supporting them to conduct their own data analysis and reporting. This model of coaching was derived organically from a shoestring evaluation mindset (Bamberger, Rugh, Church, & Fort, 2004), because staff members needed to learn to do evaluation themselves. The 10 FTE Education Department had approximately 15 individual educational programmes underway at any one time, with an annual department budget of less than $500,000. Only two of these programmes had dedicated funds for evaluation, with the sum total of $10,000–$15,000 being allocated to evaluation annually. This amount was not enough to support an internal evaluator. It was enough to have an external evaluator conduct a small evaluation of one of their promising programmes, but rather than using an external evaluation model, the education department and evaluator developed the model of evaluation coaching to support evaluation activities internally for 15 programmes. The coaching model assumed that the evaluator did not complete the evaluation work for the museum staff members, rather the evaluation coach modelled and assisted. This coaching model emphasized the role of the evaluation coach to develop individuals' knowledge, skills, and attitudes about evaluation (Preskill & Boyle, 2008), but the initial intent was not to develop sustainable evaluation practice or evaluation capacity at the organizational level.

To implement the coaching model within the museum's education department, an evaluation coach spent one day a month on-site, providing professional development in large groups for the department's staff and additional one-on-one days with personnel from each programme. During these times, the evaluation coach taught and provided educational resources for the staff on general evaluation topics such as logic models, evaluator roles, purposes of evaluation, data collection methods, and so on. The goal of these sessions was for the coach to be open to answer any questions or concerns that staff members might have while serving as a guide for feedback, criticism, and praise for the department's evaluation processes and inquiries. During the workshops, the coach provided technical assistance in skill and knowledge development, focusing on models of internal evaluation (e.g., CDC Evaluation Framework, Kellog Model, UNICEF, Getting to Outcomes Framework, Conditions of Collective Impact). Rather than theory and definitions, the coach focused on understandings and practical applications.

The programme staff identified the issues of importance to them in need of coaching based on the next step necessary to carry out the evaluation process. For example, at the beginning of the coaching process, some staff members were unfamiliar with evaluation or the evaluation cycle. In these instances, the evaluation coach provided baseline information to build the knowledge base of the programme staff member. After this initial step, the evaluator introduced the concept of developing a logic model. Some staff need the evaluation coach to help them turn their narratives of programme theory into succinct concepts that logically connected, where as others were easily able to construct the model on their own. The next steps of evaluation coaching quite naturally followed the cycle of evaluation. Programme staff met with the evaluator and received support on whatever stage of the evaluation process on which they were currently working. The ongoing support and individual coaching continued throughout the cycle and repeated again during the next evaluation cycle, with staff gradually relying less on the coach.

This dynamic of supporting staff to do their own internal evaluation could at times be difficult as there were not enough funds available for the evaluator to take on evaluation tasks by herself when a staff member became frustrated or overwhelmed with other work. In situations such as this, the evaluation coach often relied on knowledge and skills outside of conducting evaluation to maintain the relationship with staff. The evaluators' previous training and experience as a social worker supported her ability to develop rapport with the programme staff and work through time periods of intense deadlines. She understood that some of the programme staff required more of a laid back approach without too much pushing for change too quickly, allowing the staff member to do for themselves and ask for support. She also understood that some of the other programme staff required active encouragement, lots of e-mails and phone communication. She would often buy the department morning snacks or lunch, planning for this show of hospitality to buy her some good will in terms of their cooperation and completion of agreed upon tasks. By working with each programme staff member individually and at their own pace, the evaluation coach developed relationships with each of them over time, communicating often, and following through on her promises of support to avoid trust issues. It was through a spirit of generosity with time, understanding, and patience that the evaluation capacity of the programme staff was built over the course of five years.

3.4. Data collection and analysis

To become familiar with the coaching model, we reviewed materials the evaluation coach utilized in the professional development. To become familiar with the NMMA department of education, we reviewed evaluation products that they developed (e.g., evaluation plans, data collection tools, and evaluation reports) and informally observed daily activities in the department. Based on this background information, the research team conducted individual semi-structured interviews with ten staff members of the department and the evaluation coach. These interviews took place in 2012 after the evaluation coach had been working with the NMMA department of education for almost five years. The interview questions aimed to understand the role of the evaluation coach, the individual and organizational uses of evaluation within the department, and the future of evaluation practices within the organization. Although observation is a common data collection tool in case study, given that this was a retrospective case study, we were not able to observe the coaching in process, which did present a limitation to the study that we revisit in the discussion.

We used a hermeneutical approach (Kvale & Brinkmann, 2009) to interpret the interviews. This approach does not have a step-by-step method, but rather guiding principles for the analysis process. The most central characteristic is the hermeneutical circle, which refers to a back and forth between parts and the whole. For example, we consider the interpretation of an interview quote in relation to the whole interview. We also interpreted one interview transcript in relation to all of the interview transcripts. After transcribing the interviews, research team members read through the transcripts multiple times, engaging in self-understanding (i.e., formulating what the subjects themselves meant) and critical commonsense understanding (i.e., going beyond the participant's meaning to be critical of what was said and consider the context in which it was said, which involved asking questions). We routinely met to discuss these interpretations.

At this point the research team revisited the literature and identified the Preskill and Torres (1999a,1999b), model and the Berg and Karlsen (2007) framework, which aligned with our emerging interpretations. Because we were primarily focusing on coaching, rather than ECB more broadly, we utilized Preskill and Torres (1999a,1999b) rather than Preskill and Boyle's (2008) model. Preskill and Boyle's model drew on multiple disciplines — evaluation, instructional design, learning theory, and organizational change — to provide a global view of the multifaceted components required to develop ECB within an organization. Preskill and Torres' model provided an understanding of how evaluators can assist organizations in building ECB; thus, it described the role(s) and actions an evaluator takes to build evaluation capacity. The former model provided a macro-level model; whereas, the latter model characterized a micro-level model about what an evaluator might be doing to facilitate evaluation.

We then systematically applied these theoretical frameworks to generate theoretical understanding, which went beyond self-understandings and commonsense understanding by coding the interviews based on the concepts in each of these frameworks. All emergent codes that we identified in the data analysis were represented in the models. During this process, the research team met frequently to discuss similarities and discrepancies in the coding process. Two research team members coded four out of the 12 transcripts for elements of each theoretical framework. Because the researchers had consistency in their understanding of the codes, one research team member coded the remaining interviews. Once we had completed this coding, we explored patterns within and across the two frameworks (Berg & Karlsen, 2007; Preskill & Torres, 1999a; Preskill & Torres, 1999b), moving between the parts and the whole and considering both the presence and absence of codes. We continued this process until we tested various interpretations of the text and came to an interpretation that provided unity across the data sources.

4. Results

In the first section, we utilized the Preskill and Torres (1999a,1999b), model in Fig. 1 to describe the organization's experiences with evaluation with the support from evaluation coaching. We represented the case in a narrative, intentionally weaving together the description of the case and the elements of the model. This representation allowed us to preserve the relationships between the elements and emphasize the whole case, rather than dissecting it by individual parts. To demonstrate how the elements of the model are evident in the narrative, we placed the following indicators in parentheses: organizational learning [OL], team learning [TL], individual learning [IL], focus inquiry [FI], carrying out the inquiry [CI], applying learning [AL], culture [Cu], leadership [L], systems and structures [SS], and communication [Co]. In contrast to all of the other elements, the element of communication was not evident in the evaluation coach's and staff members' interviews. In the second section, we examine the role of the evaluation coach more closely. We identified the centre circle in Fig. 1 as the coaching process where dialogue, reflection, asking questions, and identifying and clarifying values, beliefs, assumptions and knowledge were facilitated through types of coaching to promote individual, team and organizational learning.

4.1. Education department at the National Museum of Mexican Art: A case of evaluative inquiry for organizational learning

"Evaluation runs as a thread throughout everything." – Camila.[1]

The 10 staff members in the Education Department of the National Museum of Mexican Art were "comfort(able)" with one another, as many of them are friends outside of work [Cu]. They shared a desire to help students, teachers, parents, and others to develop a "deeper understanding of what Mexican cultural is instead of seeing the stereotypes that are associated with it" (Victoria), which they did by "connecting culture to art work" (John). The department wanted "students to be much more open to learning about cultures that are different from their own" (Victoria) [Cu]. The department valued evaluation, which was critical within the education department's culture [Cu]. The coaching facilitated multiple examples of individual learning and team learning about the purpose of evaluation, and specific evaluation practices such as logic modelling, developing questions, data collection and analysis and writing reports. For example, Leo explained "developing an evaluation [FI] can help us understand what we're trying to do with a grant [TL]. From the resources to the specific goals, activities that will help, and then all of the evaluation. It's a tool in order for us to observe that process" [TL]. Individual learning is further explored in a later section of this article describing the types of coaching, and its link with the learning processes in Preskill and Torres (1999a,1999b), model.

The department also desired to infuse evaluation within other departments of the museum. Both within and outside of her department, staff members respected the leadership of the Education Director [L]. She understood the value of evaluation, which staff members also internalized. Evaluation documented their accomplishments, which they shared with their development department to facilitate grant writing and acquisition [SS]. She also facilitated teamwork within her department, which staff members recognized and appreciated [Cu].

> Everyone is good at something. For example, Tomas is a good outcomes speaker. Sabastian is great at writing reports to show others. We've all become experts, and others step up and become leaders. Leo is looking long-term at programming, community engagement, and art making. He's the "go-to guy" for curriculum design. Ricardo and Daniel–they are implementing and getting things done by tracking outcomes. Ricardo needs more support in the beginning, but then he carries it through. I'm the outcomes and "big picture" person, and I help a lot with survey questions. John and Leo–they keep humor in the group and relax everybody. Sabastian keeps it real, and is pragmatic. I love it when they feel confident to disagree, and it makes us grow and reflect so much to disagree and feel okay with it. Constructive criticism and growth is key! Tomas is quiet, but adds a lot of perspective. He is always thinking, and when he speaks, he adds. Victoria has already come to with

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[1] Pseudonyms were used for all staff members of the museum when reporting results.

good understanding of evaluation. She's new, but she gets it. (Camila)

Most staff members in their interviews also discussed this teamwork. Over the five years, the evaluation coach also became integral in the organizational culture and structure [SS].

I even see our evaluation coach as part of our team–and a very important part of the team. We don't see her all the time, but she's there to move us from point to point. We see her several times a year, and she comes to meet with everyone, but she's been a tremendous help, guide, and support. There is this gradual release of responsibility that she's doing with us. We're her peers, and we're learning from her, and she's our teacher. She has pretty well-rounded relationships made up of multiple roles as well. She listens to us, too. She shares ideas with us. She revises. She takes our feedback as well. (Camila)

The leadership of the education department modelled and fostered teamwork and included the evaluation coach as a member of their team [L].

This team work facilitated the inquiry process from focusing the inquiry, to carrying out the inquiry, and then applying the learning. Within this process, the majority of staff members were proficient with the first two steps, but they were still working with the coach on utilizing their evaluation findings. For example, an educator explained "I've gone full circle. I've developed a logic model, helped create the questionnaire and post-assessment, distributed data, inputted data, and helped with final reporting" (Tomas) [FI, CI]. Staff members also described how they learned this inquiry process through the coaching model.

The first year that [the evaluation coach] was here, I didn't understand anything at all. I never understood evaluation, the vocabulary was extremely foreign - it was confusing and frustrating. It was very new, and we jumped in…slowly. The first year was very difficult. After I was able to go through my first entire process from pre- to mid- to wrap-up and report for it [FI], it's a good feeling to get the entire report done. I still need to use the handouts that [Tania] gives us to guide me, but I'm able to do it now [IL]. (Sabastian)

After five years, staff members were beginning to take ownership for reporting, which might further facilitate the application of learning. Although some staff members described the "feedback" about their programmes through evaluation, all staff members recognized the value of evaluation to justify their programmes and help secure funding.

As a result, the staff members applied what they learned through evaluation into grant writing [AL], which resulted in organizational learning. "One of the disconnections that we had with the grant writer was that they would write grants and say, "Okay, we wrote this grant. Now we can be looking for grants, and say, 'Look we have this data,' and say this is what we want. [AL] It makes our department stronger" (Daniel). The education department utilized what they learned from their evaluations to apply for grant funding that aligned with the mission of their department and strengths in their existing programming [OL].

This experience has also helped the department recognize how evaluation might be critical for the museum.

We need to make it a priority for all programs at the museum to bring everyone up to speed on evaluation. We need to increase people's comfort levels, knowledge, and awareness to make sure that each individual is competent to carry out evaluation individually. [IL] Experts within our team could be supports for everyone else. [TL] This should be a museum-wide initiative. In

the end, data is our friend. It not only helps us check what we do, it helps us to get further ahead. Without it, it's hard to prove and claim what you've done…I see us as learners, not experts all the times, but learners. We need to be open-minded to take in new ideas, to consider criticism, and to work on weaknesses. This is super important. (Camila)

In other words, the Director had a vision for the individual and team learning that occurred within the education department to occur within the entire organization [OL].

Our analysis showed that the museum staff engaged in the phases of evaluative inquiry, focusing inquiry, carrying out inquiry and applying learning represented in Torres and Preskills' model. (See Fig. 1.) Staff members worked on building logic models of their programmes, collecting data on outcomes and used the information to shape the organization's practices and activities. In addition we found evidence of three of the infrastructure components culture, leadership, and systems and structures (see Fig. 1) that supported the organizational learning that occurred. The culture of the museum centred on the staff's shared vision that they wanted their clients to deeply understand Mexican culture. The staff wanted to expand their existing evaluation practices to support this vision. The Education Director valued the use of evaluation and supported the use of an elevation coach to help staff develop their evaluation practice. Work with the evaluation coach allowed the staff to develop the systems and structures for evaluating the programmes and use the data to achieve their vision. In summary, after five years of evaluation coaching, the organizational learning of the education department was facilitating organizational learning in the museum. In this case, we see how the culture, leadership and structure of the department facilitated an evaluation culture and an inquiry cycle. This inquiry cycle facilitated individual, team and organizational learning about their programming and the evaluation process.

4.2. Learning processes

In this case, we also documented the staff members and the evaluation coach engaging in most of the learning processes present at the centre of the adapted Preskill and Torres (1999a,1999b), model (see Fig. 1). To examine these elements within the interviews, we considered how these learning processes could manifest in our specific case of evaluation coaching and used the following definitions when coding for their presence. Asking questions represented statements about the process of asking questions to help clarify understanding of evaluation or to help carry out an evaluation within the museum. Dialogue represented instances of interactions between the coach and staff, and staff and staff for the purpose of understanding evaluation knowledge, skills, or carrying out an evaluation at the museum. Clarifying knowledge reflected statements of deeper cognitive understanding of evaluation processes in general, a more agreed upon understanding of the purpose of evaluation as an activity within in the museum, or deeper understandings or more agreed upon understanding of specific evaluation activities (i.e. logic models, data collection, data analysis, reporting etc.). Clarified beliefs referred to perceptions about evaluation in general, perceptions of the role evaluation played in the museum's work and programme processes, or that evaluation is part of the participants' job responsibilities. Clarified values acknowledged statements about the role evaluation played in the museum's funding or helping the museum clarify its mission and vision as well as improve its programmes.

First, the evaluation coach taught the museum staff members important questions to ask to facilitate their evaluation processes. Examples of questions included: "Is this (evaluation) question

important?" (John) "Who needs this information?" (Izzy) "Why don't you consider this type of evaluation?" (Tomas) "How do I phrase this so that it's asked the proper way to get the information I'm looking for?" (Sabastian). In turn, staff members asked each other these questions. The structure of the department and the coaching experience seemed to facilitate asking questions. During the interviews, staff members also demonstrated how they were constantly asking questions to further their understanding and practice of evaluation. For example, a staff member posed numerous questions.

> We want to know, "What are we doing with it (data) besides giving it to development for grant purposes?" and "How do we present it to others–not just donors - people that want to realize what we're doing and how great we are?" (George)

Within the education department and based on the approach of the evaluation coach, asking questions was a central learning process that was utilized in numerous ways.

Along with asking questions, dialogue between staff and the coach and between staff members facilitated the evaluation process. During the interviews, staff members described instances of dialogue between staff and with the coach that helped to improve their evaluations.

> Sometimes we have smaller teams that report out to the entire group, but we also have a lot of informal meetings like debriefing meetings where it's looking at one question in a survey. All of this brainstorming, planning, and feedback is provided for staff working on different projects. When people are writing outcomes, they toss ideas out to team, come back together, toss them out to Tania, and revise again. (Camila)

While dialogue and asking questions were present in the interviews, the examples of these two processes were not as evident as clarifying knowledge, beliefs and values. The initial purpose of the coaching in this case was to focus on the technical knowledge and skills associated with conducting evaluations and this directly facilitated clarifying knowledge related to evaluation. The following examples indicate that coaching about specific evaluation activities allowed staff members to clarify their knowledge of evaluation within their organization. George explained "just the process of doing the logic model and doing the questions and doing the right evaluation for that logic model. The logic model is a nice way of breaking down goals and what you're trying to achieve." Ricardo also described "how important it is to have pre- and post- tests and to have the correct answers for the correct grade/age level. Also, why it is important to even collect data altogether. To keep examples of the kids' art work to show what they have accomplished." Knowledge clarification was the central learning processes in this case.

While prior research demonstrated ECB had less impact on attitudes than knowledge and skills (Labin et al., 2012), we did find that the evaluation coaching promoted clarification of beliefs and values indirectly through coaching. In other words, clarifying beliefs and values was an outcome of learning about evaluation, clarifying knowledge about evaluation, and engaging in evaluation practices rather than a learning process that facilitated the evaluations conducted by staff. Staff acquired a new perspective of evaluation and belief about using evaluation practices within the organization. Izzy explained

> [Evaluation is a] way to gauge your progress of the work you're doing and what it can be doing. It's a skill from which you can be measured. A tool that can gauge your activities and what/how much of it you're doing.

Along with clarified beliefs about evaluation, staff also clarified their values about evaluation, particularly its worth in gaining funding from external organizations and helping the museum better understand its importance in the community. Sabastian explained, "It is necessary for you to plan, follow-up, and learn from the programme that you're doing. It's necessary for your funders to know what you did with the money they gave you so they can give you money again the next time you apply."

Two of the learning processes, reflection and clarifying assumptions, were less evident in the staff interviews, due to their limited presences in the data we excluded them when presenting our results. The low occurrence of reflection could be a result of the data collection processes, as interviews were retrospective and might have failed to capture the instances when museum staff engaged in reflection. The interview with the evaluation coach did suggest that reflection was an ongoing processes of engaging in evaluation cycles, and that the staff did practice reflection by thinking about their evaluations and examining what worked or did not work. Reflection appeared more embedded in the processes of asking questions and the dialogue that resulted from the examination of evaluation cycles.

> So every time we were going through a programmatic cycle…meaning the beginning when you conceptualize a program, develop a logic model, do the literature review, develop measurement tools, collect the data, analyze the data, report the data, then go back to the program planning. As an organization and a department they went through that process several times and so I think that they just kept getting better at it because they were thinking about what didn't work last time and what seemed like too much work last time, or that last time we forgot to do that and that messed us up during the reporting cycle. Or remember that program two years ago when we had a comparison group? That worked really well, how about we do that again. So I think that they were reflective, it made it easier to be reflective because they went through the same process so many times. [Tania]

The low incident of clarified assumptions might be due the fact the most of the staff had little or no knowledge about evaluation and therefore had limited assumptions about it. However, some examples of clarification that were a reaffirmation of existing beliefs and values were evident among interviewees. For example, the evaluation coach acknowledged at multiple points in the interviews that "their beliefs that their mission was important was validated through this evaluative process." This reaffirmation could represent an aspect of clarified assumptions as Preskill and Torres (1999a,1999b), argued that the learning processes are one way in which organizational members become aware of their existing values and beliefs.

Having provided examples of the learning processes from the Preskill and Torres model (1999a, 1999b) for this case, we now turn to the role of the evaluator as a coach, given the Berg and Karlsen (2007) model. To demonstrate how the evaluation coach facilitated the learning processes thorough the types of coaching we placed the following markers in parentheses: Dialogue [D], Asking Questions [AQ], Clarified Knowledge [CK], Clarified Values [CV], Clarified Beliefs [CB]. These markers demonstrate that each type of coaching facilitated a variety of learning processes rather than certain types of coaching being related to particular learning processes. (See Fig. 1.)

4.3. The role of an evaluation coach

> My role was as the "evaluation coach." I gave myself that name and introduced my role that way during one of the very first evaluation Professional Development sessions–juxtaposing my role as "coach" differently from an internal or external evaluator. (Tania)

In this section, we utilized the Berg and Karlsen (2007) framework to describe the role of an "evaluation coach." All education department staff members and the evaluation coach described at least one instance of knowledge coaching, skills coaching, and results coaching, and only one staff member made no reference to developmental coaching. These types of coaching in the Berg and Karlsen framework represent Ives (2008) description of goal-oriented coaching. Although we describe each of these types of coaching separately, they were interrelated in practice.

Knowledge coaching strengthened the Museums staff members' understandings of evaluation and the value of engaging in evaluation. It allowed them to gain a broader perspective of the purposes of evaluation and how evaluation benefited their organization. "If anything, it's good to think about what's working and what's not working. And how do you determine that? That's the general gist of evaluation" [CB] (Victoria). Museum staff also learned how evaluation information was beneficial beyond the programme itself. "It [evaluation] gives us validity because now we have proof that teachers, students, and partners have gone through numerous programmes…it gives us proof that we are really meeting satisfactory or exemplary programming in the community and for the teachers that we serve."[CV] (Tomas) Staff members gained a broader perspective of the role evaluation played within their organizations and the usefulness of evaluating their individual programs. Knowledge coaching included the expansion of the coachee's knowledge within a specific field to facilitate the completion of the project (Berg & Karlsen, 2007).

The evaluation coached explained "As a 'coach' I also had to determine what skills they were lacking that were getting in the way of them moving forward" [CK]. Staff members identified specific evaluation activities such as developing logic models, developing evaluation questions, collecting data or assessments, and writing reports as examples of specific knowledge learned through evaluation coaching [CK]. First, staff expressed the purpose of logic models in the evaluation process. One staff member expressed how logic models helped to identify the goals of the programme.

> You start with the logic model, you go through the steps or the objectives, you see what you have to do and how you have to get there, and while it's happening, you have to assess the people of what they're learning and how it affects them [CK]. You know, once we get those results, we see what works what didn't work, what we can do better, and what we can eliminate [CV]. I think it's just organization. It took me being here for so many years until I saw that evaluation is like the organization of our department [CB]. (Daniel)

Second, for some staff the knowledge coaching helped them develop better evaluation questions. "I've been told [D] I've been asking the wrong questions…You really have to be more dry and to the point, instead of forever-ending questions. You need to be more specific. That's one thing I've learned: Being more precise" [CK] (John). Third, knowledge coaching also helped the staff members gain a better understanding of data collection [CK]. "With her coaching, I think I would definitely be able to create my own assessment whether it came from a questionnaire or focus group. I could also base it off what the programme is and what I want to come out of that" (Daniel). This staff member's response indicated both an increase in employing a variety of data collection methods, but also indicated an understanding that data collection needs to be connected to programme activities and outcomes. Finally, three staff members recognized the need for data to be made public to inform others of the museum's work.

> Data isn't useful if you don't show it to anybody. There is a purpose of the data that we're collecting. I think it's just an

important factor in today's museums and cultural education/school education that we do have some kind of data to support the kinds of programs that we have [CV & CB]…Also the reporting of evaluation was foreign to me…that I finally learned about… the importance of reporting…Sometimes you have to be in charge of that reporting. That was another thing about the evaluation process that I didn't know about [CK]. (Tom)

This suggested that staff members understood that evaluation is more than the process of carrying out data collection, but that the information generated from evaluations has value and that this value is lost when results are not made public.

Similar to knowledge coaching, examples of skills evident in the coaching process included developing evaluation questions and logic models, creating assessments and surveys, implementing procedures for data collection, managing and analyzing survey data. In contrast to knowledge coaching, *skills coaching* had minimal overlap with the learning processes. Although skills coaching included isolated examples of dialogue and clarifying knowledge and beliefs, staff members commonly referred to "working with" the coach.

> At the very least, we can design measurement tools, implement them, and it quickly informs our programming. Even if it's something that doesn't make it to our report, as staff we look at it to use it at some point. I would always want to touch base with an external expert [CK & D]. (Camila)

This process of working alongside the staff members seemed to involve extensive modelling, which involved the evaluation coach demonstrating for the staff member how to do a particular skill, and then the coach monitoring staff members as they practiced these skills. Although modelling is not an explicitly mentioned learning process, Preskill and Torres (1999a,1999b), did describe modelling as central role for evaluators in their model.

Although eight of the ten staff members provided at least one example of *personal coaching*, this type of coaching was described less frequently during interviews again suggesting that the coaching in this case focused more on technical aspects of evaluation. Staff members also gave it less importance than the other types of coaching. Examples of personal coaching did indicate instances where both beliefs and values were clarified. A staff member described an example of personal coaching,

> At the very beginning, I was like, "What is evaluation?" I'll admit I was a little apprehensive in the beginning, but I now understand that it's something that has to be done…now it's more like, "Ohhhhh, that's why we need evaluation! [CB] It's a little intimidating, also. It's intimidating to be like, "What the hell is this logic model? What am I supposed to do with this? [AQ]… But now I don't feel like I could plan anything without a pre-assessment or logic model or some sort of tool to move forward [CK]. It's a phenomenal planning tool, but it sure as hell didn't seem like that at the beginning. (Sabastian)

In addition to describing confidence in carrying out aspects of the inquiry process, staff members described gaining a better understanding of evaluation and the value of evaluation.

> …[Evaluation] has definitely changed the way I see the organization–I think it's awesome! I think it's very important and very beneficial and very useful [CB]. It's what the funders want to see. It's what we can show them [CV]. "How do we assess these kids and really show the improvement we're making? [AQ]" With the money that they give us, over time I've learned a lot about evaluation [CK]. It's very useful and beneficial for organizations in general. All organizations should

have evaluations [CB]. If I ever move on, its' something to look into: "How are you assessing your programs? (Daniel)

Through the coaching experience, this staff member shifted his perspective of evaluation and evaluation practices, and articulated the importance to using evaluation as a professional. In order to do this, the evaluation coach and staff members emphasized how meeting staff members at their place in the learning process was critical. The Director explained "They're not all comfortable, and they're not all in the same part of the process, but [Tania] meets them where they are. She helps them along, and some of them may be way past. A coach meets you where you are."

The interview with the evaluation coach provided clear example of personal coaching. She recognized that part of her coaching was to help staff adjust to the new evaluator role and meet new responsibilities. This often required addressing the emotions experienced by staff members.

I'm a trained social worker so I was able to do group dynamic stuff, and pull out people who were being quiet and ask them is this making you uncomfortable? [AQ] Because there were people who may be angry for having to do this extra work I had to be ok with saying like how does this fit in, what did you do? [AQ, CB] And sometimes they would say well I'm irritated that I had to spend so much time doing this. And at certain times then the director of the department got to hear them say that, we got to do some trouble shooting about how that would be ok [D]. It was almost like group therapy around how do we make evaluation work, what does evaluation mean to us? This is what evaluation means externally. What does evaluation mean here? What jobs does it have here?[AQ] They were able to talk amongst themselves to make decisions and definitions and expectations of themselves [D]. [Tania]

The remaining types of coaching have not been addressed in research on ECB (Labin et al., 2012), although we found evidence of both types of coaching in this case study. *Results coaching* characterized by the coach working with the coachee to complete milestones and goals of the project (Berg & Karlsen, 2007). Within this case, it represented how the staff members understood the steps needed to plan for and complete evaluations and how the coach provided assistance or guided museum staff in planning and completing evaluations. The results coaching emphasized assisting staff members in their performance of the evaluations. Similarly, the evaluation coach explained "My role was to teach them and give them examples of evaluation theory and procedures and make the everyday tasks of evaluation relevant and doable by breaking everything down into doable task management steps [CK]." Results coaching allowed the staff members to utilize their new evaluation knowledge and skills to complete evaluations successfully and it helped the staff to realize that evaluation was part of organizational learning.

Many staff members reported how they were currently working on evaluations and described the assistance they were receiving from the evaluation coach.

Yes, she helped me with questionnaires and getting the responses to those. More than anything, she brought an insight to me [CK]–hit home–you have to make an impact: "Why is this important?"... "Why is this data even relevant?" [AQ] During professional development, she talked about the impact and after final reporting, we can still talk about that impact and try to get into the schools and have more people to back us up and support what you're doing [D, CV]. Servicing students and teachers, telling that to principals – maybe they will want us there! I thought the final step was the final report, but you can do more than that–you can go to schools and pitch your program to a lot of schools [CK]. (Tom)

In addition, Tania noted instances when the staff supported each other and provided feedback on each other's work.

If one person was getting stuck on the logic model wording for activities or outcomes or outputs, they would just go over to someone else's desk to ask for help [D]. They provided support to each other in that way and also they saw each other's finished products, which were helpful to those who might be stuck on a particular task [CK].

Several staff members described specific assistance they received during evaluation coaching.

I showed up with all my evaluation questions, and we went through them and tried to figure out which were being asked repeatedly [D] and which were best to show data, numbers, etc... Well from my evaluations, she's definitely made them [questions] a little more easy to read...Easier to implement [CK]. Rather than mine where I was jumping all over the place. (John)

Second, *developmental coaching* focused on internalizing the new knowledge and skills as part of the coachee's career. For Berg and Karlsen (2007) model on project management this meant that the team took on more project management responsibilities. It also included making changes in the organization to encourage project management. In the current case the developmental coaching is viewed as the museums' new level of evaluation capacity. The staff members began to take ownership of the evaluation duties, and began to view evaluation as an important activity and ongoing within the education department of the museum. The Director of the department stated

Everybody is responsible for reporting on their programs. Every 6 months we're going to report on our programs [D]. They're not all comfortable, and they're not all in the same part of the process,... We have moved to the next step in the evaluation process. We understand purpose, and we understand the outcomes [CK]. At some point, it stopped being an assignment, and it's become engrained as a part of what we do [CB]. (Camila)

She goes on later to indicate that evaluation needs to become a part of the Museum culture and that personnel in other departments need to be educated about evaluation and that the staff in the education department could serve as coaches to other departments.

We need to make it [evaluation] a priority for all programs at the museum to bring everyone up to speed on evaluation [CB]. We need to increase people's comfort levels, knowledge, and awareness to make sure that each individual is competent to carry out evaluation individually [CK]. Experts within our team could be supports for everyone else. This should be a museum-wide initiative. In the end, data is our friend. It not only helps us check what we do, it helps us to get further ahead [CV]. (Camila)

Several staff members echoed similar ways of thinking about their new evaluation responsibilities within the education department and the importance of developing evaluation culture in the museum. "We have to embrace this as our reality, and we have to contribute to it. And in that same process, the opportunity to show ourselves and the world how to evaluate programmes like ours" [CB] (Leo). The evaluation coach also had this vision for evaluation. "I think my goal was always for them to use evaluation to improve their programmes, become better arts-educators and help them direct their programming so that funds are used in the most fruitful manner possible, rather than just providing fluff programming towards no end" [CV]. Berg and Karlsen (2007) identified developmental coaching as the most advanced type of coaching, which we also confirmed in this case study.

Our analysis indicates that while the types of coaching described by Berg and Karlsen do have different coaching purposes, all types of coaching do play a role in facilitating the learning processes described by Preskill & Torres, 1999a; Preskill & Torres, 1999b. Fig. 1 provides an adapted model of the *Evaluative Inquiry* approach that places the types of coaching in the centre of the model to how the coaching process and types of coaching can contribute to the *Evaluative Inquiry* approach.

5. Discussion

5.1. Summary of findings

Similar to prior research on ECB (Labin et al., 2012), we found more evidence of knowledge and skills coaching than personal coaching. This fits with Berg and Karlsen's (2007) model of coaching, as personal coaching is more complex and time consuming, and aligns with the personal development coaching described by Ives (2008). By utilizing a framework for coaching from outside the field of evaluation, we also identified results coaching and development coaching as two new areas for coaching that have implications for ECB. The results also demonstrated that using various types of coaching (Berg & Karlsen, 2007) facilitates the learning processes described by Preskill and Torres model (1999a, 1999b) and fostered individual, team and organizational learning. This study demonstrated the potential impact on individuals and the organization of a five year, long-term ECB effort through evaluation coaching. Museum personnel acquired key knowledge and skills needed to conduct evaluations in their setting, clarified beliefs about the importance of evaluations, and clarified the value of conducting evaluations within their organization.

Finally, this study is consistent with prior research that supports the role of the organization in ECB. Taylor-Ritzler, Suarez-Balcazar, Garcia-Iriarte, Henry, & Balcazar (2013) developed the Evaluation Capacity Assessment Instrument based on a model of ECB that included individual factors, organizational factors, evaluation capacity outcomes, and mainstreaming and use of evaluation. Their results suggested that ECB efforts should focus on the organizational factors — leadership, learning culture, and the appropriate resources — because they mediated the relationship between the individual factors and evaluation capacity outcomes. Taut (2007) conducted an action research study of self-evaluation capacity building interventions for international development organizations. Labin et al. (2012) included this study in their research synthesis of ECB. Her interventions involved providing training and materials rather than coaching. She found that without an organizational culture and infrastructure that supported evaluation (e.g., low-trust environment, resistance among employees, use of audit and control techniques for management and evaluation, lack of leadership support for evaluation) only small pockets of individual learning occurred, which was evident by changes in participants' attitudes toward evaluation, knowledge about evaluation, and behaviours. Based on feedback from the participants, she also concluded that "on-the-job facilitation" (p. 54) was critical to support participants in transferring what they learned from the workshop. Taut's study indicated while "on-the-job facilitation" was critical to transferring learning to context that contextual barriers do influence the degree to which ECB occurred within an organization. The current study demonstrated that an evaluation coaching model, a form of "on-the-job facilitation," in a context that supports learning evaluation does promote ECB and organizational learning.

5.2. Lessons learned for evaluation practice

This case study of an evaluation coaching model including monthly large-group professional development sessions coupled with one-one-one meetings provides at least four lessons learned for the greater evaluation community: (1) learning evaluation takes time, (2) coaching facilitates ECB, (3) in time evaluative thinking can become institutionalized, and (4) evaluation coaching relationships ought to be ongoing.

Over time, this evaluation coaching model has produced a cadre of programme coordinators in the Museum that have internalized evaluative thinking as a part of their programmatic implementation, developing logic models and connecting planned theoretical outcomes to the proposals written by the development department, as well as measuring consistent and long-term outcomes across programmes. Because not all programme personnel will begin the evaluation process at the same level of interest, exposure, and understanding, the one-on-one component of this evaluation coaching model allows the coach to provide each programme coordinator with the specific detailed evaluation strategies needed at that time to move their specific evaluation process forward. And certainly, due to personnel turnover and the complex nature of more advanced evaluation skills, on-going evaluation support from an evaluation coach will be required for purposes of illustrating data, conducting statistical analysis, reporting and reflecting on results. Clearly, embarking upon an evaluation coaching approach does require a specific set of coaching competencies, beyond a methodological expertise.

5.3. Implications for evaluation practice: Evaluation coaching competencies

Stevahn, King, Ghere, & Mimmema, 2005 suggested that evaluator competencies represent specific evaluation information, capabilities, and practices essential to conducting programme evaluations. While the technical aspects described by Stevahn and colleagues (2005) appeared necessary for evaluation, we questioned if these competencies are sufficient to engage in evaluation coaching, particularly in regards to promoting ECB. The promotion of evaluation capacity requires shifting toward a learning paradigm perspective for both the stakeholders and the evaluator (Preskill, 2008), implying that evaluation coaches need additional competencies. Preskill, Zuckerman, & Matthews (2003) suggested that genuine dialogue, promoting participation by all, open-mindedness, and fostering trust are critical to promoting ECB. Evaluators who wish to promote process use must engage in activities not typically taught in evaluation courses, such as identifying and acting on teachable moments, engaging in meaningful personal interactions, leading groups and promoting team building with stakeholders (King, 2007).

The specific qualities that defined Tania's personal approach to being an evaluation coach were two-fold: her training and experience as a social worker combined with her training and experience as an evaluator with several non-profits on tight budgets. She attributed her previous training and experience as a social worker of primary importance when she was supporting the programme staff through the changes in behaviour necessary to conduct evaluation internally. At times, the programme staff would become "stuck" (Newman, 1994) and she would help them through the cognitive dissonance to decide what new strategies would work best for them. Her training as an evaluator with a well-rounded mixed-methods background, allowed her to make suggestions that would meet the information needs of the client, regardless of paradigm. And her previous experiences working with non-profits allowed her specific insights that helped her understand the struggles that accompany tight budgets and lack of technical expertise in conducting high-quality useful evaluations. In this case the coaches training and experiences outside of evaluation helped fulfil some of the non-technical competences need to promote EBC. This suggests that simply having conducted

evaluations in the past or having completed course work in evaluation might not adequately prepare individuals to serve as an evaluation coach.

As evaluation coaching becomes an option for assisting organizations in conducting their own evaluations and promoting ECB, the field must begin to explore how the competencies for evaluation coaching differ from the competencies for conducting evaluations. This might include examining how coaching competencies might differ based on the type of coaching. The current study borrowed from business models of coaching to examine types of coaching in evaluation. We suggest that evaluators examine the competencies for coaching described in disciplines such as psychology, counselling and social work to understand the important competencies needed to fulfil the role of evaluation coach.

5.4. Limitations

We relied on evidence from interviews at one time point in the evaluation coaching process; consequently, this study lacked evidence based on observations across time. Observations are a common data source in case studies (Mabry, 2008; Stake, 1995). Although we developed the interview protocols after observations of the department and were able to elicit stories of concrete experiences in the interviews, the interviews depended on self-report of their actions and changes, which an interviewee might not be able to describe explicitly. This limitation in the methods might explain why evidence of reflection was less evident in the findings than asking questions and clarifying knowledge and beliefs.

This study did not represent failures in utilizing evaluation coaching. Cases that have had minimal success provide rich learning experiences (e.g., Taut, 2007). Given that we examined a successful case, it does not mean that this coaching model might produce these impacts in all settings and contexts. Rather, this case demonstrated how the coaching took place within a particular context, demonstrating what is possible and under what types of conditions this success existed. Preskill and Boyle's (2008) model of ECB is a means to gain a clearer understanding of the macro elements that influence ECB and how these might also need to be addressed when employing an evaluation coaching model to build capacity. During the five years there was no formal evaluation of the coach by staff. Although this case study did provide some insight into staff's perceptions of Tina's caching practice, it does not serve as an evaluation of her work as a coach.

6. Conclusion

Over the last few decades, philanthropy has undergone shifts in our society. Traditionally, non-profit organizations set the agendas for funding by identifying particular needs or innovative solutions, and then approaching foundations about funding them. Currently, it is much more common for foundations to set funding agendas, and then non-profit organizations have been in a position to respond to these agendas to receive funding. As non-profit organizations face requirements of showing the value of their programmes, ECB is critical. Coaching, a developing role for evaluators, offers one method to foster ECB at a low cost to the organization. This case illustrated how developing ECB and organizational learning within a non-profit organization facilitated the organization in reclaiming ownership for their funding agenda. This case also explicated what an evaluation coach does to facilitate ECB.

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