Competitive champions versus cooperative advocates:

Understanding advocates for evaluation in non-profit organisations

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ABSTRACT

Evaluation offers non-profit organisations an opportunity to improve their services, demonstrate achievements, and be accountable. The extant literature identifies individuals who can enhance the uptake of evaluation as *evaluation champions*. However, a paucity of detail is available regarding how to identify them and the support they require. This research investigated the characteristics and motivations of evaluation champions and examined how they promoted and embedded evaluation in an organisational system.

Drawing upon the literature and social interdependence theory, the research took an interpretivist perspective to collaboratively generate knowledge about evaluation champions. Derived from the literature review, evaluators used descriptive criteria to nominate champions working in Australian human and social service non-profit organisations. The research involved interviewing 17 champions, four of whom also participated in organisational case studies. Analysis of the semi-structured interviews and case studies generated data about the activities, strategies, motivations, and attributes of individuals who championed and advocated for evaluation.

This thesis argues that *evaluation advocates* is a preferable descriptor when attempting to embed evaluation by cultivating mutually beneficial interactions and cooperative working relationships. This research defines *evaluation advocates* as individuals who motivate others and provide energy, interest, and enthusiasm by connecting evaluation with colleagues' personal aspirations and the organisational goals to make judgements about effectiveness.

The original contribution to knowledge is the definition and a field guide for evaluation advocates to facilitate their identification, recruitment, support, and development. This research is also useful for understanding how to effectively structure cooperative teamwork to achieve common goals in increasingly competitive organisational environments.

Key words: Non-profit organisations, evaluation advocates, evaluation champions, cooperative teamwork, social interdependence theory.

DECLARATION

This is to certify that:

- the thesis comprises my original work towards the degree of Doctor of Philosophy except where indicated in the preface;
- I have made due acknowledgment in the text of all other material used; and
- the thesis is fewer than 80 000 words, exclusive of figures, references, and appendices.

Signed:

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PREFACE

During this PhD program, I wrote four scholarly publications related to the research question. One was integral to the thesis and three were reflecting on my personal experiences in relation to the topic of evaluation. Table A provides a reference for each publication, the nature and contribution of co-authors, and the sections of the thesis to which the publications relate. None of the publications are standalone chapters in the thesis. The publications represent isolated components of the research process. The thesis serves to synthesise all work and findings of the research and references the publications where applicable. Table B lists all conference presentations delivered during the candidature. I have also co-authored other scholarly publications prior to and while undertaking the research but these were not specifically related to the research question. Where relevant, I have referenced these in the text and they appear in the reference list.

Table A

Publication	PhD student original contribution	Contribution of co-authors	Relevant section(s) of the thesis	Relevant page numbers
Rogers, A., & Gullickson, A. (2018). Evaluation champions: A literature review. *Journal of MultiDisciplinary Evaluation*, *14*(30), 46-63.	85% Conceptualised study, implemented research, and authored paper.	15% Provided planning support and assistance with conceptual framework.	Chapter 2 Literature Review and Chapter 6 Discussion.	Pages 38–80 and 273–276.
Rogers, A., Kelly, L. M., & McCoy, A. (2019a). Evaluation literacy: Perspectives of internal evaluators in non-government organizations. *Canadian Journal of Program Evaluation*, 34(1), 1–20.	65% Conceptualised study, implemented research, and authored paper.	35% Provided planning support, implemented research, and revised and edited content.	Foreword and Chapter 7 Conclusion.	Pages 17 and 293.
Rogers, A., Kelly, L. M., & McCoy, A. (2019b). Pathways to becoming an	65% Conceptualised study,	35% Provided planning support,	Foreword.	Page 17.

internal evaluator: Perspectives from the Australian non-government sector. *Evaluation and Program Planning,* 74, 102–109.	implemented research, and authored paper.	implemented research, and revised and edited content.		
Rogers, A., Kelly, L., & McCoy, A. (2021). Using social psychology to constructively involve colleagues in internal evaluation. *American Journal of Evaluation (In Press)*.	65% Conceptualised study, implemented research, and authored paper.	35% Provided planning support, implemented research, and revised and edited content.	Foreword and Chapter 2 Literature Review.	Page 17 and 72.

Table B

Presentation title	Conference
Poster Presentation - Evaluation Champions (Based on literature review for this research).	Australian Evaluation Conference, Perth, 2016.
What does it take to sustain evaluative thinking? Opportunities and challenges for non-profit organisations.	Australian Evaluation Conference, Perth, 2016.
Poster Presentation - Evaluation champions versus naysayers: Battling complex dynamics for organisational change (Related to recruitment strategy for this research).	Australian Evaluation Conference, Canberra, 2017.
Evaluation Literacy: Exploring the skills needed to motivate and enable others to access, understand, and use evaluation information in non-government organisations.	Australian Evaluation Conference, Launceston, 2018.
Not champions, advocates! Supporting evaluation in non-profit organisations.	Australian Evaluation Conference, Sydney, 2019.

Also, the names of participants and organisations included herein are pseudonyms, as per the confidentiality agreement with The University of Melbourne's Human Research Ethics Committee (ID: 1647875) and consent forms with participants. To uphold the agreement of confidentiality, I have not named websites, documents, and other sources used to gather information that were directly linked to the case study organisations.

DEDICATION

I dedicate this thesis to my mother and father, Christine Lorraine and the late James Lorraine, who gave me every opportunity to reach my potential. I am endeavouring to repay them by using what I have learnt to work with others for a more equitable world.

ACKNOWLEDGEMENTS

I would like to acknowledge Aboriginal and Torres Strait Islander Peoples as the traditional owners of Australia and pay my respects to Elders past, present, and emerging. As a white Australian with convict ancestors, I will always be grateful to the Worimi traditional owners for allowing me to grow up on their country. I would also like to thank the Aboriginal and Torres Strait Islander Peoples of the Warumungu, Jawoyn, and Larrakia lands for making me feel welcome over the past 20 years in the Northern Territory of Australia.

I am indebted to an extraordinary team of supervisors. The way they worked together was inspiring and I feel grateful to have been part of such a practical, experienced, and wise team. Associate Professor Amy Gullickson, Professor Elizabeth McKinley, Professor Jean King, and committee chair, Professor Janet Clinton gave guidance that stopped me from going down wombat and squirrel holes, propelled me forward, and enabled me to keep on keeping on. They supported me to grow professionally, academically, and personally.

My qualitative coaches, Dr Jan Ritchie, Dr Jeannie Devitt, and Johanna Bell, provided invaluable advice, expertise, and support. They were inspirational mentors whom I emulate. The support and commitment of my co-authors, Dr Leanne Kelly, Dr Alicia McCoy, and Dr Catherine Malla, propelled me to achieve beyond what I could have achieved alone. My network of critical friends provided pearls of wisdom just when I needed them most. I appreciated the advice and suggestions of Dr Susan Bandias, Dr Megan Ferguson, Dr Julie Brimblecombe, Dr Lyn Alderman, and Dr Marita Hefler, among others. They are an awesome bunch of academics and I am privileged to walk among them.

My PhD friends and colleagues were a source of fun, laughter, motivation, and consolation. They were not afraid to ask the tricky questions – never a tougher audience! Always willing to listen, write alongside, share, and contribute. Thank you, Dr Ghislain Arbour, Dr Krystin Martens, Dr Ruth Aston, Dr Brad Astbury, Kim Grey, Amanda Jones, Dr Mathea Roorda, Timoci O'Connor, Dr Rebecca

Hardwick, Dr Christine Tarbett-Buckley, Dr Jane Munday, Dr Kathryn Meldrum, and Dr Danielle Aquino.

I would also like to send a massive shout out to my friends and colleagues from the Indigenous Australia Program at The Fred Hollows Foundation. Being so flexible and allowing me to share the research experience made me feel so privileged and fortunate to work with such an amazing, generous, funny, and inspirational bunch of people.

Thank you to all the evaluators who helped me to find participants – this research would not have been possible without their generosity. I appreciate the time and effort they took to recommend and introduce me to their colleagues.

The participants in this research deserve my sincerest gratitude. I hope this thesis goes someway to recognising the inspirational work that evaluation advocates are contributing to their organisations. I was not able to include every story, but I deeply valued all contributions as all the shared experiences enhanced my understanding. Please know that there are others out there in similar situations and many more supporters who appreciate the efforts of evaluation advocates and their role in making the world a better place.

My brother, Anthony Lorraine, provided me with the technological infrastructure to complete this work. His wisdom was pertinent: always plan for a disaster. On behalf of our entire family, we appreciate his ongoing and always cheerful *helpdesk* support.

And last but never least, to Pete, Mr Bernard, Ms Scrappy, and the late Mr Baci, I am grateful for everything. xxx always.

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FOREWORD

I have worked as a live-in-carer, a bilingual interpreter for newly arrived immigrants, a support worker for refugees, a women's development program officer, and in roles that aimed to improve health equity. While working in non-profit organisations, I attempted to determine whether I was making a difference. Several professional pathways – health promotion, public health, and community development – meant I informally drew upon evaluation. Only when an evaluator reviewed my program did I discern the potential of applying evaluation logic. Subsequently, I asked questions, engaged evaluation expertise, allocated resources, scoured the internet, joined networks, and encouraged others to think evaluatively.

Although management promoted me into an internal evaluation role and I completed formal training, in contrast with my other careers, I was ambiguous about my role. I struggled to grasp my professional identity. I thereby initiated this research by asking if I deserved the title of internal evaluator. I wondered if my role was more aligned to building organisational evaluation capacity? Or were my evaluative thinking skills just part of my project management skill set?

I spoke publicly of my professional angst at evaluation conferences and subsequently connected with two other internal evaluators from the non-profit sector. They had similar feelings of unease about identifying as internal evaluators. What started as a self-help group contemplation developed into a formal period of reflection involving three qualitative, self-narrative exploratory inquiries. We investigated how we developed evaluation literacy, our pathways into internal evaluation, and how we engaged with colleagues to promote evaluation (Rogers, Kelly, & McCoy, 2019b, 2019a, 2021).

These investigations occurred while I was collecting data for this research. They involved a self-reflective and iterative pattern that compared and contrasted my experiences and positionality with peers and participants. I reflected upon my underlying beliefs and assumptions regarding the sector, evaluation as a field, and interpersonal interactions with others. I attempted to make my

biases and values clear; I desire to make the world a better place, I aspire to support other human beings to achieve equity, and I want to support people to work in ways that will achieve positive changes. Overtly recognising that I brought these values with me was the first step in interpreting the data. I acknowledged these beliefs could impact the way I was reporting the findings.

My approach to this research was broad in scope, collaborative, focused on the interpersonal, and strengths-based. It was broad in the sense that I did not limit my investigation to any type of human social service organisation, form of evaluation, level of experience, cultural background, or gender. I recognised this as a collaborative process from the outset with the purpose of identifying the ways in which people working under challenging conditions influenced their colleagues. I focused this research on tangible interpersonal interactions because at previous points in my career, I have felt paralysed by the weight of structural barriers, systematic inequalities, and the burden of social determinants that were beyond my control. More than anything else and from the outset, I made a conscious effort not to contribute to the problem-based, deficit-focused culture of the non-profit sector; I endeavoured to ensure this was strengths-based research, studying where things were working, and how positive change was occurring.

Hence, this thesis was a voyage of self-discovery that collaboratively investigated interpersonal experiences. The work of non-profit organisations to improve circumstances for families, communities, and society is admirable. However, the intent of this research was to unravel how participants influenced their colleagues, possibly resistant, to see the potential for evaluation and determine whether they *actually* were making a difference. This thesis demonstrates how participants from any level of the organisational hierarchy were able to instigate cooperative ways of working around evaluation. It provides a collation of the participants' useful strategies and appropriate ways of working with a focus on evaluation, but might also be inspiring on a theoretical level for anyone wanting to work in cooperation with resistant individuals to achieve mutual aspirations.

CHAPTER 1 – INTRODUCTION

For over 10 years, Tahlia, an Aboriginal and Torres Strait Islander woman, asked questions, applied data, and used evidence to demonstrate the changes needed to make a difference in her community. She was working in a non-profit organisation and held a board position on another organisation. Tahlia did not self-identify as an *evaluation champion,* but an evaluator nominated her to be a participant in this evaluation research because Tahlia used evidence to help facilitate organisational change, improve services, show how they were making a difference, and be accountable to donors. Tahlia also used data to advocate for equity. She purposefully attempted to use evaluation to address underlying inequalities and change people's lives for the better. She was not alone in her efforts to promote evaluation, but she was in the minority.

Tahlia attempted to embed evaluation into routine operations of her organisation, but she experienced structural impediments and resistance from colleagues. Initially, she was fearful of the word *evaluation* and reluctant to get involved, but after participating in workshops and learning more, she overcame her fear and has acted as an advocate for evaluation as part of her role on the board, in her workplace, and even with her family. Tahlia used her recollections of feeling anxious to help her understand what others experience when they engage with evaluation for the first time. She became adept at finding ways to prompt the people around her, including her manager, to initiate their own ideas for evaluation activities. Among her peers, friends, and trainees, who were also grappling with issues of equity and advocacy, she continually provided encouragement, made suggestions, and identified the value of getting involved. This research focused on people like Tahlia, individuals who are champions for evaluation in their organisations.

The purpose of this research was to investigate the characteristics and social processes of individuals who champion evaluation and examine how they work in Australian non-profit organisations. To identify, understand, support, and encourage evaluation champions to increase the uptake of evaluation, the research investigated their characteristics, motivations, and how they

promoted and embedded evaluation in an organisational system. The focus was on individuals working in non-profit human social service organisations to examine how they work under challenging circumstances.

This chapter outlines the underlying problem and presents the rationale for why researching evaluation champions is a worthwhile pursuit. It briefly introduces the phenomenon of the champion to illustrate how they can help meet the challenges that employees like Tahlia face in providing evaluative information. The chapter articulates a definition of evaluation for the purposes of this research, provides contextual detail around the non-profit sector, and examines the issues associated with evaluation in non-profit organisations. It outlines the research objectives, the research questions, and includes an overview of the methodology that informed the research. The chapter concludes by presenting how the thesis is organised.

Statement of the problem

It can be challenging to make evaluation relevant, meaningful, and useful for non-evaluators working in organisations. Barriers can be related to structural issues, resource constraints, and interpersonal challenges (Bach-Mortensen et al., 2018; Campbell & Lambright, 2017; Gilchrist & Butcher, 2016; Norton et al., 2016). Specifically, people may resist becoming involved because of the lack of dedicated resources, disconnected priorities, previous negative experiences, feelings of distrust and anxiety, and difficulties with evaluation concepts and terminology (Chaudhary et al., 2020; Donaldson et al., 2002; Geva-May & Thorngate, 2003; Mason & Hunt, 2018; Newcomer & Brass, 2016; Whitehall et al., 2012).

However, there are some individuals, who are not evaluators, but who display a positive attitude towards evaluation and seek to incorporate it into their practice. Referred to in the literature as *evaluation champions,* these individuals are non-evaluators who advocate for evaluation, understand the context, encourage the involvement of others, and use the evaluation findings (Chaudhary et al., 2020; King & Volkov, 2005; Labin, 2014; Preskill & Boyle, 2008a, 2008b;

Taylor-Powell & Boyd, 2008; Wade & Kallemeyn, 2020). Research specifically focusing on evaluation champions has shown how important they are for the success of an evaluation initiative and for supporting evaluation to be embedded into the routine operations of organisations (Silliman et al., 2016a, 2016b).

A paucity of literature exists about how to identify evaluation champions and how to support them to enhance the uptake of evaluation. It is not well understood how or why they take up this role, how they source knowledge and expertise, how they influence evaluation practice, or what strategies they use to embed evaluation in organisational systems (Shaw & Faulkner, 2006; Silliman et al., 2016a, 2016b). As such, an understanding of how evaluation champions consider multiple perspectives to collaborate and innovate with others around evaluation is lacking. The field of evaluation needs to articulate and document how champions operate in practice to learn, emulate, and support their efforts.

This is a significant issue in non-profit organisations because without evaluation, organisations may be less likely to know if they are making a difference or communicate their achievements. Additionally, non-profit organisations may risk financial sustainability as funders apply pressure for information (Bach-Mortensen & Montgomery, 2018; Bryan & Benenson, 2020; Campbell & Lambright, 2017). Non-profit organisations providing human and social services can use program evaluation to improve, monitor progress, demonstrate effectiveness, increase their impact, share information with funders, donors, and stakeholders, and be accountable in an increasingly competitive environment (Carman & Fredericks, 2010; Harman, 2019; Murray, 2010). Providing credible evaluative evidence to multiple audiences can help non-profit organisations demonstrate how they are using their funding and ultimately help them achieve their aspirations (Chaudhary et al., 2020; O'Brien & Craig, 2020).

Hence, the purpose of this research was to investigate the characteristics and examine the social processes of evaluation champions working in non-profit organisations. Evaluation champions

may assist co-workers in organisations to increase the uptake of evaluation. A description of people who champion evaluation and an explanation of the strategies they use to influence co-workers and achieve change would help evaluators and decision makers in organisations identify, attract, recruit, supervise, retain, and develop their capacity. If evaluators and decision makers understood more about evaluation champions' characteristics, motivations, and behaviours, they could better support their efforts, share their strategies, and provide examples of how to effect change and influence people. Understanding more about evaluation champions provides one pathway to help non-profit organisations meet the multiple demands for information and increase organisational potential for helping communities fulfil unmet social needs.

Evaluation

Evaluation can assist with decision making, reporting, improving, and assessing value (Davidson, 2005). This section introduces evaluation, articulates the potential purpose and historical connections to organisations, details an approach to embed evaluation, and provides background on positions in organisations that specifically focus on evaluation. The purpose is to broadly describe the theoretical context within which evaluation champions are located. It concludes by providing the definition of evaluation that will be used in this research that aligns with Rogers' and Williams' (2006) suggestion in relation to organisations: "Evaluation can be intended to find 'the best way' to do things overall, or to discover a better way to do things in a particular situation or to develop practitioners' abilities to respond and adapt in different ways to respond to the particular needs of individual service users" (p. 76).

Different theoretical perspectives about evaluation exist, and a myriad of frameworks, approaches, and methodologies across the field have been developed since the 1970s (Alkin, 2013). Evaluation has emerged from a two-part foundation based in measurement, focusing on accountability and control, and on social inquiry or social science research (Alkin & Christie, 2013). Alkin and King (2016) support this understanding of the history of evaluation by stating: "one

focused on tests and measurement, primarily in education, and a second focused on social research methods, primarily concerning knowledge utilization" (p. 1).

The *Encyclopedia of Evaluation*, defines evaluation as "an applied inquiry process for collecting and synthesizing evidence that culminates in conclusions about the state of affairs, value, merit, worth, significance, or quality of a program, product, person, policy, proposal, or plan" (Fournier, 2005, p. 140). Seeking a judgement about the value of something is what distinguishes evaluation from research, epidemiology, journalism, auditing, or polling (Fournier, 2005). The inclusion of "applied inquiry process" in the definition above infers to a systematic approach where evaluation goes beyond making choices based on criteria (Fournier, 2005, p. 140). In this formal systematic process, an underlying logic provides a foundation for evaluation as a transdiscipline (Scriven, 1991). Schwandt (2015) summarises Scriven's (1991) four-step logic as:

- Select criteria of merit
- Set standards of performance on those criteria
- Gather data pertaining to the performance of the thing being evaluated on the criteria relative to the standards
- Integrate the results into a final value judgement (p. 17)

Systematic evaluation can be undertaken in different ways, but it is generally initiated for two reasons linked to reporting or decision-making purposes for improvement or an assessment of quality or value (Davidson, 2005). While there are a range of possible evaluation approaches, "it is important to begin with a clear understanding of what evaluation is and what kinds of evaluation questions need to be answered in a particular case" (Davidson, 2005, p. 3). The primary evaluation questions in non-profit organisations relate to finding out the absolute merit or the relative worth of an evaluand to demonstrate the overall quality or to compare with other options (Davidson, 2005).

Preskill and Torres (1998) made an early connection between evaluation and organisational learning. Their book was aimed at evaluators, organisation members, development, and

management consultants and proposed that *Evaluative Inquiry* was a form of organisational learning (Preskill & Torres, 1998). Preskill and Torres (1998) defined Evaluative Inquiry as

> An approach to learning that is fully integrated with an organization's work practices, and as such, it engenders (a) organization members' interest and ability in exploring critical issues using evaluation logic, (b) organization members' involvement in evaluative processes, and (c) the personal and professional growth of individuals within the organization. (p. 1)

Preskill and Torres (1998) recognised there could be limitations if a supportive environment was not present, but still promoted that "through dialogue and reflection, and through asking questions and identifying and clarifying values, beliefs, assumptions, and knowledge, organization members and the organization can learn from their practices and experiences to create a better future" (p. 191).

Subsequently, evaluation capacity building was defined as a deliberate and planned approach to make evaluation part of ongoing operations and everyday practices with a focus on learning (Stockdill et al., 2002). Cousins, Goh, Clark, and Lee (2004) led the application of evaluation to organisational learning and discussed how organisational infrastructure could foster, support, and integrate evaluation into the organisational culture. In 2005, a learning organisation was defined as "one that acquires, creates, evaluates, and disseminates knowledge – and uses that knowledge to improve itself" (Davidson, 2005, p. 3). Further research also demonstrated that evaluation mainstreaming is possible where organisations systematically, fundamentally, and sustainably integrate evaluation into the organisational culture and practices (Gullickson, 2010).

An extensive body of literature recognises internal evaluators for their importance in advocating for evaluation, building the evaluation capacity of employees, connecting evaluation with organisational learning, influencing decision makers, supporting improvements, making judgements about programs, and ensuring that evaluation is relevant for the context (Bourgeois et al., 2011; Clifford & Sherman, 1983; Leviton, 2014; Love, 1991; S Mathison, 2011; Sonnichsen, 2000; Volkov, 2011). Volkov and Baron (2011) understand internal evaluation to include the contextually

dependent processes, resources, and systems for undertaking evaluation within the organisation. A prominent long-time proponent of internal evaluation, Love (1983), believes that evaluation is "essential for survival, because it provides the information crucial for program improvement, accountability, and planned change under adverse circumstances" (p. 5).

This thesis acknowledges that some organisations are mainstreaming evaluation (Gullickson, 2010), some are undertaking an intentional evaluation capacity building approach (Stockdill et al., 2002), and others are meeting their evaluative needs through, among others, process use (King, 2007), and developmental, collaborative, participatory, and empowerment evaluation approaches (Cousins & Chouinard, 2012; Fetterman & Wandersman, 2007; O'Sullivan, 2012; Patton, 2008). However, in this research, to include as many participants, types of initiatives, and uses of evaluation as possible, from one-off initiatives through to developing evaluation systems, the research intentionally used a broad interpretation of what evaluation means in an organisational context.. For evaluation to become incorporated into the way an organisation does business, employees need opportunities to engage with evaluation as a concept, become familiar with what it can offer, recognise its value, and incorporate it into the way they work (Shaw & Faulkner, 2006; Wade & Kallemeyn, 2020). Thereby, this research adopted Rogers' and Williams' (2006) options for what evaluation in organisations could involve. It is based on an implicit understanding or reasoning of why the approach to evaluation is appropriate in that context; evaluation to determine if strategic ambitions are being achieved, evaluation of programs and services, and the establishment of evaluation systems for learning and improvement (Rogers & Williams, 2006).

Context: Non-profit sector

For non-profit organisations to increase revenue, understand their contribution toward changing people's lives, and ultimately survive, they need to demonstrate effectiveness and value, improve services, and meet demands for information from multiple audiences. Drivers for using evaluation may include board, leaders, staff, and funders having a desire for evidence-based policy

and management decisions, wanting an understanding of impact and value, needing to improve the quality of their programs, and valuing the opportunity to learn (Bryan & Benenson, 2020). Non-profit organisations are using evaluation to assist in meeting the demand for information for learning, improvement, demonstrating effectiveness, and accountability (Alaimo, 2008a; Carman & Fredericks, 2010; Cousins et al., 2014; Gill, 2010; Hoole & Patterson, 2008; McCoy et al., 2013; Moxham, 2014; Ronalds, 2016; Tomkinson, 2016). While variability exists among non-profit organisations in relation to capacity, willingness, and resources available for evaluation, Carman and Fredericks (2010) conclude that some organisations are "actually succeeding with their evaluation efforts" (p. 101). This is potentially resulting in benefits more broadly across the sector because as organisations develop cultures of evaluation, they "can be aggregated and a stronger case can be built for the contribution of the not-for-profit sector" (McCoy et al., 2013, p. 19). In this section, I make the case for why the non-profit sector was an appropriate context for this research by defining non-profit organisations, detailing the large variety of types and purposes, and describing the workforce.

A non-profit organisation that differentiates itself from for-profit businesses and from government departments and authorities can be called a charity, not-for-profit, community-based organisation, foundation, third-sector organisation, public benevolent institution, community organisation or association, development organisation, or non-government organisation (Australian Taxation Office, 2019; Hardwick et al., 2015; Lyons, 2020). In this thesis, *non-profit* defines organisations that are separate from government, have formal self-governing structures, have some voluntary contribution from members or a board, do not operate for the direct or indirect gain of members, and reinvest profits to carry out their purpose (Australian Bureau of Statistics, 2015; Australian Taxation Office, 2019; Salamon & Anheier, 1992). They are "are driven by their 'community-purpose', which may focus on their members, targeted groups in the community (often the disadvantaged) or, more broadly, the 'common-good'" (Productivity Commission, 2010, p. 15).

Non-profit organisations can vary greatly in size, purpose, values, modes of governance and operations, and activities, which could include health, education, sports, cultural, and religious activities, business, professional, community and neighborhood associations, unions, political parties, recreation societies, research, environment, development, housing, employment, finance, law, and social services (Shulman, 2012). According to the 2016 Australian Charities Report, there are approximately 51 000 registered charities in Australia with over $142 billion earned from donations and bequests, earned income, and government grants (Powell et al., 2017). The combined total income of the sector contributes 3.8% of Australia's gross national product; this was larger than the agricultural industry at 2.4% and the media industry at 3% (Knight & Gilchrist, 2014; McGregor-Lowndes, 2014; Pascoe, 2017).

Compared with those who work in other sectors, people who work in non-profit organisations are often trying to make a beneficial contribution to our society (Cornelius & Corvington, 2012; Drucker, 2005; O'Brien & Craig, 2020). For a large proportion of the non-profit workforce, "people don't work for a living, they work for a cause" (Drucker, 2005, p. 116). Workers are attracted to working in the non-profit sector and often accept lower remuneration because they may desire social justice, have an altruistic intrinsic desire to contribute, have connections to the community, enjoy working with people with similar value systems, appreciate having rewarding experiences at work, are driven by personal experiences, and appreciate the autonomy and flexibility the sector offers (Cornelius & Corvington, 2012; Hudson, 1995; Leete, 2006; Miltenberger, 2020; Productivity Commission, 2010; Smith-Ruig, 2018). As Smith-Ruig (2018) found: "The motivation to move into the sector was strongly driven by personal experiences, religious beliefs or the desire to make a difference" (p. 29). Values play a central role in non-profit organisations where beliefs, identities, enthusiasms are important as they result in personal value systems aligning with the values of the organisation (Hudson, 1995; Lyons, 2020; Park et al., 2018). The ability to build meaningful relationships with co-workers is also a significant characteristic of the non-profit workforce, particularly in smaller organisations (Jackson & Donovan, 1999; Miltenberger, 2020).

Challenges for evaluation in non-profit organisations

This section articulates the distinctive social, financial, and workforce pressures placed on human and social service non-profit organisations that are not found to the same degree in the public or for-profit sectors (Lyons, 2020). To summarise, "the environment in which nonprofit organizations exist is often dynamic and unpredictable. This requires nonprofit leaders and managers to position their organizations for success in uncertain environments" (Bryan & Benenson, 2020, p. 254). I argue that the challenges of measuring difficult social problems, addressing the information needs of multiple audiences, and dealing with anxiety around evaluation means that encouraging the uptake of evaluation can be more difficult in non-profit organisations than in other types of organisations.

Difficult to measure

The social problems these organisations are attempting to tackle are *wicked;* high community expectations, a lack of coordination, and underlying, inherent, and historical complexities means there are no easy solutions (Gilchrist & Butcher, 2016, p. 4). Maintaining financial solvency while trying to address society's most difficult problems and demonstrating tangible results for external accountability purposes is far from easy (Gill, 2010). Ronalds (2016) suggests that while attempting to provide communities with an opportunity to contribute to solving their local issues with their own solutions, it is challenging to "manage the implementation of programs designed to achieve complex social and economic outcomes, often in very difficult physical or politically charged environments" (p. 341). In addition, unforeseen events such as the global pandemic can drastically change the context for organisations attempting to continue to deliver and account for services to some of the most vulnerable people in society.

Thereby, traditional evaluation approaches need tailoring for the non-profit context due to the variety of different circumstances. Non-profit organisations need to undertake evaluation differently depending upon what questions they ask, how they collect and use information, their

sources of evaluation expertise, and the way they provide feedback, encourage reflection, and enact change (Baron, 2011; Beere, 2005; Bourgeois et al., 2011; Gill, 2010). To implement any form of evaluation, organisations may need to be flexible about how they source evaluation expertise for assistance. They could engage external evaluators for a finite period or for a longer-term partnership, apply a hybrid model of internal and external evaluation, access resources through the internet or professional networks, or have an internal evaluation unit that could either undertake the evaluation work or support program staff (Baron, 2011; Beere, 2005; Bourgeois et al., 2011; Gullickson, 2010; S Mathison, 2011; Miller et al., 2006; Picciotto, 2002; Youker, 2010). Bryan and Benenson (2020) contrast a traditional evaluation approach with what is required in a non-profit context. They suggest the need to allow for extensive considerations of the stakeholders, programming situation, and the broader organizational and environmental context. Without comprising rigor, they highlight the need to go beyond compliance, tailor the approach to fit the circumstances, and support organizational learning (Bryan & Benenson, 2020).

Multiple audiences

Revenue generation in non-profit organisations is difficult. Funding for non-profit organisations is predominantly self-generated from sales, fees, investments, or royalties, with the remaining amount coming in the form of grants, fundraising, and philanthropy from government, household donations, and the business sector (Hoole & Patterson, 2008; McGregor-Lowndes, 2014). Non-profit organisations are often dependent on grants, have unsecure funding streams, and operate on short-term strategic cycles (Braverman, 2013; Lee & Nowell, 2015). They are frequently constrained in what services they can deliver because they are shaped by funding body silos that can limit responsiveness to the needs of users (Herbert, 2015; Meagher & Healy, 2003). Organisations delivering social services for governments are subject to government regulation, and the accountability frameworks are often rigid and unable to consider new ways of orienting the funding relationship (Gilchrist & Butcher, 2016; Ronalds, 2016). A review undertaken regarding how the

government contracts non-profit organisations to provide services suggests that the current processes lead to “inappropriate risk transfer, micro-management, disincentives to innovate and poor service provision” (McBratney & McGregor-Lowndes, 2012, p. 19).

Thus, a disconnect frequently occurs when meeting the reporting demands of funders, as the internal model of practice in non-profit organisations is focused on delivering services, making improvements to operations, and being accountable to clients; staff often do not see the alignment between what they are being asked to report on and what they are doing (Botcheva et al., 2002; Campbell et al., 2012; Jackson & Donovan, 1999; Kearns, 2012; Kelly, 2021; King & Volkov, 2005; Naccarella et al., 2007). This is exacerbated in small organisations that do not have a specific role or dedicated evaluation unit and evaluation tasks have to be undertaken by internal staff supplementary to their normal duties (Bourgeois & Cousins, 2013; Carman, 2007; Garcia-Iriarte et al., 2011; Shaw & Faulkner, 2006; Stockdill et al., 2002; Whitehall et al., 2012). Staff have been known to express a dislike for evaluation when it is only focused on accountability, not related to learning, entirely driven by external demands for detailed information, and they experience pressure to be more “business like” (Bozzo, 2002, p. 78).

If evaluation is driven by external demands and reporting is not within the control of the internal staff, additional negative attitudes can arise. Staff can become concerned about not capturing qualitative data, they fear that making generalisations will diminish the experience of an individual, and they can be apprehensive about not upholding their clients’ rights to privacy. Traditional evaluation approaches that purport to be *gold standard* may not align with their community development approaches or worldviews (Kelly, 2021, p. 26). They may fear that their knowledge and potential to contribute is not valued, that narrow data collection will reduce the work they are doing to metrics that do not represent the depth of activity, that the data will be manipulated, and that time spent on entering data will detract from time that could be spent with clients (Jackson & Donovan, 1999; Peters, 2016).

Evaluation anxiety

Workforce dynamics in the non-profit sector mean that there is often resistance to change (Butler & Wilson, 1990; Drucker, 2005; Gill, 2010; Lyons, 2020). Gill (2010) suggests that many people in non-profit organisations, even when they are shown to be having a limited impact on their purpose, would rather keep on doing what they have always done rather than change. Lyons (2020) suggests this resistance may be related to the centrality of values where the staff or board are less willing to compromise and want to hold onto old ways of working because they embody the values or purpose of the organisation.

This can result in a refusal to question basic assumptions about how the organisation is operating and reluctance to face up to hard choices about where to place limited resources (Drucker, 2005; Gill, 2010). The non-profit organisational culture often does not support self-questioning, such as asking, "Is this the right thing to be doing?" (Gill, 2010, p. 19). Gill (2010) attributes this to the desire for the workforce to be associated with successful programs, and questioning may discover programs are not successful. However, not asking questions can lead to avoiding organisational issues and thereby contribute to serious problems (Gill, 2010). The passion, energy, and enthusiasm of the non-profit workforce who are committed to serving a good cause are strengths to drive change in society. However, researchers warn against not questioning basic assumptions because carefully and rigorously interrogating good intentions can assist with developing good policies, making appropriate decisions, and ultimately improving effective actions (Drucker, 2005; Gill, 2010).

Some employees may have also had negative experiences in the past that mean they are reluctant to participate or they are not able to allocate sufficient time to evaluation among other competing priorities (Chaudhary et al., 2020; Donaldson et al., 2002; Edmonson, 2003; Hyde, 2012; Lennie, 2005; Whitehall et al., 2012). Many employees of non-profit organisations have negative emotions associated with evaluation as confirmed by Geva-May and Thorngate (2003), who stated,

"Perhaps because of the stakes involved in evaluation, evaluees involved in any evaluated organization, policy or programme often feel threat, apprehension or anxiety about the evaluation process, and often try to influence or resist it" (p. 206). They may feel threatened about the thought of exposing programs that have not worked. They may feel anxious about exposing their personal weaknesses. Employees may become defensive, fail to cooperate, actively try to prevent evaluation from being undertaken, or avoid participating in any evaluative activities (Donaldson et al., 2002; Edmonson, 2003; Kegeles et al., 2005; Perrin, 2014; Taut & Brauns, 2003; Whitehall et al., 2012).

Extending this disconnect to the language used around evaluation, some employees may not understand the relevance, or they may find evaluation to be confusing if difficult terminology and abstract constructs are used (Mason & Hunt, 2018; Newcomer & Brass, 2016; Peters, 2020; Picciotto, 2017). Preskill (1994) suggested that there was an "anti-intellectual culture that exists in many parts of our society… [that] dismisses too readily anything that sounds 'academic'" (p. 297). Employees may doubt the value of the knowledge that researchers and evaluators contribute to the organisation if they perceive that they have not grasped the nuances of the operating context (Hardwick, 2019; Kelly, 2021; Naccarella et al., 2007; Preskill, 1994; Shaw & Faulkner, 2006). These issues are frequently evident in non-profit organisations where staff may be resistant to administrative tasks, focused on doing the practical hands-on work in the field, and reluctant to participate in tasks that will mean time or financial resources are diverted from helping their client group (Gill, 2010; Kegeles et al., 2005; McCoy et al., 2013).

Diversity among team members, both paid and volunteer, is a feature of the non-profit workforce that adds another dimension of challenge. Non-profits rely upon support and engagement with the client group for human resources related to service delivery and governance support; volunteerism is a distinguishing feature of the sector (Carman et al., 2008; Doherty et al., 2015; Leete, 2006; Powell et al., 2017). Thereby, many of those engaged with the organisations are strongly connected with the communities they serve and have multiple intersections of diversity,

including age, gender, cultural and linguistic background, and levels of education (Chouinard, 2014; Fujimoto et al., 2014; Hoole & Patterson, 2008; Hyde, 2004; Kirkhart, 2010). Implementing evaluation can involve using technical language or can be focused on discussions around values, criteria, merit, and other hard to define terms. Hence, communication issues can arise when two or more diverse groups interact who have been socialised in different ways and have had different cultural experiences (Sheu & Sedlacek, 2004).

Challenges can also arise when allocating evaluation tasks or roles due to different expectations about the level of participation and involvement of individuals in making decisions. It is a characteristic of value-led organisations where staff who believe in the cause and are invested in all parts of the organisation want high levels of involvement in communication processes (Hudson, 1995). The organisational culture in non-profit organisations can be focused on supporting the individual to find their place within the organisation, which could clash with efforts to exert power around an evaluation task or role allocation (Anheier, 2014; Butler & Wilson, 1990). For example, the organisation may place more value on personality traits such as loyalty and kindness than on competence or holding a particular skill. In practice, Jackson and Donovan (1999) explain this personal factor in the following way: “Interrelationships in small organisations are of a more intense nature than those in large ones and people are often expected to engage with one another as personalities rather than through the organisational roles that they occupy” (p. 111).

Thus, non-profit organisations are a challenging context in which to embed evaluation. Encouraging staff to engage with evaluation can be more difficult in the non-profit context than in other sectors. Non-profit organisations are trying to solve difficult social problems, operate in competitive funding environments with limited resources and discordant funder requirements, and produce information for multiple audiences. Resistance to change, reluctance to question assumptions, past negative experiences, difficult terminology, and a focus on individualism that supports the individual above organisational goals are underlying constant workforce dynamics.

Non-profit organisations employ a diverse workforce in which individuals may have a general level of anxiety around evaluation and distrust of knowledge that has not come from experience. As Janzen et al. (2017) stated, the challenges for these types of organisations to undertake evaluation include: "limited staff expertise in the technical research aspects of evaluation, ill-defined program theory, uncertainty as how to measure divergent outcomes among diverse clients, the excessive burden of evaluation on existing staff workloads, insufficient financial resources, and insufficient support from organizational leadership" (p. 163). Thereby, if evaluation is not understood and adopted by employees in an organisation, then the use of evaluation can become ad-hoc and not embedded in the organisational system (Chaudhary et al., 2020; Peters, 2020; Picciotto, 2002; Wade & Kallemeyn, 2020).

However, despite all the challenges, there is evidence that individuals can emerge who champion evaluation and form collaborations that can capitalise on the potential of evaluation to meet their organisation's needs (Silliman et al., 2016a; Taylor-Powell & Boyd, 2008; Wade & Kallemeyn, 2020). The next section will articulate that the research objectives were to explore and expand the understanding of individuals who were able to successfully advocate for evaluation under challenging circumstances in the non-profit context, followed by a section on methodology that provides a brief introduction to the ontological and epistemological research foundations.

Research objectives

Studying evaluation champions provided an opportunity to explore why and how non-evaluators are interested in evaluation and how they can increase the engagement of the people with whom they work. Although acknowledging that organisational, contextual, and structural factors have a major influence on enhancing or inhibiting the uptake of evaluation, this research focuses on understanding how individuals can promote and maintain evaluation on an interpersonal level. The objective of the research was to investigate the characteristics and examine social

processes of evaluation champions in non-profit organisations. The research questions were as follows:

- What are the characteristics of evaluation champions working in non-profit organisations?
- What motivates champions to include evaluation in their everyday practice?
- In what ways, and with whom, do champions promote evaluation?
- In what ways, and to what extent, do champions support evaluation to be embedded within the organisational system?

The research was based on the premise that evaluation is a tool that can help non-profit organisations be sustainable. The focus was on program evaluation. This research, for practical purposes, did not exclude any evaluation forms or approaches. It included one-off initiatives through to developing evaluation systems and intentionally used a broad interpretation of what evaluation means in an organisational context. This included organisations evaluating their own performance using assessments to see if they were achieving their strategic ambitions, evaluating their programs and services, and using evaluation systems for ongoing learning and improvement (Rogers & Williams, 2006).

The focus of the research was on Australian non-profit organisations aiming to improve people's lives by providing health, community development, and social services; these types of organisations address inequalities and human service issues by fulfilling community and unmet social needs (Doherty et al., 2015). Participants in this research worked in organisations that supported the elderly, homeless, and minority groups to engage with the wider community, developed community-driven projects, and provided services for newly arrived refugees. They also supported Aboriginal and Torres Strait Islander Peoples and marginalised groups to achieve equity and overcome barriers to accessing services, provided counselling and assistance to families in crisis, and supported women and children escaping domestic violence. They were all registered charitable

organisations that often relied on unpaid volunteers to deliver services. These organisations were representative of the types of services that human and social service non-profit organisations deliver (Lyons, 2020; Productivity Commission, 2010).

Introduction to methodology

The ontological foundation upon which this research was based is that there is not one single truth when it comes to social circumstances and social interactions among humans (Bryman, 2012; Schwandt, 2000). In regards to epistemology, this research accepted the assumptions of interpretivism and was based on the understanding that humans have multiple realities. It acknowledged that researchers cannot be separated from the process or from the people with whom the research is being undertaken because researchers are always embedded within their own background of beliefs, practices, and traditions (Schwandt, 2007). Therefore, interpreting, understanding, and making judgements about each other's behaviours and experiences were key features of this research as participants and I co-created knowledge about interpersonal interactions through interpretation (Benner, 2008; Denzin, 2001). Qualitative methods were determined to be the best way to jointly generate detailed and nuanced characteristics about evaluation champions with participants, their colleagues, and evaluators (Denzin & Lincoln, 2005). This research sought to explore the underlying feelings about evaluation as experienced by participants and placed emphasis on understanding the ways in which they interpreted their social interactions (Bryman, 2012). However, while this research was based on jointly creating and interpreting the findings with participants, there was value in examining if the discoveries fitted within a larger body of evidence; this research drew upon formal theory to help with understanding the social situation and interpersonal interactions occurring among people working in organisations (Gay & Weaver, 2011).

Organisation of the thesis

This thesis has seven chapters with accompanying appendices. Chapter 1 has provided background about evaluation in the non-profit sector and justified why individuals who champion evaluation in organisations are worthy of further research. Chapter 2 draws on the extant literature and a social psychological theory to develop a proposed definition of an evaluation champion. Chapter 3 provides additional detail about the methodology and methods to illustrate the research design for identifying evaluation champions and engaging with participants to assess the relevance of the proposed definition. Chapter 4 presents the findings from the individual participants and shares detailed examples that illustrate their activities, strategies, motivations, and attributes. Chapter 5 presents the findings from the case studies with a focus on the perspectives of colleagues and the evaluators who worked alongside participants. Chapter 6 draws together the findings with literature and theory to argue that *evaluation advocate* is a more appropriate descriptor than *evaluation champion* when attempting to effectively structure cooperative teamwork to achieve common goals in competitive organisational environments. Chapter 7 outlines the recommendations, conclusions, and suggestions for further research.

CHAPTER 2 – LITERATURE REVIEW

This chapter refers to the extant literature to argue the need to further investigate evaluation champions as a pathway to increasing the uptake of evaluation in non-profit organisations. I begin by outlining the literature on champions from the business, health, and environment sectors, and positive organisational scholarship. The chapter then highlights the studies that mention evaluation champions and the small amount of research undertaken specifically on evaluation champions. I then combine the background literature on champions to propose a definition of an evaluation champion. The theoretical framework section explicates how this research also used a formal social psychological theory to understand champions in relation to teamwork. The chapter then combines the literature and theory into a conceptual framework to articulate the concepts that guided the research design. It concludes with a justification for why conducting research on evaluation champions was a worthwhile pursuit and re-states the research questions.

As documented in the preface, in 2018 the *Journal of MultiDisciplinary Evaluation* published components of this literature review (Rogers & Gullickson, 2018). This chapter combines material from the article with additional references and situates the research within a theoretical framework. Appendix A contains an overview of the literature review methodology.

Champions

Over 50 years ago Schön (1963) studied emergent leaders in relation to innovation in organisations and stated, “Where radical innovation is concerned, the emergence of a champion is required. Given the underground resistance to change the new idea either finds a champion *or dies*” (p. 84, emphasis in original). In an interview with Fulmer and Keys (1998), Senge similarly supports this concept from an organisational learning perspective: “We have found that committed champions are almost essential for any type of organizational transformation” (p. 40). Following

Schön's (1963) identification of the champion as a concept, the health, education, environment, and business sectors have made reference when adopting a new organisational philosophy, technology, program, or process (Benton et al., 2020; Coakes & Smith, 2007; Gattiker & Carter, 2010; Goodman & Steckler, 1989; Rogers, 2002; Scheirer, 2005; Solitander, Fougère, Sobczak, & Herlin, 2012). Across the organisational development literature, other terms for champions include emergent leaders, change agents, opinion leaders, advocates, or policy entrepreneurs (Flodgren et al., 2019; Greenhalgh et al., 2004; Howell, 2005; Markham, 1998; Taylor et al., 2011)**.** This section will examine the literature on champions from the business, health, and environment sectors, as well as positive organisational scholarship, to investigate how champions influence others. It concludes with a table that summarises the attributes of champions from these sources.

Champions in the business sector

A significant product innovation research project by Howell et al. (2005) designated three core personality factors when validating measures of champion behaviour. These included: "expressing enthusiasm and confidence about the success of the innovation, persisting under adversity, and getting the right people involved" (Howell et al., 2005, p. 118). Champions have been found to influence others through their multiple social networks because they are held in high esteem by their co-workers (Coakes & Smith, 2007). Being able to tailor communication styles depending upon who the champion is engaging with is another factor. Howell (2005) gives an astute example of how an exemplary champion in a business setting communicates in the workplace:

> Vincent adapted his selling approach to suit different audiences. He claimed that the most effective way to get people on board when promoting an innovation was to "understand what people need to hear and give them the information in the form that they can process in a way that is useful for them"…. More effective champions were high self-monitors who displayed flexibility in framing ideas in ways that were most appropriate for their audience…. As another effective champion said, "You just have to really read people and see what is the

best way to getting them to buy into it and if it doesn't work, then you have to try something else with them." (pp. 109-114)

In the business sector, they are likened to entrepreneurs who operate within a business, rather than independently. They go beyond their role description to seek out, support, promote, spread, and progress new ideas across an organisation (De Clercq & Belausteguigoitia, 2021; De Clercq & Pereira, 2020; Kriz et al., 2013; Molloy et al., 2020). Warrick (2009) considers an investment in champions to be essential for initiating, facilitating, implementing, and managing organisational change. Guidelines for training, developing, and using change champions were developed from that research. Warrick (2009) suggests the title of change champion should refer only to those who have received training as a way of formally distinguishing them from people who have inherent skills in championing change. He supports training to manage the implications of a change process for all key employees throughout the organisation, not just training for leaders in senior-level positions (Warrick, 2009).

A recent research paper investigated the role of value champions in business markets by summarising the business literature (Keränen & Liozu, 2019). They focused on the characteristics and implications of formal, stable, and team-based championing approaches. Their future research agenda resonates strongly with the aims of this research: "Antecedents, contingencies, and outcomes of value championing; Requirements and implications of specific value championing approaches; Individual characteristics and personality traits of value champions; Transformation journeys towards value champions" (Keränen & Liozu, 2020, p. 95). The Keränen and Liozu (2020) research is one example of a number of studies that offer insights into the personal motivations of champions in the innovation and business sectors. Many of these recent publications indicate the need and value of exploring this topic in greater depth (De Clercq & Belausteguigoitia, 2021; De Clercq & Pereira, 2020; Keränen & Liozu, 2020; Larsson, 2020; Molloy et al., 2020; Pinto & Patanakul, 2015; Rast et al., 2016; Simon, 2009).

Champions in the health sector

An early example of a champion in the health literature comes from Goodman and Steckler (1989), who investigated models for ensuring the longevity of health promotion programs. They found a program champion was the organisational equivalent of a marriage broker as they formed coalitions among people involved. Goodman and Steckler (1989) stated, "The effective program champion was able to cultivate, unify, and link the divergent aspirations of various people in the interest of the program" (p. 73). Since then, many positive health care changes have been attributed to champions because of their role in initiating, developing, and implementing new innovations and supporting networks (Greenhalgh et al., 2004; Rogers et al., 2018; Shaw et al., 2012; Van Steirteghem et al., 2019).

A literature review of health information technology champions determined that these individuals could be either in administrative, technical, or formal leadership positions and have come from a variety of different career paths (Shea & Belden, 2016). The authors also found they could be emergent champions or appointed to a position. The identified combinations of personality characteristics that described champions included "achievement… persuasiveness… persistence… innovativeness… charisma… enthusiasm… assertiveness… risk-tolerance" (Shea & Belden, 2016, p. 4). This review strongly resonates with a more recent study conducted by Demes et al. (2020) that investigated stakeholders' perceptions of champions facilitating successful quality improvement programs. Some of the characteristics identified in their research included: "communication… persuasion… dedication… motivation… ability to inspire" (Demes et al., 2020, p. 1).

Champions in the environment sector

The *champion phenomenon* refers to "the emergence of a champion who is effective at driving a leadership process to effect change" according to research undertaken in the Australian water industry (Taylor et al., 2011, p. 413). The research used findings from case studies in six organisations to develop a model of champion-driven leadership, to explain the different dimensions

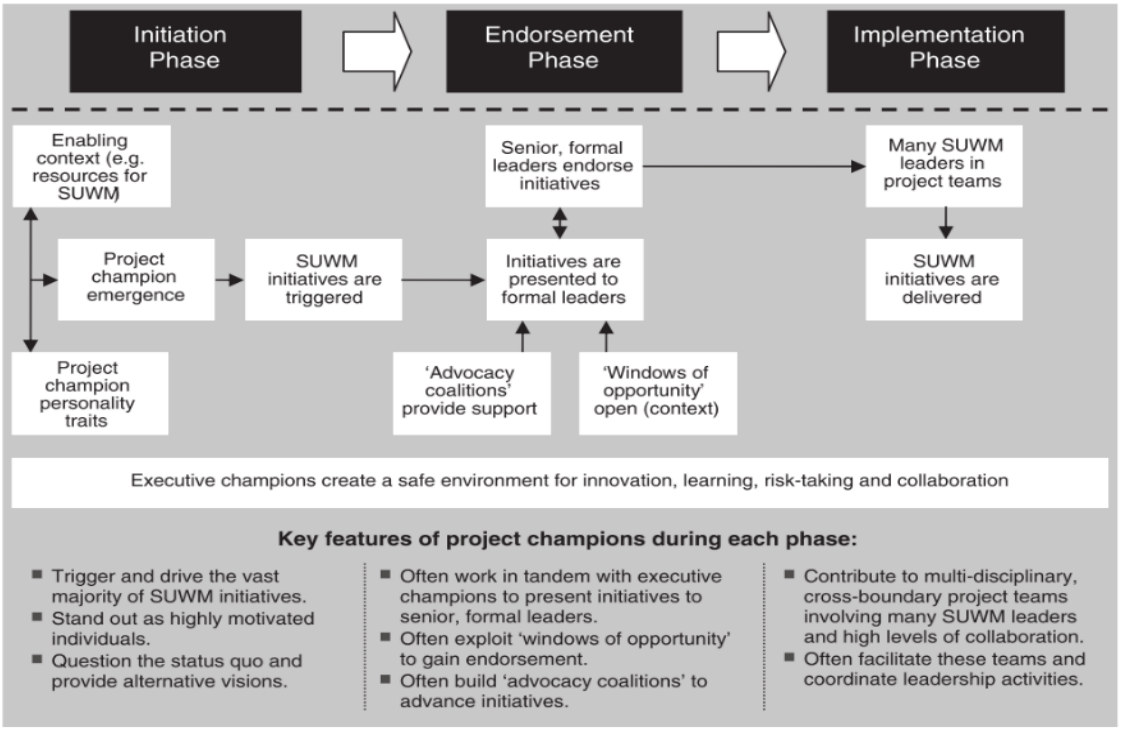
of leadership, and to highlight implications for management for building and using champions (Taylor et al., 2011). Taylor et al. (2012) make a distinction between an executive champion and a project champion. The executive champion is at a senior level and has access to power, coming from their organisational position, that enables them to influence others and access and direct resources. Although not involved with promoting the project on a daily basis, executive champions can create enabling environments, manage the organisational culture, secure resources, and garner political support. In Taylor et al.'s (2011) research they define project champions as

> A person who acts as a change agent to promote SUWM [sustainable urban water management] on a daily basis within the agency or broader institution, particularly early in the process of change. They exhibit a strong personal commitment to the issue, as well as confidence, enthusiasm and persistence. They are adept at exercising influence, usually through informal sources of power. They also adopt specific behaviors (e.g. identifying, packaging and selling issues as well as building coalitions of support), many of which occur outside of their official role description. (p. 417)

Figure 1 is included to highlight how the personality traits were found to be important during the initiation phase and to also note that the champions employed different features during each phase.

Figure 1

A Model of Leadership Driven by Champions Promoting Sustainable Water Management (Taylor et al., 2011, p. 421)



Taylor et al. (2011) developed a list of behaviours used by project champions during a typical process, but noted that not all champions worked effectively across each phase. This was based on group and individual interviews and a questionnaire with a focus on the behaviours that distinguished effective champions. Taylor et al. (2011) noted: "Keys to champion success included their ability to build strategic social networks, work in tandem with executive champions, and learn from experienced mentors how to drive change in their local context" (p. 422). They found champions can emerge at any level of an organisation because it is not their position or role that enables them to influence others, rather it is their personality characteristics and an alignment between their values and the issues requiring leadership (Taylor et al., 2012).

Champions in positive organisational scholarship

Positive organisational scholars Bateman and Porath (2003) associate champions with *transcendent behaviour*, which is defined as "self-determined behavior that overrides constraining personal or environmental factors and effects extraordinary (positive) change" (p. 122). This is supported by Spreitzer and Sonenshein (2003), who also believe individuals have the capacity and potential to lay the foundations for positive organisational development, stating, "Transformational leaders bring deep change to their organizations by elevating their followers' interest, stirring them to look beyond their own self-interest for the good of others" (p. 219). Through self-monitoring, reflexivity, and thinking about their own knowledge, champions in other settings have provided insight into how to navigate through challenging multiple relationships and interpersonal interactions (Howell, 2005; Klafehn et al., 2013).

Research from the perspective of change management champions who incorporated emotional intelligence profiling found they are motivated by the self-driven belief that the desired change will be beneficial for the organisation, and their reward is team success (Chrusciel, 2008). These individuals believe they will increase their personal value and respect by being a team player who supports the group to accomplish its goals. High levels of common sense and human and social capital were found to be important for effective change champions as well as being politically and interpersonally capable, acceptable to the team, credible, and flexible (Chrusciel, 2008). Champions, who commit early, take on key roles, influence others, and maintain high levels of momentum for change over time, can be delineated from converts, defectors, and doubter individuals, who all have varying degrees of tolerance for change during the course of an initiative (Jansen et al., 2016). Early commitment to change by a champion enables more opportunities to access information through frequent exposure to other leaders. This can therefore lead to more positive momentum, ongoing progress, and further involvement compared with other individuals who delay or resist change (Jansen et al., 2016).

In summary, the literature examined in this section, from the business, health, environment sectors, and positive organisational scholarship, assists with understanding how champions have the power or influence to support change. A common theme was that champions can influence others through personal power no matter where they are on the organisational hierarchy (Hyde, 2018; Taylor et al., 2012) Thereby, this research refers to power in the broadest possible sense to encompass "hierarchical position, access to resources, technical expertise, and/or centrality in a sociometric network of information" (Day, 1994, p. 150). Similarly, the research uses a broad definition of a leader, i.e., "an individual in a group who exerts the greatest influence on other members" (Johnson & Johnson, 2014a, p. 213). When discussing the findings, Chapter 6 specifically refers to forms of power and types of leadership. Table 1 concludes this section by summarising the attributes of champions from research on environmental, business, health champions, and positive organisational scholarship.

Table 1

Summary of Attributes of Champions from the Business, Health, Environment Sectors, and Positive Organisational Scholarship

Business / innovation champions (Howell et al., 2005, p. 649).	Health champions (Shea & Belden, 2016, pp. 4-12; Demes et al., 2020, p. 1).	Environmental champions (Taylor, 2010, p. 12).	Positive organisational scholarship (Bateman & Porath, 2003, pp. 122-137; Spreitzer & Sonenshein, 2003, pp. 207-224).
Knowledge			
	Encourage learning.	Openness to experience.	Rationality and mindfulness both employ the skills, abilities, and practices that overcome inhibitory biases and provide fuller and more proper use of information.
Gets problems into the hands of those who can solve them.		Innovative. Accurately reading institutional landscapes (including politics and social networks).	Knowing oneself and the limits of one's own knowledge. Personal efficacy.
		Questioning the status quo.	
		Excellent strategic and relational knowledge of the institutional environment. Good general knowledge of methods.	
		Analysing information. Using a wide variety of influence tactics to suit the context. Brokering knowledge.	

Business / innovation champions (Howell et al., 2005, p. 649).	Health champions (Shea & Belden, 2016, pp. 4-12; Demes et al., 2020, p. 1).	Environmental champions (Taylor, 2010, p. 12).	Positive organisational scholarship (Bateman & Porath, 2003, pp. 122-137; Spreitzer & Sonenshein, 2003, pp. 207-224).
Skills			
Continues to be involved with the innovation until it is implemented.	Uses friendliness and ingratiation. Applying sanctions. Horizontal and collective leadership style. Ability to inspire and motivate people.	Transformational leadership skills. Providing inspiration and motivation to colleagues. Coordinating distributed leadership within groups.	Elevating their followers' interest, stirring them to look beyond their own self-interest interest for the good of others. Deep caring that what people are doing matters to them in important ways. Transformational leadership.
Gets the right people involved. Gets key decision makers involved.	Building coalitions. Appealing to higher authority.	Identifying influence opportunities. Building and sustaining social networks and coalitions of support. Gathering political and managerial support.	Organizational citizenship behaviors, will lead to greater centrality in organizational networks, with its attendant benefits (information, knowledge), as well as to trust, reciprocity, and cooperation.
	Presenting rational arguments. Persuasiveness. Communication and persuasion.	Communicating clearly and frequently. Facilitating and negotiating. Using scanning and framing behaviours.	
Expresses confidence in what the innovation can do.	Engaging in workflow redesign. Assertiveness.	Aligning resources with this vision. Establishing pilot projects. Selecting the most appropriate set, sequence, and timing of influence tactics to suit the context.	
	Individualized consideration. Humility. Empathy.	Seeing an issue from many perspectives. Resolving conflict.	Being other-focused enhances interpersonal facilitation, including cooperative helping behaviours and human social capital.

Business / innovation champions (Howell et al., 2005, p. 649).	Health champions (Shea & Belden, 2016, pp. 4-12; Demes et al., 2020, p. 1).	Environmental champions (Taylor, 2010, p. 12).	Positive organisational scholarship (Bateman & Porath, 2003, pp. 122-137; Spreitzer & Sonenshein, 2003, pp. 207-224).
Attitudes			
Shows optimism about the success of the innovation.			
Expresses strong conviction about the innovation. Shows tenacity in overcoming obstacles. Persists in the face of adversity. Knocks down barriers to the innovation.	Dedication.	Persistence, commitment, and focus. Persevering despite opposition. Extraversion – conscientiousness.	Generating alternative backup strategies if needed.
Enthusiastically promotes the innovation's advantages.	Motivation. Enthusiasm. Charisma.	Motivation and determination. Enthusiasm and energy. Propensity to engage in extra-role behaviours.	Self-determination.
Does not give up when others say it cannot be done.	Intellectually stimulating other organizational members. Innovativeness. Overcoming technical challenges. Risk-tolerance. Go-ahead type.	Questioning the status quo. Risk-taking and tolerance to uncertainty.	Courage is a willingness to confront risk to do what one thinks is right.
Points out reasons why the innovation will succeed.	Have a vision.	Vision and a strategic perspective. Accurately reading institutional landscapes.	
Keeps pushing enthusiastically. Sticks with it.	Assertive actions. Achievement. Proactivity.		Structuring and weighing life goals, handling life conflicts and life decisions.

Evaluation champions

Organisations use evaluation in highly divergent and wide-ranging ways (Gill, 2010). However, as Chapter 1 previously stated, many researchers mention the importance of evaluation champions (Chaudhary et al., 2020; King & Volkov, 2005; Labin, 2014; Preskill & Boyle, 2008a, 2008b). Numerous researchers highlight the importance of identifying and engaging champions during the implementation of an evaluation initiative (Bourgeois, Whynot, & Thériault, 2015; Brandon, Smith, & Hwalek, 2011; Guerra-López & Hicks, 2015; Mackay, 2002; Mayne, 2010; Nielsen, Lemire, & Skov, 2011; Wandersman, 2014). This section of the chapter first summarises the extant research that mentions *evaluation champions*. It begins with the earliest reference, proceeds through to the latest articles, before noting where the term has also appeared in the grey literature. The second part provides details around research that has focused specifically on evaluation champions. It examines two studies of which evaluation champions were a focus and then explores the one qualitative study that I found to solely investigate evaluation champions. The section concludes with a table summarising the attributes of champions from the qualitative study and links to Appendix B that provides an overview of the key articles that reference champions based on Rogers and Gullickson (2008).

Studies mentioning evaluation champions

To support evaluative inquiry, Preskill and Torres (1998) made an early reference to evaluation champions when they suggested that to promote ongoing learning executive leaders should: "(a) develop and communicate a consistent learning vision and (b) model and champion learning efforts" (p. 162). Subsequently in 2002, the journal *New Directions for Evaluation* released a special edition focusing on evaluation capacity building, and three out of seven articles mentioned executive or senior-level champions. Champions at a senior level were identified as crucial individuals who could facilitate and manage the process of building evaluation capacity (Stockdill et al., 2002). Milstein, Chapel, Wetterhall, and Cotton (2002) recommended designating an

organisational lead or champion to be responsible for promoting evaluation across the organisation. In an action plan for building capacity Mackay (2002) suggested that a strong champion was needed to "push hard for ECB [evaluation capacity building] to happen and to keep pushing hard until it has become embedded in the corporate culture" (p. 96). The pivotal role of the influential champion in cultivating awareness and demand for evaluation was highlighted in this case study where "having a senior champion who is closely attuned to emerging corporate priorities has been proved invaluable" (Mackay, 2002, p. 96).

From that point on researchers continued to make reference to champions and connected the concept with Patton's work on "the personal factor" (Patton, 1997, p. 44). McDonald, Rogers, and Kefford (2003) provide an example when they identified that evaluation champions were a success factor when building evaluation capability. They found that an evaluation champion could be relocated from one part of an organisation to another in order to influence other people. Their explanation noted: "Patton (1997: 44) has referred to 'the personal factor' in the success of individual evaluations – the presence of a champion for the evaluation. We believe the same factor applies to the building of capability" (McDonald et al., 2003, p. 13).

Descriptions of champions then began to emerge that referred to their positive attitude, open-mindedness, respectful interactions, enthusiasm, and humour (King, 2005, p. 93). King (2005) suggested: "Committee members would become evaluation champions, serving as visible supporters of the process, mentioning it in favorable terms, identifying issues for possible study, and taking on naysayers pleasantly but firmly" (King, 2005, p. 93). Evaluation champions appeared prominently in the steps outlining intentional process use for building evaluation capacity: "Identify and support evaluation champions who will nurture evaluative thinking in themselves and others… First, you must identify individuals who understand or intuitively get evaluation" (King, 2007, p. 49). Recommendations also included inviting champions on advisory groups so they could provide contextual background, assist with analysis and interpretation, and support the process of engaging

co-workers (King, 2007). To increase the likelihood of success around process use and enable evaluation to be embedded in the organisation, the champion's level of position was not considered by King (2007) to be as important as their level interest, motivation, engagement, commitment, enthusiasm, and evaluation skills and knowledge. Evaluation champions were emphasised as being important to "nurture evaluative thinking over time" (King, 2007, p. 53).

In their capacity building framework, Taylor-Powell and Boyd (2008) allocated evaluation champions to the *Resources and supports* component, which also includes expertise, materials, assets, financing, technology, and time (Taylor-Powell & Boyd, 2008, p. 58). They developed this framework by combining the King and Volkov (2005) model with their professional experience building capacity in a cooperative extension organisation. Figure 2 illustrates champions as an element under resources and supports.

Figure 2

An Evaluation Capacity Building Framework (Taylor-Powell & Boyd, 2008, p. 58)

Component	*Elements*
Professional development	• Training • Technical assistance • Collaborative evaluation projects • Mentoring and coaching • Communities of practice
Resources and supports	• Evaluation and ECB expertise • Evaluation materials • Evaluation champions • Organizational assets • Financing • Technology • Time
Organizational environment	• Leadership • Demand • Incentives • Structures • Policies and procedures

Not prescriptive regarding level on the organisational hierarchy and being open to self-selection or nomination by leadership, Taylor-Powell and Boyd (2008) recommended that evaluation champions

"must be continuously identified and nurtured to grow the evaluation culture and to withstand potential setbacks" (p. 61). They had an ability to influence others, brought a variety of skills, and had a capacity to learn. Taylor-Powell and Boyd (2008) stated, "We found that working with these individuals over time, cementing relationships, and encouraging reflective practice help to build a cadre of key advocates that can communicate the value of evaluation and share ECB [evaluation capacity building] responsibilities" (p. 61).

In search of conceptual clarity, some studies mentioned champions when attempting to develop common measures for evaluation capacity building. Although Nielsen et al. (2011) noted the importance of champions and multiple theorists referenced champions as a success factor, they decided not to include champions in their model. Nielsen et al. (2011) reasoned that "efforts of an evaluation champion result in the establishment of structures, processes and culture that form part of EC [evaluation capacity]" (p. 339), but they justified not including champions because "the presence of a champion is more a driver of change than representative of actual capacity" (p. 339). In contrast, champions are included as an organisational level outcome in Labin's (2014) Integrated Evaluation Capacity Building model. Champion appears under "leadership" and alongside "coaching, mentoring, level of support in organization" (Labin, 2014, p. 109).

In *Interactive Evaluation Practice*, King and Stevahn (2013) suggest that external evaluators make connections with evaluation champions to assist with gaining an understanding of the history and elucidating the interpersonal dynamics within an organisation. They understand these individuals to be: "well respected by colleagues who possess the expertise and skills necessary for supporting the tasks of evaluation or for championing processes" (King & Stevahn, 2013, p. 210). They list inclusivity and strategy as reasons for taking the time to identify evaluation champions during the early stages of an evaluation. King and Stevahn (2013) suggest that external evaluators consider the interpersonal factor and specifically mention evaluation champions:

> The interpersonal factor is critically important to external evaluators' ability to spot possibly problematic situations in a timely manner. They need to have active relationships with individuals in the organization to gain grounding knowledge and a detailed sense of the environment as well as an understanding of which leaders and evaluation champions support the study and which individuals may have problems with the evaluation or feel threatened as it moves forward. (p. 227)

Evaluation champions are consider by King and Stevahn (2013) to be a factor in determining the degree of organisational support for evaluation. Not related to their level on the hierarchy, evaluation champions are noted in conjunction with leadership support, degree of demand for evaluation information, and level of interest (King & Stevahn, 2013).

More recently, champions were also identified as important in studies that explored the enablers and barriers to developmental evaluation and embedding and sustaining evaluation capacity building (Chaudhary et al., 2020; Szijarto & Cousins, 2018; Wade & Kallemeyn, 2020). Regarding developmental evaluation, several roles for champions emerged: acting as brokers, providing reassurance about the value of evaluation, providing advice, supporting co-workers who were struggling, and interpreting local issues so evaluators could recognise changes in context. However, their most prominent role was in providing their recommendation for the developmental evaluation, which assured the funders and enabled the evaluation to proceed, illustrating the level of respect and influential power that champions can hold in an organisation (Szijarto & Cousins, 2018). To meet the challenge of building evaluation capacity, recent research suggested the need to identify and train individuals in the organisation, including administrators, so they understood the value of evaluation, had clear expectations, and could serve as champions to assist others with evaluation (Chaudhary et al., 2020). In a study by Wade and Kallemeyn (2020), evaluation champions were identified as a factor that supported sustainability of evaluation capacity building initiatives:

"Having an evaluation champion, somebody in a leadership position who valued, advocated, and took on evaluation responsibilities, was essential to facilitating and developing sustainability" (p. 5).

In the grey literature, frequent and recent references can be found that call for the identification of champions. A poster titled "Building a Culture of Evaluation - 30 Ideas to Apply to Your Organization" recommends identifying and recruiting evaluation champions (Community Solutions Planning and Evaluation, 2011). A radio interview about adaptive management with Smith (2017) reinforced the findings that champions can be found at different levels of an organisation and are in a position to embed evaluative thinking into their work:

> It matters who those champions are. I think it matters if you have members of leadership that are part of the champions, but also that you have a culture of people in the organisation, and people associated with that culture that buy into it, who are happy also to be champions of change at the practice level. So that when operational decisions, day-to-day, come across their bench, they can think, "What's the leadership saying? Would this work? How can I evaluate it?" These sorts of questions are constant, so absolutely champion, particularly leadership champions, but I think there are another level of, I don't know what you call it, "doer champions," people who are in the operational level of the organisation who are really passionate about what you are doing and keep to deliver. (Smith, 2017, 08:45)

The American Evaluation Association's blog providing a tip-a-day by and for evaluators uploaded a post that made this suggestion for an evaluation capacity building initiative for a military health evaluation:

> Identify a champion: Whether it is the program manager, staff person, or the organization's leader, find the key stakeholder(s) who understands that evaluation data are potent. Leverage their support to get others interested in creating a learning organization. (Hilton, 2019, p. 1)

These examples highlight the frequent use of the term and the ongoing importance of including these types of non-evaluators in evaluation initiatives.

Studies focusing on evaluation champions

As part of a case study, King and Volkov (2005) interviewed employees who had been involved in an evaluation and with individuals they identified as evaluation champions. The findings were used to develop a framework to build evaluation capacity. Evaluation champions were identified as a key component of the internal organisational context that would determine the feasibility of the approach. The champions were found to be distinct from executive leaders and in the valued and critical position of "voluntarily implementing evaluation activities and purposely passing their evaluative spirit and knowledge to their colleagues" (King & Volkov, 2005, p. 13).

Research exploring the motivations, strategies, and outcomes of building evaluation capacity in organisations conducted by Preskill and Boyle (2008b) involved interviewing evaluators and clients. In the "Lessons Learned" section of their findings, they did not include champions under the "Create interest, motivation, and buy-in" (p. 163) section, but alternatively chose to place the term under "Identify evaluation champions" (p. 165). Preskill and Boyle (2008b) stated:

> These champions may not be the titled leaders; instead, they might be members who have an interest in and energy for evaluation. Enlisting these people in motivating others to engage in evaluations, encouraging them to ask the critical questions, helping them implement and act on the evaluation findings, and providing support and resources for evaluation work are all ways in which internal champions can serve the evaluation capacity building effort. (p. 165)

Thereby, evaluation champions were recognised as necessary resources for supporting ongoing evaluation activity in Preskill and Boyle's (2008a) *Multidisciplinary Model for Evaluation Capacity Building*.

Only one known qualitative research project focused solely on evaluation champions, and its findings resonate with prior research. Silliman et al. (2016a, 2016b) conducted 40 semi-structured interviews with champions, nominated by evaluation specialists or administrators, to explore their roles, activities, and motivations. The researchers found that evaluation champions were advocates for evaluation, and, as practitioners, they assisted, mentored, supported, modelled, and indirectly influenced their co-workers to engage with evaluation (Silliman et al., 2016a). Advocacy was a key role as they spoke up, highlighted the value, and identified opportunities for the organisation to incorporate evaluation. They encouraged co-workers to "invest time, resources, and gain rewards from skill-building and practice in evaluation" (p. 9).

Silliman et al. (2016a) found that champions offered assistance and mentoring to co-workers, including sharing resources, planning, problem-solving, and reporting on findings (Silliman et al., 2016a). Champions gained some credibility from doing evaluation and using evaluation findings and assisted with developing their identity as educators and leaders (Silliman et al., 2016a). However, although the champions in Silliman et al.'s (2016a) research did participate in and lead some evaluation activities, they also had a more indirect way of influencing peers that was complementary to formal training or advice offered by evaluators. The champions were often in roles that promoted learning across the organisation and influenced long-term organisational development that incorporated evaluation (Silliman et al., 2016a). Silliman et al. (2016a) stated,

> Champions perform above organizational norms in evaluative thinking…. and use… They prioritize evaluation instrumental use for accountability and funding support, but also offer examples of process use to engage clients and partners, practical use to manage projects, and conceptual use of evaluation to educate stakeholders. (p. 13)

Champions understood that the purpose of incorporating evaluation was to improve their programs and effect change on the target audience of the programs. Regarding motivation, "champions' interest in evaluation is shaped by internal passion for their field and clientele"

(Silliman et al., 2016a, p. 14). Although motivation may have been initially related to external demands for evaluative information, subsequently their efforts were rewarded as they cultivated and deployed further skills and found ways to benefit the organisation (Silliman et al., 2016a). Table 2 summarises the attributes of champions from Silliman et al.'s (2016a) research by knowledge, skills, and attitudes. Appendix B, based on Rogers and Gullickson (2018), provides an overview of the key articles that reference champions and highlights a key quotation in each.

Table 2

Summary of Attributes of Evaluation Champions (Silliman et al., 2016a)

Evaluation champions (Silliman et al., 2016a, pp. 7–14).
Knowledge
In the process of improving how they practiced evaluation, champions developed a greater understanding. Skill practice was self-taught, trial-and-error, and punctuated by peer learning or working with an expert or mentor.
Evaluative thinking was evident in questions such as, "Which method fits what we want to know about this program?" Mentored by or worked closely with evaluation specialists.
Evaluative thinking as an extension of their personality, training, and/or programming experience. Rigorous thinking and management.
Seeking professional development resources. Self-directed learning.
Mastered existing evaluation tools. Searched for and utilized existing instruments. Interpreting the value of and opportunities for evaluation.
Skills
Vocal "cheerleaders." Practice emphasis incorporated thinking, initiating, measuring, and using data to add value to peers' or clients' learning. Mentoring and training. Assistance or long-term mentoring.
Engaging campus experts, community partners, and funders, and by working in project teams.
"Personal factor" for peers.
Talk about evaluation and more frequent actions as monitors, models, and mentors.
Attitudes
Persistence. Self-motivated. Self-generated motivation.
Passion for evaluative thinking and making a difference with people. Enthusiasm.
Engage and educate target audiences, staff, and funders about a program's purpose, potential, and impact. View the extra efforts or setbacks of each project in a long-term perspective.
Leading needs assessment, planning, monitoring, and reporting activities.

A proposed definition of an evaluation champion

This chapter so far, based on the literature, has suggested that evaluators value champions because they willingly incorporate evaluative thinking into their work and constructively promote evaluation among their co-workers. This section of the chapter now adds to that analysis by proposing a definition of an evaluation champion. It provides an overview of the process used to develop a definition in response to the challenge of: "How would I know an evaluation champion if I bumped into them on the street?" (Rogers & Gullickson, 2018, p. 56). To assist with developing a definition that could represent an evaluation champion, the research drew upon existing models of other roles that may have a similar function to champions. It compiled the characteristics of evaluative thinkers, internal evaluators, and evaluation capacity building practitioners from the literature (Rogers & Gullickson, 2018). The proposed definition formed the basis of this research to find out if this representation resonated with individuals working in organisations.

The first step examined Buckley, Archibald, Hargraves, and Trochim's (2015) list of strategies and activities for promoting evaluative thinking. Buckley et al. (2015) stated, "If Evaluative Thinking is promoted by an evaluation champion in a position of influence and is increasingly practiced by members of the organization as part of a learning community, an evaluation culture will follow" (p. 383). These concepts and teaching strategies were a useful starting point as they were drawn directly from research on the teaching of critical thinking, but contextualised by considering application to an evaluation capacity building approach (Buckley et al., 2015). The next step incorporated the comparison that Stockdill et al. (2002) made between the role orientation of a program evaluation practitioner with that of an evaluation capacity building practitioner. To understand more about evaluation champions, I found it useful to distinguish between an evaluator and the role of building evaluation capacity. The process then involved incorporating a model of an internal evaluator (Volkov, 2011). Based on the literature and personal experience, Volkov (2011) outlined the essential roles: change agent, educator about evaluation, evaluation capacity building

practitioner, decision-making supporter, consultant, researcher, advocate, and organisational learning supporter (p. 38).

As detailed in Rogers and Gullickson (2018), these frameworks were then subsequently compared with the limited data available that specifically focused on evaluation champions. Silliman et al. (2016a) highlighted the key roles of champions that came from interviews with champions based in extension organisations. The process drew upon key paragraphs on champions in the Preskill and Boyle (2008b) research that highlighted the importance of identifying evaluation champions. The King and Volkov (2005) and King (2005, 2007) articles also provided some useful reference points for understanding what to look for in an evaluation champion. The only source that came from beyond the evaluation literature was the conceptual model of champion-driven leadership from Taylor et al. (2011), which was included because of the depth of detail and specificity in the descriptions of the characteristics of a champion. Table 3 collates the references and groups them into activities based on Rogers and Gullickson (2018, p. 57).

Table 3

Activities Indicative of Evaluation Champions (Based on Rogers and Gullickson, 2018, p. 57)

Activities	Buckley et al., 2015, p. 382.	Stockdill et al., 2002, p. 12.	Preskill and Boyle, 2008, pp. 165-166.	King and Volkov, 2005; King, 2005; King, 2007.	Silliman et al., 2016a , pp. 7-14.	Volkov, 2011, p. 38.	Taylor et al., 2011, p. 422.
Advocacy for support and resources.		Orients outward toward co-creating and co-sustaining the necessary state of affairs for program studies and their uses.			Advocacy included "speaking up" in policy groups… interpreting the value of and opportunities for evaluation to peers, especially in mentoring, project teams, and professional settings. Most persistently reminded administrators, advisory groups, project teams, professional groups, individual coworkers or supervisees to invest time, resources, and gain rewards from skill-building and practice in evaluation.	Advocate	Strongly promoting new ideas (e.g. communicating clearly and frequently across organizational boundaries). Building and using relationships with executives and politicians to gain their support. Building compelling cases for initiatives, which are presented to senior decision makers.

Activities	Buckley et al., 2015, p. 382.	Stockdill et al., 2002, p. 12.	Preskill and Boyle, 2008, pp. 165-166.	King and Volkov, 2005; King, 2005; King, 2007.	Silliman et al., 2016a , pp. 7-14.	Volkov, 2011, p. 38.	Taylor et al., 2011, p. 422.
Motivate others and provide energy, interest, and enthusiasm.		Imagines, conceptualizes, envisions, co-creates, and co-sustains a state of affairs in which evaluation and its use is ongoing.	Motivating others to engage in evaluations.	Their positive attitudes toward evaluation, their open-mindedness when challenged, their respect for colleagues' opinions, their enthusiasm for risk taking and creativity, and a continuing sense of good humor (King, 2005, p. 93). Interest in the evaluation process, motivation to participate, and previous evaluation training and education (Preskill, Zuckerman & Matthews, 2000, cited in King, 2007, p. 50).	Champions' own role descriptions more often fit the pattern of i*ndirect influence* which complements expert evaluators' more *direct and intentional* use of process in intensive training and consulting.	Educator about evaluation.	Demonstrating many attributes that relate to transformational leadership (e.g. frequent displays of enthusiasm, energy, vision, confidence, persistence, and optimism). Forming and managing cross-boundary, multi-disciplinary teams to deliver complex SUWM projects. Being highly collaborative and taking enjoyment from working with others.

Activities	Buckley et al., 2015, p. 382.	Stockdill et al., 2002, p. 12.	Preskill and Boyle, 2008, pp. 165-166.	King and Volkov, 2005; King, 2005; King, 2007.	Silliman et al., 2016a , pp. 7-14.	Volkov, 2011, p. 38.	Taylor et al., 2011, p. 422.
Provide or access tools, resources, networks, and expertise.		Co-designs and makes ordinary the everyday practices necessary to sustain the state of affairs and to support each, every, and all discrete evaluation studies and their uses. May belong to multiple occupational communities, including evaluators, managers, and executives.	Provide support and resources for evaluation work.	Evaluation champions who will supply ongoing commitment, enthusiasm, and technical know-how (King, 2007, p. 50).	Most persistently reminded administrators, advisory groups, project teams, professional groups, individual co-workers, or supervisees to invest time, resources, and gain rewards from skill-building and practice in evaluation. Give-and-take in skill learning, practice, and mutual support… building on basic knowledge gained in formal settings.	Consultant. Researcher.	Using social networks to build coalitions of support that cross organizational boundaries, with a preference for the 'strong tie strategy' of social networking. Building and using strong operational, personal and strategic social networks. Getting the right people involved with SUWM projects at the right time, including experts from outside the organization to foster innovation.

Activities	Buckley et al., 2015, p. 382.	Stockdill et al., 2002, p. 12.	Preskill and Boyle, 2008, pp. 165-166.	King and Volkov, 2005; King, 2005; King, 2007.	Silliman et al., 2016a , pp. 7-14.	Volkov, 2011, p. 38.	Taylor et al., 2011, p. 422.
Help others to apply evaluative thinking, use evaluation findings, and create opportunities for reflection.	Create an intentional evaluative thinking learning environment. Display logic models in the workplace. Create public spaces to record and display questions and assumptions. Post inspirational questions. Highlight the learning that comes from successful programs and evaluations and also from ‘‘failures’’ or dead ends.	Uses a long-term, open-ended process for making the organization or program a place in which program evaluation as such and each program evaluation study can be used to enhance organizational effectiveness.	Helping others implement and act on the evaluation findings.	People who are willing to spend time with you discussing options, thinking about how to involve others, and eventually making sense of data (King, 2007, p. 49).	Champions perform above organizational norms in evaluative thinking… and use... They prioritize evaluation instrumental use for accountability and funding support, but also offer examples of process use to engage clients and partners, practical use to manage projects, and conceptual use of evaluation to educate stakeholders.	Decision-making supporter. Organizational learning supporter.	Establishing pilot projects to trial innovations, learn, minimize risks, educate stakeholders, and build coalitions. Coordinating leadership activities across organizational boundaries and managerial levels to ensure collaborators share common visions for SUWM initiatives.

Activities	Buckley et al., 2015, p. 382.	Stockdill et al., 2002, p. 12.	Preskill and Boyle, 2008, pp. 165-166.	King and Volkov, 2005; King, 2005; King, 2007.	Silliman et al., 2016a , pp. 7-14.	Volkov, 2011, p. 38.	Taylor et al., 2011, p. 422.
Assist, train, mentor, support evaluation while considering different perspectives, and encouraging others to contribute.	Ensure that all evaluation work is participatory and that members of the organization at all levels are offered the opportunity to contribute their perspectives. Encourage members of the organization to engage in informal, self-guided evaluation work. Access tools and resources. Use role-play. Conduct a scenario analysis. Take on various stakeholder perspectives. Conduct an evaluation simulation.			Committee members would become evaluation champions, serving as visible supporters of the process, mentioning it in favorable terms, identifying issues for possible study, and taking on naysayers pleasantly but firmly (King, 2005, p. 93).	Based on their reputation and enthusiasm for doing evaluation well, champions offer assistance or long-term mentoring to co-workers or supervisees, sharing tools, help with planning, problem-solving, or reporting. Promoted or provided training. Simultaneously, doing and using the evaluation process seems to enhance champions' identity as educators and leaders and understanding of evaluation as a means to improve programs and make a difference in the lives of peers and program participants.	Evaluation capacity building Practitioner.	Fostering trust among colleagues, as a prerequisite for high levels of collaboration. Demonstrating strong inter-personal skills via activities such as active listening, social networking, a preference for face-to-face and one-to-one communication, counselling, mentoring, coaching, negotiation, and conflict resolution.

Activities	Buckley et al., 2015, p. 382.	Stockdill et al., 2002, p. 12.	Preskill and Boyle, 2008, pp. 165-166.	King and Volkov, 2005; King, 2005; King, 2007.	Silliman et al., 2016a , pp. 7-14.	Volkov, 2011, p. 38.	Taylor et al., 2011, p. 422.
Consider how evaluation can be strategically promoted and used for organisational change.		Holds a perspective on how every evaluation may contribute to sustaining the necessary state of affairs and works strategically to those ends. Orients to a politics of guiding and sustaining organizational change, learning, and development.		Voluntarily implementing evaluation activities and purposely passing their evaluative spirit and knowledge to their colleagues (King & Volkov, 2005 p. 13).	Advocacy for client or peer learning and program improvement points to champions' influence on deeper, longer-term foundations of program development.	Change agent. Decision-making supporter.	Working in tandem with executive champions to use windows of opportunity to gain endorsement for initiatives. Learning from experienced mentors and executive champions how to build: strong strategic networks; political, strategic and relational knowledge; and various forms of power.

Activities	Buckley et al., 2015, p. 382.	Stockdill et al., 2002, p. 12.	Preskill and Boyle, 2008, pp. 165-166.	King and Volkov, 2005; King, 2005; King, 2007.	Silliman et al., 2016a , pp. 7-14.	Volkov, 2011, p. 38.	Taylor et al., 2011, p. 422.
Ask and encourage others to ask critical questions and initiate discussions and debates.	Schedule meetings focused on evaluative thinking practice. ''Mine'' logic models for information about assumptions and how to focus evaluation work. Use ''opening questions.'' Engage in critical debate on a neutral topic. Conduct a media critique. Engage in supportive, critical peer review. Take an appreciative pause.		Encouraging others to ask the critical questions.			Organisational learning supporter. Decision-making supporter.	Undertaking scanning behaviours. Questioning the status quo. Generating new ideas.

Activities	Buckley et al., 2015, p. 382.	Stockdill et al., 2002, p. 12.	Preskill and Boyle, 2008, pp. 165-166.	King and Volkov, 2005; King, 2005; King, 2007.	Silliman et al., 2016a , pp. 7-14.	Volkov, 2011, p. 38.	Taylor et al., 2011, p. 422.
Develop engaging ways to explain details and develop common visions.	Diagram or illustrate thinking with colleagues. Have teams or groups create logic and pathway models. Diagram the program's history. Create a system, context, and/or org diagram.				Most mastered existing evaluation tools, especially surveys, but also used checklists, journals or log-books, interviews and focus groups, concept maps, observations, and testimonials.	Evaluation capacity building Practitioner.	Developing and communicating visions for initiatives.

Based on the literature, this chapter proposes a definition of an evaluation champion as "an employee who practises reflection and critical thinking, and promotes evaluation among colleagues" (Rogers & Gullickson, 2018, p. 55). An indicative list of the activities an evaluation champion might undertake include:

- Advocate for support and resources
- Motivate others and provide energy, interest, and enthusiasm
- Provide or access tools, resources, networks, and expertise
- Help others to apply evaluative thinking, use evaluation findings, and create opportunities for reflection
- Assist, train, mentor, support evaluation while considering different perspectives, and encouraging others to contribute
- Consider how evaluation can be strategically promoted and used for organisational change
- Ask and encourage others to ask critical questions and initiate discussions and debates
- Develop engaging ways to explain details and develop common visions (Rogers & Gullickson, 2018, p. 55)

The final step in the process to define an evaluation champion considered these indicative activities in relation to formal theory, which was useful for examining peer interactions. Formal theory assisted with understanding evaluation champions through investigating their features and qualities in regards to working in a team. The next section provides the rationale for why I used a social psychological theory to explore how champions may be working with their peers and establish whether they employ intentional actions to give their teams purpose (Tindale & Anderson, 2002).

Theoretical framework

Organisational change and adult learning theories are useful for understanding how learning and change in relation to evaluation occurs in a workplace (Argyris & Schön, 1978; Preskill & Boyle, 2008a; Rogers, 2002). Collaborative Evaluation (O'Sullivan, 2012), Empowerment Evaluation (Fetterman & Wandersman, 2007), Participatory Evaluation (Cousins & Chouinard, 2012) and Utilization-Focused Evaluation (Patton, 2008) approaches are also useful for considering interpersonal dynamics around evaluation. However, for this research I drew upon Interactive Evaluation Practice because it explicitly considers interpersonal interactions (King & Stevahn, 2013).

Interactive Evaluation Practice is supported by the empirically validated theory of social interdependence (King & Stevahn, 2013). The theory was useful for application in this research as it assisted with determining the degree of cooperation and understanding how evaluation champions structure evaluation tasks. It also assisted with identifying how they promote mutually beneficial goals, and support, and maintain productive relationships while implementing evaluative initiatives, facilitating interactions, and managing conflict (King & Stevahn, 2013; Stevahn & King, 2005, 2016; Tarricone & Luca, 2002). This section articulates the theoretical framework in detail by demonstrating alignment with the methodological frame, describing the theory, specifying how the elements of the theory related to the indicative activities of champions, and detailing how the components of the theory were used in a conceptual framework that guided the research.

In alignment with the methodological frame, this research took an interpretive approach to theory, which meant developing and borrowing a theory and using it, in collaboration with participants, to look for discrepancies and alternative ways of making sense. Croucher (2016) explains how interpretivists use theory: "The purpose of theory is to better understand or explore different meanings within/about social phenomena" (p. 27). The literature suggests that evaluation practice can be strengthened by considering theory from social psychology to examine the challenges around supporting interactions and cultivating trust (Mark et al., 2011).

Specifically, this research drew upon social interdependence theory to assist with determining how, in relation to evaluation in organisations, the goals and actions influence team dynamics and the group members make meaningful connections (Johnson & Johnson, 2003b). The thesis uses *group* interchangeably with *team;* it includes the nature of groups, behaviour in groups, how groups develop, and interrelations among individuals and groups, and defines them as "a collection of individuals who are trying to satisfy some personal need through their joint association" (Johnson & Johnson, 2014, p. 7). Originally developed through the tradition of social psychology, social interdependence theory can be useful for understanding groups, teamwork, interpersonal dynamics, and changes over time (Tarricone & Luca, 2002; Tindale & Anderson, 2002). This theory is demonstrably robust based on the amount of research (over 750 studies conducted over a century), the extensive application by researchers to practical situations, and the strong empirical relationship between team functionality and success (Johnson, 2003; Johnson & Johnson, 2005; Tarricone & Luca, 2002).

A description of social interdependence theory

The theory is founded on the concept of interdependence; group members are connected, all members have influence, common goals are a means of connection, and group members can be motivated by moving towards accomplishing the goal (Lewin, 1935, 1948 cited in Johnson & Johnson, 2009). Deutsch (2011) further proposed that cooperation and competition were the essential tenets of the theory; positive interdependence occurs when individuals believe goal success is only possible by working with others, and negative interdependence occurs when an individual succeeds only if others fail. Cooperation occurs when individuals trust, support, and assist each other, have strong relationships, and work well together to succeed at their tasks; they are not just working alongside each other, but effectively working together to achieve their desired outcomes (Tjosvold et al., 2003). While cooperation encapsulates sentiments such as "we are for

each other" and "we benefit one another," competition denotes negative responses such as "we are against one another" and "you are out to harm me" (Deutsch, 2011, p. 25).

Social interdependence theory extends the theory of cooperation and competition (Deutsch, 2011; Johnson, 2003; Johnson & Johnson, 1989). Social interdependence occurs when team members have mutual ambitions and when the consequences for an individual are dependent upon each other's actions (Johnson & Johnson, 2002). The way interdependence around goals is structured influences expectations and interactions, which determines outcomes; competitive goals lead people towards opposing each other, but mutual success can be supported by relationships founded on cooperative goals (Johnson, 2003). Positive interdependence results in mutually beneficial outcomes, negative interdependence results in confrontational outcomes, and no interdependence results in no interaction. Positive interdependence is associated with cooperation, and negative interdependence with competition. Structuring positive interdependence into tasks is essential for establishing cooperative relationships among participants (Johnson & Johnson, 2003a).

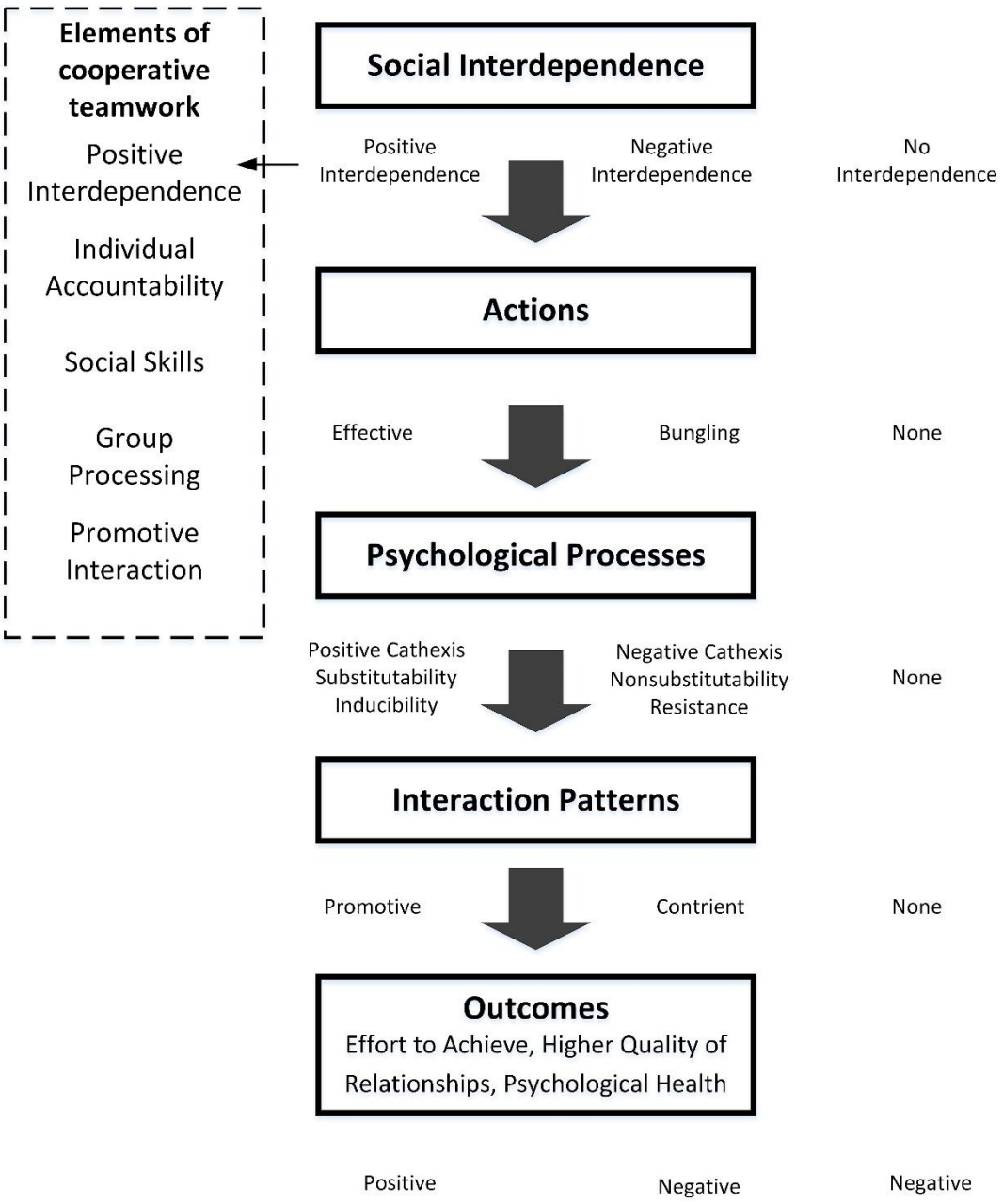
Elements of cooperative teamwork

To operationalise the theory for use in practice, Johnson and Johnson (2003b, 2009) undertook further research on the concepts of interdependence, interaction, and outcomes to empirically validate the elements of effective cooperative teamwork. The theory posits that to increase the likelihood of success, five elements must be purposefully structured. The five elements of cooperative teamwork include: positive interdependence, individual accountability, social skills, group processing, and promotive interaction (Johnson & Johnson, 2015). Structuring positive interdependence is essential for establishing cooperative relationships, and the other elements further contribute to team members successfully accomplishing their shared goals (Johnson & Johnson, 2003b). These elements provide useful information for how to successfully structure collective relationships and identify and cultivate the optimal conditions for the desired teamwork.

Figure 3 presents the theory in relation to the elements of effective teamwork, and a detailed description of each element follows the figure.

Figure 3

Social Interdependence and the Elements of Effective Cooperative Teamwork (Based on Johnson and Johnson, 2009, p. 367 and Rogers, Kelly, and McCoy, 2021).



The essential element, positive interdependence, is when everyone needs each other for success; co-workers are in a mutually interdependent relationship united to accomplish a common goal (Johnson & Johnson, 2003b). It pertains to establishing a mutual goal that connects individual actions to co-workers and means the individual's success is dependent upon the success of the other co-workers (Stevahn, 2013). It is based on the premise that an individual will increase their effort to achieve if they know that their performance affects the success of their co-workers (Johnson, 2003). Team members work together in a way that means they are mutually connected, and there is an understanding that effort, support, and trust will be reciprocated (Tjosvold et al., 2003).

Individual accountability is about doing one's fair share and making sure group members are held responsible for their contribution. The element occurs when all co-workers feel personally responsible to complete their allocation of the work, they help others to complete their work, they minimise barriers preventing others from doing their work, and they are held responsible for completing their work (Johnson & Johnson, 2002). Individual accountability involves two levels of assessment; individual performance and group performance are both compared against a standard, for the purpose of increasing the likelihood of everyone completing their share of the workload (Johnson & Johnson, 2003b).

The element of social skills is about communicating clearly and resolving conflicts effectively to accomplish tasks and maintain positive interpersonal interactions. The element involves elucidating a wide variety of communication skills, conflict resolution skills, and cultural competencies to get to know, trust, accept, and support co-workers, communicate unambiguously, resolve conflicts, and value and respect diversity (Stevahn, 2013). This not only includes verbal and non-verbal communication and managing differences of opinion, but also "valuing diversity, respecting difference, including all, [and] ongoing growth in knowing oneself and understanding others" (Stevahn, 2013, p. 34). Successful cooperation is dependent upon team members being motivated to acquire and use interpersonal skills for group work (Johnson, 2003).

Group processing is evident when the team pauses to reflect on the extent to which they are realising their ambitions and make assessments about the health of their working relationships (Johnson et al., 2011). This element is about team dynamics, reflecting on goal progression, and enacting improvements (Stevahn, 2013). Group processing is about reflecting on the degree to which the group is functioning well and determining what adjustments are needed (Johnson & Johnson, 2003b). Johnson and Johnson (2009) suggest the process is to "(a) reflect on which member actions were helpful and unhelpful and (b) make decisions about which actions to continue or change" (p. 369).

Promotive interaction is about providing encouragement, support, helpful behaviours, and facilitating the efforts of team members to complete the tasks required to achieve the mutual goals (Johnson & Johnson, 2003b). This element is about supporting and encouraging the success of all team members in ways that frequently involve face-to-face or close interpersonal encounters (Stevahn, 2013). So that all team members are encouraging each other, providing help, assistance, resources, or feedback may be required (Johnson & Johnson, 2003b).

When the elements of cooperative teamwork are incorporated into the design of teamwork with intent, and "followed rigorously," empirical evidence has demonstrated that increased productivity, psychological health, and quality relationships can result (Johnson & Johnson, 2002, p. 24). To support the outcome of increased productivity or effort to achieve, Johnson and Johnson (1999) stated, "Working together to achieve a common goal produces higher achievement and greater productivity than does working alone. This is so well confirmed by so much research that it stands as one of the strongest principles of social and organizational psychology" (p. 72). In contrast with being competitive, working cooperatively is highly correlated with many psychological indices, including evidence of increases in self-esteem, ego-strength, self-confidence, independence, and autonomy, as making a valuable contribution to teamwork enables individuals to see themselves as having value (Johnson & Johnson, 1999, 2003b).

Activities of champions in relation to the elements

This segment explicates how I aligned the elements of cooperative teamwork from the formal social psychological theory of social interdependence against the indicative activities drawn from the literature on champions. Chapter 6 discusses these alignments in more detail by drawing upon evidence from the findings of this research. Although the purpose of this segment is to outline why and how I aligned the elements against specific activities, I acknowledge from the outset that they are strongly interconnected and that these interconnections are important considerations when structuring teamwork. However, for the purposes of analysis, I make these delineations in the thesis.

The theory and method by which Stevahn (2013) applied the elements provided an appropriate way to investigate how evaluation champions enable cooperative interactions among peers (Johnson, 2003). Specifically, the process incorporated an interpretation of the elements of cooperative teamwork that Stevahn (2013) applied in a cooperative community-based research project. This practical application of the elements provided an example of the type of approach that an evaluator could undertake if they were applying the theory to work with a team of people on an evaluation task.

I found that Stevahn's (2013) practical examples and explanations were useful for assisting with matching the activities to an element of cooperative teamwork. In some cases, there was a close resemblance between Stevahn's (2013) explanation and the activity, so I gave them a primary label. Against other activities, there was only a minor association, so I gave them a secondary label. For example, positive interdependence was aligned with the activities requiring forward projection and the establishment of common goals. Promotive interaction linked with the activities related to working with team members to see the potential for evaluation, and social skills were connected to the activities supporting co-workers' involvement. Individual accountability and group processing were aligned in a secondary position to two of the activities where there was sufficient overlap to

assist with understanding what might be taking place. Table 4 illustrates the alignment of the indicative activities of evaluation champions drawn from the literature with an element of cooperative teamwork and a key quotation from Stevahn's (2013) research. The next section of the chapter combines the literature and theory into a conceptual framework to articulate the concepts that guided the research design.

Table 4

Indicative Activities in Relation to the Elements of Cooperative Teamwork

Activities	Stevahn, 2013, p. 34.
Advocacy for support and resources.	Positive interdependence = establishing a shared group goal that links individual outcomes to those of others in a way such that one's own success is facilitated (or inhibited) by the extent to which all other teammates are successful (or not).
Motivate others and provide energy, interest, and enthusiasm.	Promotive interaction = interacting in ways that support and encourage the success of all teammates, often requiring close proximity for meaningful interpersonal encounters that enable achievement of the shared group goal.
Provide or access tools, resources, networks, and expertise.	Social skills = enacting a host of interpersonal competencies broadly described as communication skills; conflict skills; and cultural competencies. Secondary: Individual accountability = following through, as when every team member provides needed contributions to accomplish the team goal and takes personal responsibility for the final completed team product by presenting, explaining, and defending all aspects of it.
Help others to apply evaluative thinking, use evaluation findings, and create opportunities for reflection.	Promotive interaction. Secondary: Group processing = evaluating and discussing the effectiveness of team dynamics, progress toward the final goal, and changes likely to enhance teamwork, thereby promoting team success.
Assist, train, mentor, support evaluation while considering different perspectives, and encouraging others to contribute.	Social skills.
Consider how evaluation can be strategically promoted and used for organisational change.	Positive interdependence.
Ask and encourage others to ask critical questions and initiate discussions and debates.	Social skills.
Develop engaging ways to explain details and develop common visions.	Positive interdependence.

Conceptual framework

Evaluation champions are an important factor for the success of an evaluation initiative and for supporting the uptake of evaluation within organisations. As the demand for evaluation in non-profit organisations increases, it is therefore worth questioning why and how these individuals work to promote evaluation. However, despite a significant literature base on champions in general, there is no overarching theory or model to explain the success of these individuals. The underlying assumption in this research was that to facilitate interactive evaluation practice among peers in an organisational workplace environment, these individuals would need to promote the cooperation and collaboration of their co-workers around evaluation.

Therefore, there are two layers to this conceptual framework: 1) The literature was used to extract what was known about the activities, strategies, motivations, and attributes of champions; 2) formal theory was used to understand what was happening on a social psychological level with the purpose of understanding the uptake of evaluation. The conceptual framework highlights the centrality of the theory of social interdependence; however, in line with an interpretivist epistemology, it also allows for theory generation in collaboration with participants.

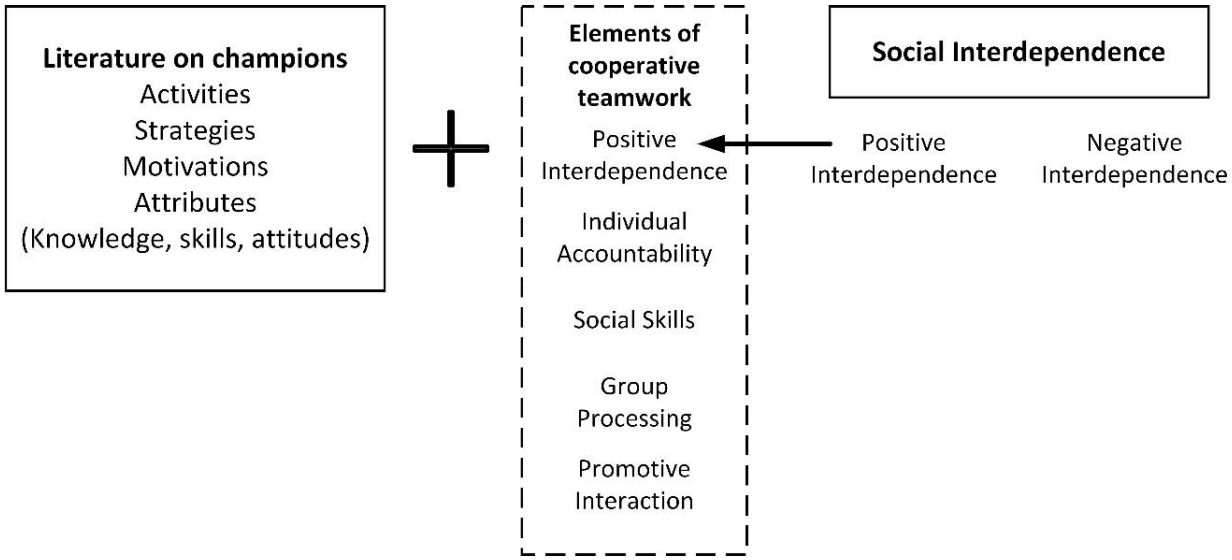
The main application of the formal theory to this research was in applying the elements of cooperative teamwork. The elements provided a useful frame for investigating the research questions because they assisted with eliciting how participants used interpersonal interactions to establish either competitive or cooperative goals. The intent was to unpack the assumption about the degree to which participants were effectively able to promote cooperative workplaces around evaluation.

Thereby, the findings were interpreted using the literature about the knowledge, skills, and attitudes about champions, in combination with the elements of cooperative teamwork, as these were the concepts that guided the data collection and analysis. The discussion in Chapter 6 focuses on the extent to which the findings align with the literature and the degree to which I found

evidence of the elements of cooperative teamwork in the everyday interactions among participants and their colleagues. Refer to Figure 4 for a diagrammatic representation of the conceptual framework. The next section of the chapter provides an overarching justification for the research and rearticulates the research questions.

Figure 4

Conceptual Framework: The Author's Own Synthesis of the Literature in Combination with a Representation of Social Interdependence Theory, Based on Johnson and Johnson (2009, p. 367)



Justification and research questions

Non-profit organisations are investing time and energy trying to solve social problems, and evaluation can help to understand if efforts are making a difference. Staff, decision makers, evaluators, board members, and executive leaders may need to engage with evaluation to a certain degree and increase the likelihood of evaluation being relevant, meaningful, and beneficial for achieving desired outcomes. Thereby, it is important to involve non-evaluators and understand more about their willingness and capacity to engage (Bryson & Patton, 2015; Clinton, 2014; Danseco,

2013). However, in non-profit organisations there are challenging circumstances and interpersonal dynamics that increase the resistance to and make communication about evaluation difficult. Hence, there is a need to find ways to reduce the barriers to evaluation and discover how to positively engage with non-evaluators to show them how evaluation can be of assistance.

The extant literature analysed in this chapter suggests that evaluation champions are non-evaluators with an intimate knowledge of the context; they have a positive attitude towards evaluation, can form collaborations, promote use, advocate, and encourage others to be involved, and have been identified as a factor to support the sustainability of evaluation initiatives (Chaudhary et al., 2020; King & Volkov, 2005; Labin, 2014; Preskill & Boyle, 2008a, 2008b; Taylor-Powell & Boyd, 2008; Wade & Kallemeyn, 2020). However, the field of evaluation knows only a little about their motivations, the way they promote evaluation to their co-workers, and how they embed evaluation in the organisational system (Silliman et al., 2016b, 2016a). Additionally, further explanation is required from the practitioners' perspective; the literature pays limited attention to the internal dynamics within organisations, specifically, how interactions occur around evaluation with co-workers over the long-term (Baron, 2011; Baughman et al., 2012; Boyce & Chouinard, 2017; Garcia-Iriarte et al., 2011; Herbert, 2015; Labin et al., 2012; Mayne, 2014; Preskill, 2014; Shaw & Faulkner, 2006; Whitehall et al., 2012).

Therefore, the instigation for this research was the lack of understanding about ways champions engage non-evaluators with evaluation and increase the uptake of evaluation in non-profit organisations. It responds to recent research calling for more details about how evaluation champions operate in practice. For example, while Wade and Kallemeyn's (2020) research demonstrated the importance of champions for sustainability, they recognised the need to understand more about how to cultivate champions. Silliman et al. (2016b) also called for further research:

> Going forward, more systematic and in-depth examination of champions' needs, contexts, and organizational dynamics from champions' own and others' perspectives (e.g., peers, clients, administrators, expert evaluators) is needed. Such research would enhance understanding of when, where, and how training, resources, and supports, formal and informal, might improve their effectiveness. Research within organizations or teams of all sizes and purposes would expand focus beyond larger Extension systems. (p. 37)

Hence, to understand how certain individuals engage with their peers to promote evaluation, to learn from them, and to support them, evaluators need to know more about their characteristics and professional experiences. This research used the proposed definition from Rogers and Gullickson (2018) to identify evaluation champions working in non-profit organisations and find answers to questions about their characteristics, motivations, and behaviours. The research questions were:

- What are the characteristics of evaluation champions working in non-profit organisations?
- What motivates champions to include evaluation in their everyday practice?
- In what ways, and with whom, do champions promote evaluation?
- In what ways, and to what extent, do champions support evaluation to be embedded within the organisational system?

The intention of this thesis was to investigate the characteristics of individuals working in organisations to examine why they engaged with evaluation and how they managed to promote evaluation to reluctant co-workers in the challenging non-profit context. Documenting participants' activities, strategies, motivations, and attributes would increase understanding of how to identify these individuals. It might also help to determine what they need in terms of professional development and organisational support and help to elucidate the way they work.

Summary

This chapter began by reviewing the literature on champions from other sectors with a focus on their knowledge, skills, and attitudes. Then after reviewing literature about other roles supporting the uptake of evaluation, the chapter developed a definition of what an evaluation champion may look like in practice. However, as the intent was to look at how these individuals were operating in organisations, the research also incorporated a theory that focused on team dynamics. The theory of social interdependence was useful for understanding how these individuals may be interacting with their peers. The overarching conceptual framework included both the literature on champions and the elements of cooperative teamwork in relation to establishing cooperative or competitive goals. The chapter concluded with a justification for the research, a re-articulation of the research questions, and a summary of the overarching intention of the thesis. The next chapter explains the methodology and details the methods used to answer the research questions.

CHAPTER 3 – METHODOLOGY AND METHODS

This chapter explains the process used to answer the research questions about the characteristics, motivations, and behaviours of evaluation champions. I begin by rearticulating the purpose of the research and the research questions before expanding upon the methodology that I initially introduced in Chapter 1. The chapter clarifies why qualitative methods were appropriate for emphasising the perspectives of participants and exploring their understanding of evaluation champions. It explains how the theoretical framework informed the research design. The chapter then details the research approach, including sampling, selection, and a description of how participants were engaged in a continuous process of data interpretation, reflection, and reality testing. It concludes by outlining ethical considerations and describing how this research aspires to be dependable and trustworthy.

Purpose and research questions

The ultimate purpose of this research was to identify and learn how to support evaluation champions. The extant literature acknowledges the importance of evaluation champions (King & Volkov, 2005; Preskill & Boyle, 2008a, 2008b), but recent publications identified the need to understand how they increase the uptake of evaluation (Silliman et al., 2016b, 2016a; Wade & Kallemeyn, 2020). Specifically, this research responds to the call to further explain and generate knowledge about the realities of practitioners working in organisations (Baron, 2011; Mayne, 2014; Preskill, 2014). To make this more tangible, understanding the phenomenon of an evaluation champion meant understanding more about their personal characteristics, activities, strategies, motivations, and attributes. Therefore, the research questions focused on the individual as the unit of analysis to build an understanding of their personal characteristics. The first research question examined the characteristics of evaluation champions, and the second question explored their motivations. The third and fourth questions related to their interactions with colleagues to examine how champions promoted and embedded evaluation in the system.

1. What are the characteristics of evaluation champions working in non-profit organisations?
2. What motivates champions to include evaluation in their everyday practice?
3. In what ways, and with whom, do champions promote evaluation?
4. In what ways, and to what extent, do champions support evaluation to be embedded within the organisational system?

Methodology

The ontological foundation upon which this research was based is that there is not one single truth when it comes to social circumstances and social interactions among humans. One person's reality may be different from another; multiple realities exist that are established from the perceptions and actions of individuals (Bryman, 2012; Schwandt, 2000). People have different ways of seeing the world, of interpreting the world, and of understanding how it works (Benner, 2008; Denzin, 2001). These multiple realities mean that no two humans in the same circumstances will see things in the same way. This research was not searching for one truth, but instead the intent was to explore commonalities and differences.

Taking an epistemological interpretivist perspective, humans are social beings that exist within a world of common meanings, habits, practices, and skills (Schwandt, 2000). Knowledge is created by testing, comparing, sharing, and co-creating. Knowledge is generated by jointly interpreting what is happening and then coming to consensus about something that has occurred (Bryman, 2012). This research intended to understand more about the social world and explore how other people make meaning and interpret their everyday activities (Denzin & Lincoln, 2005). The research allowed social practices and activities that happen in everyday life to become visible by accepting that one person's reality may be different from another and enabling the participants and myself to mutually influence each other (Schwandt, 1998, 2007).

Based on this ontological and epistemological position, qualitative methods provided a way of increasing understanding about a phenomenon by generating detailed and nuanced characteristics about evaluation champions as experienced by participants and their colleagues. It investigated interactions in a real-world setting. The intention was to emphasise and preserve the meanings and perspectives of participants and incorporate multiple constructed realities (Denzin & Lincoln, 2005). Nuances, feelings, underlying reactions, non-verbal responses, and verbal and written feedback were some of the types of data collected through the interviews. Capturing this depth of nuance and distinction is a particular strength of qualitative methods in contrast to using quantitative methods.

This research enacted this methodology. Participants in this research identified with the proposed definition of an evaluation champion. As the researcher, I collected their versions of reality, collated their interpretations, compared them to the literature, reflected upon them in relation to personal experiences, and then returned the new information to participants to see if it still aligned with their reality. Participants refined, expanded upon, and clarified interpretations. The aim was to understand and develop a reconstruction of an individual who champions evaluation based on a consensus developed between participants and myself. I recognised that I was developing my own story in collaboration with participants. I was facilitating the reconstruction of an evaluation champion by incorporating other people's voices in combination with my own (Guba & Lincoln, 1994).

Collaborating with participants working in the non-profit sector was also important on a personal level because, as an interpretive qualitative researcher, there was a valued opportunity to use these research skills to amplify the voices of those who were working to achieve their human and social service aims (Denzin, 2017). Consequently, the collaborative interpretive process and ongoing engagement provided valuable opportunities to access additional data that thereby strengthened the outcomes of this research. The next section of the chapter provides more details

about the design of the qualitative research and how I drew upon formal social psychological theory to assist with making sense of the interpersonal interactions.

Research design

To expand the understanding of an evaluation champion, this qualitative research had two parts undertaken concurrently. The individual was the unit of analysis in both parts. The first part captured the viewpoints of identified individuals through semi-structured interviews. The two purposes for the interviews were to (a) collect data with the individuals and (b) identify potential case study sites. Interviewing offered a way of elucidating another person's perspective and eliciting information that could not be ascertained by observation (Patton, 2002). In the second part, multiple case studies triangulated the initial findings by researching the experiences of selected individuals in real life situations (Eisenhardt & Graebner, 2007; Stake, 2006). The purpose of the case studies was to illustrate how these individuals operated in context, and interacted with their co-workers in a real-world setting. The purpose was also to produce findings that could be considered in relation to the theory of social interdependence to make a determination as to whether the findings were similar to occurrences in other social circumstances.

Interviews and multiple case studies were appropriate methods because the research involved understanding the challenging relationships between multiple systems (social, organisational, and inter-organisational). The interviews focused at the individual level, and the multiple case studies examined the characteristics and behaviours of individuals in relation to their interactions with colleagues in an organisational context. Case studies in multiple sites enabled a portrayal of an individual in a particular organisation and comparison of results through the identification and analysis of cross-case patterns, so the similarities and differences could increase the understanding of evaluation champions (Eisenhardt & Graebner, 2007). Refer to Figure 5 for an overview of the research design that will be explained in further detail below and Figure 6 for a diagrammatic representation of the connection between interviewees and case studies.

Figure 5

Overview of the Research Design Highlighting the Continuous Iterative Analysis

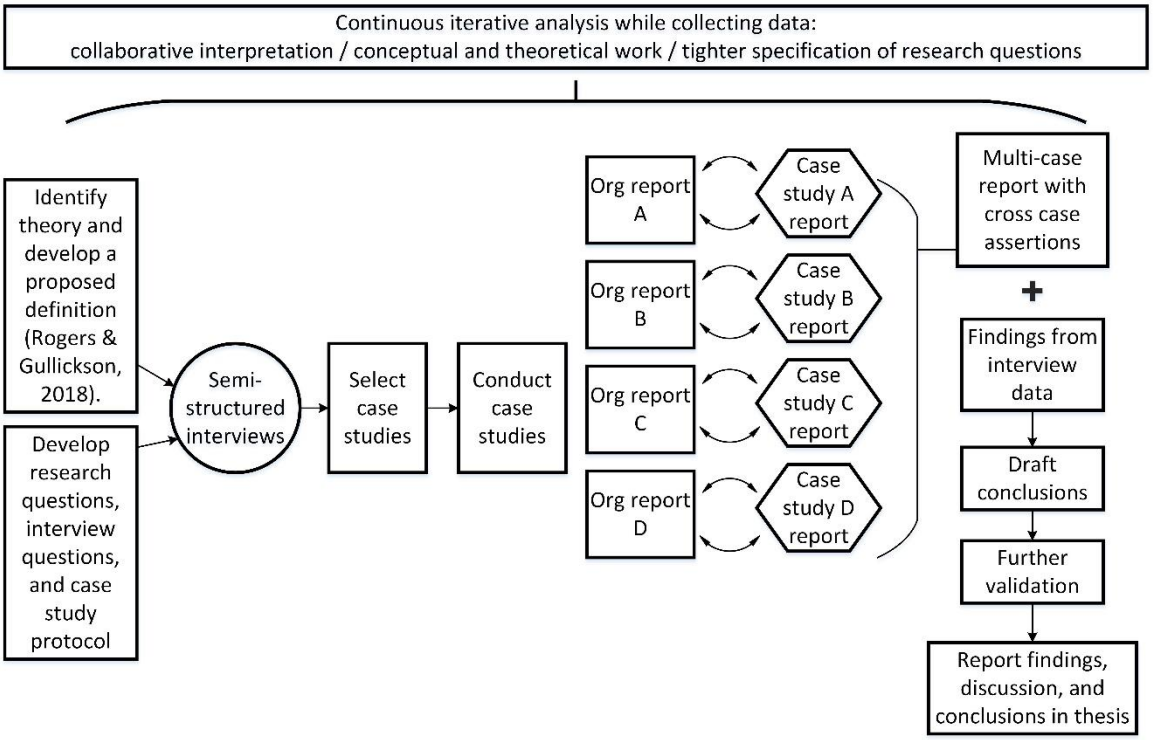
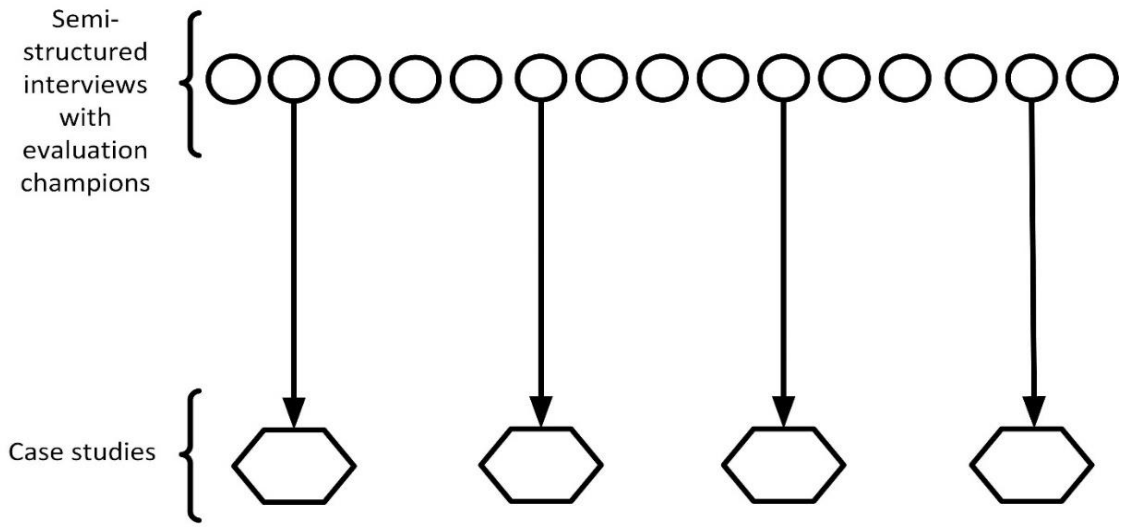


Figure 6

Relationship Between Interviewees and Case Studies



Application of the theoretical framework

Chapter 2 described the development of a proposed definition of an evaluation champion by combining the literature on champions with constructs from social interdependence theory. While case study research may contribute to theory, its primary purpose is not typically theory building (Stake, 2000a). Instead, Stake (1995) suggests applying a theoretical filter to provide a useful boundary for highlighting potential concepts without being too prescriptive. In this research the theoretical framework was used to frame the research questions and inform the design, method, and analysis. I applied the theory iteratively across the research to interpret the empirical findings and assist with the translation of research into practice, while also allowing for theory generation (Meyer & Ward, 2014; Timonen et al., 2018).

Applied to this research, this meant that while I paid consideration to the theoretical constructs throughout the research, I remained flexible and open to discovering new information beyond the formal theory (Meyer & Ward, 2014). The qualitative methods provided an opportunity to incorporate the formal social psychological theory, but I also used inductive reasoning and sought new information as the data were analysed rather than pre-determining the outcomes (Bryman, 2012). For example, during data analysis I used formal theory to sense check and make an assessment about the degree to which there was alignment with broader evidence; I coded against *a priori* themes derived from the elements of cooperative teamwork from social interdependence theory, but I also used an inductive approach to identify any emerging themes.

Semi-structured interviews

The approach to interviewing was responsive and the intent was to ensure that the interaction was like a conversation. According to Rubin and Rubin (2012), responsive interviewing occurs when "researchers respond to and then ask further questions about what they hear from the interviewees rather than rely exclusively on predetermined questions" (p. xv). The purpose was to hear the story from people's own perspectives, and semi-structured interviews offered the flexibility

to ask them about aspects in more depth. The intention was to create conditions that were conducive to exploring topics that might not be otherwise be elicited through a formal structured interview (Rubin & Rubin, 2012). This style of interviewing meant that new questions were incorporated during the interviews based on what the interviewee said, and participants were encouraged to share experiences in more detail if they were relevant to answering the research question (Patton, 2002; Rubin & Rubin, 2012).

Interviewees had the option of reading the open-ended questions in advance, and I encouraged all to be flexible in responding. The questions elicited information about self-described characteristics, motivations, and behaviours. Specifically, they were designed to seek more details from participants about cooperation and motivation in relation to the elements of the cooperative teamwork and in alignment with other relevant research (Johnson & Johnson, 2005; Preskill & Boyle, 2008b; Silliman et al., 2016a; Stevahn & King, 2005). I also included an additional question in relation to the non-profit context, specifically focused on the element of social skills, and another on the proposed definition because of the need to determine if these activities resonated with what participants were doing in practice. The process involved piloting the draft questions with an individual who was not eligible for inclusion in the research, but who was willing to contribute. The trial resulted in a reduction in the number of questions and an increase in the level of plain language.

Multiple case studies

The intention for the case studies was to illustrate how these individuals operated in context, interacting with their co-workers in a real-world setting. The purpose was to gain insight and understanding into a phenomenon, evaluation champions, and understand what was happening within a collection of individual cases. Stake's (2006) approach to undertaking case studies enabled an increased understanding of how this phenomenon operates in different situations. This approach to undertaking the case studies aligned with the epistemology; the role of the researcher was an interpreter or gatherer of interpretations from the multiple perspectives and views from within the

case (Yazan, 2015). This means that although the researcher is in the field to objectively record what is happening in relation to the literature and the data, the researcher is also required to examine their own experience simultaneously (Stake, 1995).

Stake (2005) believes case studies in qualitative research are suited to investigating the challenges and intricacies of a specific, unique, and bounded system and are suited to research that asks *how* and *why* questions. He defines a case as a "'bounded system'… An institution, a program, a responsibility, a collection or a population" (Stake, 2000b, p. 23). To understand the case, Stake (2006) suggests that the case needs to be experienced as it occurs in context. An instrumental case study provides understanding into a phenomenon, but when more than one case is examined, it is termed a collective or multiple case study (Stake, 2005).

As per Stake's (2006) multiple case method, each case was selected based on what it could explain about individuals and in relation to the other sites. Stake (1995) suggests that researchers ask the question: "Which cases are likely to lead us to understandings, to assertions, perhaps even to modifying of generalizations?" (p. 4). Thereby, the process involved selecting case study sites based on the interview results and then inviting the organisations to participate. It was useful to look at individuals working in organisational systems in several locations to discover meaning and understanding of experiences in context. The predominant focus in this research when considering recruitment, sampling, interview, and case study protocols was on the analysis at the multiple site level. The focus was on seeking out multiple perspectives, finding contradictions, and highlighting differences in values (Stake, 2006).

The semi-structured interviews provided the basis of the case studies. The interview data was triangulated with further evidence from the case studies to further investigate how these individuals promoted evaluation and to identify examples (Eisenhardt & Graebner, 2007). This research collected detailed data from a smaller number of cases, rather than standardised data from many cases (Miles, Huberman, & Saldaña, 2014). Variation among the types of non-profit

organisations, types of evaluation used, or sources of expertise were not limiting factors. Therefore, the locations of the case studies depended upon an assessment of the depth of data available at the site, the willingness of the participant, and the capacity of the organisation to take part in the research. The process also gave consideration to the potential for alignment with social interdependence theory and the elements of cooperative teamwork, in accordance with selecting sites based on there being an opportunity to learn (Stake, 2006).

For Stake (1995), interviews and observations are the preferred data collection methods with vignettes or small stories used to convey specific examples. He suggests that a conceptual framework may constrain the collection and analysis of data, however, he does suggest it may be useful to prepare a data gathering plan that includes "research questions, identification of helpers, data sources, allocation of time, expenses, intended reporting" (Stake, 1995, p. 51). Hence, the research involved developing a case study protocol to form the basis of the initial negotiations with representatives from the organisations who were willing to participate. The purpose of the protocol was to outline the standard research approach for the site and included the interview questions and a document list. The protocol also included an opportunity for the organisation to include specific requirements and expectations. The finalised protocol provided flexible guidance for interaction, but did not inhibit the potential for uncovering phenomena outside of this initial scope. Appendix C contains the interview guides and case study protocol.

Sampling, selection, and engagement

The research used purposive sampling, or purposefully engaged with individuals who matched specific criteria, because the research was deliberately seeking the perspectives of specific individuals in organisations (Bryman, 2012; Punch, 2014). The key criterion was that an evaluator or colleague nominated potential participants because they considered them champions of evaluation. This meant that the evaluators considered the potential participant to be an advocate for evaluation, a promoter of evaluative thinking and methods, someone who cares about the findings and

encourages use, promotes the benefits, and generates support among their peers (King, 2007; Patton, 2008; Rogers & Gullickson, 2018; Stockdill et al., 2002).

I did not restrict the sample based on whether participants were working in any specific type of human social service non-profit organisation, their gender, whether they identified as members of a culturally or linguistically diverse culture, their level in the organisation, their years of experience, or their degree of interaction with evaluation expertise. The following criteria determined the selected participants, that they:

- were nominated by an evaluator or colleague as an evaluation champion
- were employed in a non-profit organisation
- did not have any reference to evaluation in their job title
- displayed characteristics or undertook strategies and activities that were indicative of an evaluation champion. As such, they might:
    - Advocate for support and resources
    - Motivate others and provide energy, interest, and enthusiasm
    - Provide or access tools, resources, networks, and expertise
    - Help others to apply evaluative thinking, use evaluation findings, and create opportunities for reflection
    - Assist, train, mentor, support evaluation while considering different perspectives, and encouraging others to contribute
    - Consider how evaluation can be strategically promoted and used for organisational change
    - Ask and encourage others to ask critical questions by initiating discussions and debates
    - Develop engaging ways to explain details and develop common visions (Rogers & Gullickson, 2018, p. 55)

Professional networks were the primary source of participants due to convener roles I held at the time of the research with the Australian Evaluation Society and Australian Council for International Development. The process involved emailing a plain language statement to evaluators in the networks inviting them to send the email to potential participants or provide contact details in an introductory email. Appendix D contains the recruitment emails, recruitment flyer, plain language statements, and consent forms.

Evaluators used the proposed definition and list of indicative activities to identify potential participants and then contacted them via email to provide details about the research. When the potential participants contacted me directly or indicated their willingness to the evaluators, I checked that they met the eligibility criteria and formally invited them to participate in a semi-structured interview. The process observed all local organisational protocols. Participants signed a consent form prior to the interview. At all stages of the research there was ongoing consultation and negotiation between myself and participants to ensure willing and informed consent.

Engagement with participants

As described earlier, in alignment with the interpretivist methodology, the research was collaborative. Participants were engaged at several points to sense check the findings and enable a high level of co-creation. As the researcher, I was not a detached observer, but instead embraced the opportunity to generate data in collaboration with participants. As well as working in a non-profit organisation in an internal evaluation position, I had also developed extensive networks over many years through multiple extra-curricular professional avenues. I spent years prior to the research building rapport, developing trust, and establishing mutually beneficial interactions with evaluators and people working in non-profit organisations. These cooperative arrangements were the basis upon which representatives from the organisations could consider myself as a researcher worthy of sharing their valuable time.

Therefore, my role and position in relation to participants, as someone who had worked in the context for many years and who had developed trust that enabled access, strengthened the process of knowledge construction. The research was intended to "construct an *interpretive rendering* of the world we study rather than an external reporting of events and statements" (Charmaz, 2014, p. 339, emphasis in original). This was also part of my obligation to distributive justice, meaning the research was of benefit to participants and that I fairly distributed the research outcomes (Morris, 2008).

The research involved a continuous process of interpretation of data, reflection, and reality testing with participants. In summary, all participants had a minimum of three opportunities to contribute to the development of the findings and provide feedback. I received feedback from 14 of the 17 participants at least once. The points of engagement included:

- Seeking feedback from peers on a conference poster on evaluation champions that generated interest among potential participants and evaluators who could nominate participants
- Emailing a transcript of their interview to participants and giving an opportunity for all to choose their own pseudonym
- Emailing the published literature review journal article to all to share the findings as they were being generated
- Emailing the participants stories and key quotations that enabled thirteen participants to contribute to developing their story into a vignette and refine the quotations
- Emailing a transcript of the interview to all case study participants, colleagues, and evaluators
- Producing a summary report for each case study organisation related to the research questions with results of the document analysis in combination with the analysis of the interviews

- Developing a report for each organisation that answered a question nominated by the organisation so it was useful, meaningful, and contributed to the organisation's overarching goals; I gave an oral presentation to one organisation
- Sharing a preliminary version of the overall findings with all participants and seeking their input
- Emailing another presentation to all participants and giving them an opportunity to provide feedback prior to presenting the findings at an evaluation conference

This level of interaction was a likely factor in procuring an adequate level of quality and quantity of data. As the data collection section will describe in detail below, the engagement process with the case studies facilitated access to additional documentation and additional colleagues for interviewing. Collaboratively developing the vignettes, clarifying quotations, and sharing the preliminary findings made participants aware of how I was using their research contribution and increased my confidence in reporting the findings.

Data collection

Participants

The research involved interviewing 17 participants, all of whom were experienced practitioners. The ten women and seven men had been employed in their organisations for more than five years and had been working in the non-profit sector for at least ten years. Most participants did not have any direct reports. Participants were either of the cultural and linguistic group that was the focus of the organisation or had worked with the target audience for more than five years. In total, six participants self-identified as having a culturally and linguistically diverse background; four participants identified as being Aboriginal and/or Torres Strait Islander Peoples, and two stated they grew up outside of Australia, one in the United Kingdom, and one in a western African nation. Table 5 displays details about participants with pseudonyms and selected demographics.

Table 5

Participant Details

Pseudonym	Gender	Level of position	Purpose of organisation	Size of organisation
Fred	Male	Senior	Community development	Small - fewer than 50 employees
Mary	Female	Project	Community development	Small
Sally	Female	Middle	Family support	Large – national
Wendy	Female	Middle	Health	Small
Jenny	Female	Middle	Community development	Large – national
Serena	Female	Project	Health	Small
Duncan	Male	Project	Health	Small
Allan	Male	Project	Community development	Small
Charles	Male	Senior	Family support	Large – national
Karen	Female	Project	Health	Small
Michael	Male	Senior	Family support	Small
Judy	Female	Senior	Youth development	Small
Kelvin	Male	Senior	Family support	Small
Alice	Female	Project	Family support	Small
Sophia	Female	Middle	Family support	Small
Jack	Male	Middle	Legal support	Small
Tahlia	Female	Project	Health	Small

Interviews

Participants received a high-level overview of the questions during the initial interaction with myself and were offered an interview guide prior to the interview to allow time for contemplation and assist with recall (Schwarz & Oyserman, 2001). The order and phrasing of the questions varied depending on the interview, and further questions were added in response to significant replies (Bryman, 2012). Interviews were conducted with 17 participants over an 18-month period 2017 to 2018, pre-COVID-19. Participants chose the location of the interview; seven interviews occurred over the telephone, and ten were face-to-face in a private area at the participant's workplace. They lasted an average of 70 minutes, but ranged from 30 to 99 minutes. I took notes during the interview of key points that required further questioning, and immediately following the interviews I wrote my impressions in a reflective diary. I digitally recorded and transcribed all interviews and sent a verbatim transcript to each participant within four weeks of the

interview. Two participants returned the transcripts with minor amendments; the remaining 15 did not. I offered all participants an opportunity to change their pseudonym, but none did.

Overall, responses to the interview questions were consistent across the sample. There were minimal differences among participants at different levels of the organisational hierarchy, among different genders, or among different culturally and linguistically diverse groups. Distinct patterns emerged where participants responded negatively to a few of the questions and then, in contrast, provided consistently positive responses to several of the other questions. My interpretation of these patterns was that participants were answering the questions with a high degree of honesty and openness. They felt comfortable to challenge the underlying intent of the question when required and provide their own insights. Participants were willing to talk about their strengths and what they believed they brought to the organisation. They were also articulate in sharing when they needed to source support, guidance, and expertise from others to address their skill gaps.

Case studies

I conducted two rounds of recruitment for case study participants. From the sample of 17, I asked three participants if they would be willing to be the subject of a case study with their organisation because their interviews were of high quality with the potential to access to a substantial quantity of documentary data. One said yes; the two who declined expressed willingness to participate, but could not, due to lack of time and organisational support from their managers. Two participants volunteered their organisations to be case studies, but I respectfully declined due to lack of available documentary data. I then extended the invitation to another seven participants, and three accepted. Chapter 5 presents detailed information about the final sample of case study participants, three of whom were at senior levels and one at the project level of their organisation.

Consistent with the qualitative research strategy, data collection involved semi-structured interviews with evaluators and colleagues working with the participant, a document analysis, and a site visit. Data collection occurred prior to the pandemic over the two-year period 2017 to 2018.

Several sources of data enhanced the opportunity for me to find evidence in support of what participants had said or critically review materials with information to the contrary (Stake, 2006). Documents included evaluation reports, minutes from meetings, organisational charts, annual budgets, communication logs, work plans, internal reviews, and reports from public and private sources. A site visit occurred at all four of the organisations with the primary purpose of conducting the interviews required. I wrote a site visit report immediately following the visit that included observations about the work environment. Interviews that were not able to be undertaken during the site visit were completed via telephone. I deliberately chose these data sources because of the time constraints evident for non-profit organisations and to ensure as minimal disruption to normal work routines as possible. Therefore, the instruments required for data collection were interview protocols and case study protocols.

Prior to commencing the case study, I discussed the potential benefits of the research with participants and representatives from the organisation, who described their internal requirements for a report. I negotiated to undertake a piece of work that would be useful for the organisation. In addition to producing a summary report with the research results, I developed a report specifically for the organisation answering a question separate from the research so it was useful, meaningful, and contributed to the organisation's overarching goals. In three of the cases, undertaking this reciprocal arrangement of developing a report with the organisation resulted in the organisational representatives sourcing additional documents, identifying key co-workers who could provide further insight, and facilitating site visits.

I returned the written report to each organisation and gave an oral presentation to one organisation. Representatives from each organisation reported that the process was useful for reflecting on their own practice and communicating their experience. Since they had limited time and resources, the organisations commented that they valued the additional resource that a researcher could bring to their organisational development.

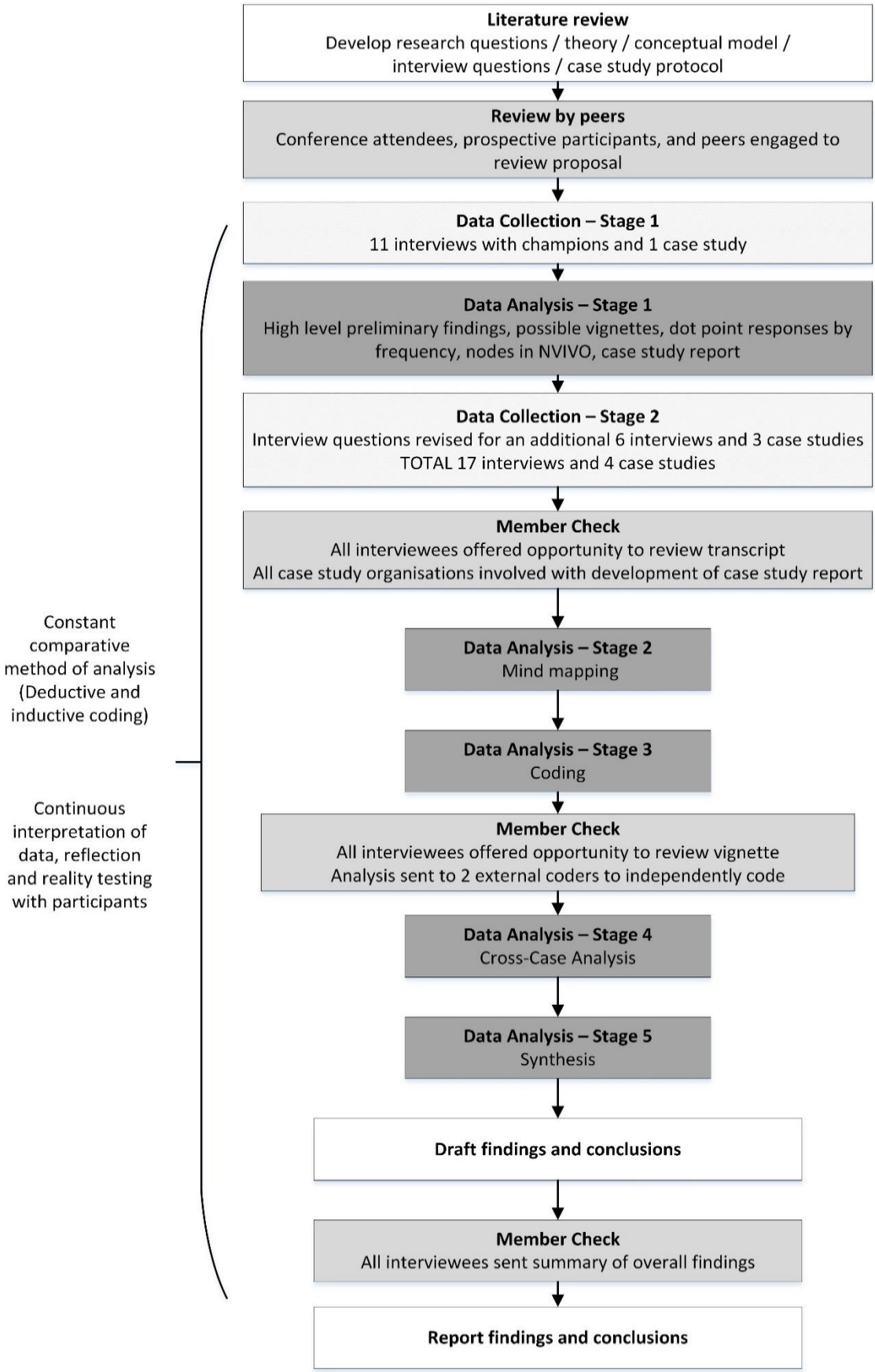
Data analysis

Constant comparative method

This research used Stake's (1995) suggested approach of collecting and analysing data simultaneously and followed his recommendation to aggregate categories and directly interpret the data. Specific techniques were presented by Stake (2006) to find patterns in the data, but he also recognised that the researcher needs to find their own appropriate approach. The process was guided by the constant comparative method where nuances and patterns were coded under categories as the data were collected and analysed through an iterative process (Strauss & Corbin, 1990 cited in Bryman, 2012). Refer to Figure 7 for an overview of the intersection between data collection, analysis, and member checking through engagement with participants. Appendix E contains a more detailed overview of the iterative data collection and analysis process.

Figure 7

Overview of the Iterative Data Collection and Analysis Process



Stage 1

To commence answering the research questions, I undertook the preliminary data analysis by taking detailed notes from all the transcripts and catalogued them against the interview questions that linked to the research questions. The de-identified transcripts, with participants' designated demographics, were uploaded to NVivo (NVivo, 2012). Initial coding to nodes in NVivo of the first 11 interviews and one case study followed the topics from the interview protocol and theoretical framework; codes were identified prior to the analysis (*a priori)* based on the interview questions and elements of cooperative teamwork (Miles & Huberman, 1994). Then I coded each transcript to the additional five codes that emerged inductively from the data to capture the unanticipated concepts, insights, and emergent findings (Miles & Huberman, 1994).

Stage 2

At the commencement of stage 2, over 18 months had lapsed since the first interview. To refamiliarise myself with the data, I listened to each of the recordings again while reading the transcripts. I rectified errors in the transcripts and noted interesting findings, possible themes, and important quotations. The process began with participants who were involved with the case studies, and, after listening to their recordings, I plotted the key themes and high-level findings onto a spider diagram that correlated with the research questions. After four diagrams were produced, the information was consolidated onto one mind map. After I reviewed each of the remaining 13 interviews, I added any new findings to the master mind map.

Stage 3

The preliminary stage 1 findings and the stage 2 master mind map were both reviewed to develop the code book, which was used to code 17 interviews to nodes in NVivo and document any interesting potential stories into a spreadsheet (NVivo, 2012). A selection of coded de-identified interview data was sent to two independent coders. The assessment showed 70% of codes were covered with a reasonable level of consistency, which indicated that the coding approach was able

to be interpreted by an external audience. Initial impressions and critical reflections were recorded in a reflective diary. The key quotations and potential stories that could be developed into a vignette were emailed to each participant to give them the opportunity to review their own analysed material.

Stage 3 involved re-reading the contents of each node individually and reducing any irrelevant material. The matrix of participant characteristics was defined, and I began to consider how to delineate the responses from participants. This reflection time involved developing an initial implications and contributions table that was further refined over the course of the research. Refer to Table 6 for the final code book.

Table 6

Code Book

Main code	Secondary code	Tertiary code	Description
General	Champion	Positive; negative.	Any response to the label.
	Change	-	Change processes; change management; advocating for change.
Characteristics	Attitudes	-	Personal traits.
	Behaviours	-	Any actions, strategies, activities.
	Skills	Positive; negative.	Evaluation skills – any response.
	Values	-	Any personal or organisational level.
	Cognition	-	Thought processes.
	Knowledge	Knowledge translation; knowledge management; evidence-based; sources.	Bridging communication; knowledge gap; broker role; sources of knowledge; expertise.
	Inclusion	Communication skills.	Inclusive behaviours; thoughts about being inclusive.
	External context	Non-profit context; relationship with academics, evaluators, or funders.	Evidence of systems thinking or working strategically in consideration of context external to the organisation. Any reactions or challenges in relation to working with academics, evaluators, or funders.
	Leadership	Type; positive; negative.	Evidence of top down, bottom up, horizontal. Support or lack thereof from leaders.

Main code	Secondary code	Tertiary code	Description
Motivation	Accountability	-	Evaluation as an external requirement.
	Capacity building	-	Learning that comes from the evaluation.
	Effectiveness	-	Assessing or demonstrating effectiveness.
	Improvement	-	Desire to see organisation develop.
Promotion	Positive interdependence	-	Evidence of finding shared value or developing a group goal that links all individuals.
	Individual accountability	-	Evidence of making sure every team member contributes to the evaluation.
	Social skills	-	Evidence of communication skills, conflict management, or being inclusive.
	Group processing	-	Evidence of reflecting on effectiveness of the team or progress towards goal.
	Promotive interaction	-	Evidence of providing encouragement.
Sustainability	Not sustainable	-	Evidence of unsustainability.
	Emotion	-	Uses emotional strategies.
	System	-	Examples of building systems, processes, or policies.
	Evaluation culture	-	Examples beyond systems, processes, or policies.

Stage 4

A cross-case analysis was the analytical approach used to highlight differences and similarities between cases about the phenomenon of evaluation champions (Stake, 2006). The case studies were conducted in a series. The primary sources of data included: audio recordings of semi-structured interviews, verbatim transcripts of interviews, reviewed transcripts, and organisational documents related to evaluation. To facilitate data analysis and aid in retrieval, all materials were systematically organised, catalogued, and stored electronically. In addition to the four reports written to answer the question nominated by the organisations, I also produced a brief research case study report for each case. The purpose was to provide background specifically to assist with answering the research questions: history, context, issues, and data collection details.

All transcripts and documents were uploaded to NVIVO (five to seven interviews, two reports, observational data, and documents for each case) and were coded against the codes in stage 2, then analysed and synthesised to examine emerging issues and themes (NVivo, 2012). I then

generated a multi-case study report that contained a brief synopsis, description, constraints, overview, vignettes, a rating of prominence of themes, a rating of usefulness of the case for developing the themes, an assessment of uniqueness among other cases, findings, and general commentary (Rogers, 2019). The final stages of the cross-case analysis involved rating each finding from each case study as to its importance in relation to the themes, and then generating a final set of assertions by taking the prominent themes and the findings that rated highly and combining them with the unique findings from the individual cases. Within the case analysis, the findings in context of that particular organisation were examined, while cross-case analysis explored findings that might appear in some situations, but not others. The findings from the case studies supplemented the results from the interviews, and this iterative process enabled the construction of characteristics of participants in different settings. Chapter 5 provides additional detail about Stage 4.

Stage 5

The final stage was focused on synthesis. The process compared the findings from the interviews with the assertions from the multiple case study cross-case analysis, implications, contributions tables, and the literature. To consolidate the research, using an iterative process, I generated a table of key discussion points that answered the research questions.

Ethical considerations

As none of the interview questions required discussion of sensitive or distressing topics, there was minimal risk of harm or discomfort to participants associated with this research. The questions focused on asking about experiences of evaluation in the workplace, and there were no questions related to specific organisational content. There was a risk of confidentiality being breached due to the small size of the organisations. Every attempt was made to avoid this from occurring by de-identifying participants and using only aggregated results. The confidentiality and anonymity of responses were upheld through the use of pseudonyms, coding, and changes to other identifying information that was applied to the transcripts before analysis.

Participants already held demanding roles, so there was a risk of inconvenience, or opportunity cost, to participate in the research. However, the inconvenience of the time imposed was kept to the minimum possible. The methods were appropriate to answer the research questions and placed minimal burden on participants. Participation in the project was undertaken at convenient times and locations for participants to reduce disruption to their work responsibilities.

Ethics approval was sought and approved from University of Melbourne Human Research Ethics Committee (HREC: 1647875), and a letter of endorsement was received from the organisations involved in the case studies. All local organisational requirements for obtaining consent were followed with written consent being obtained from the appropriate organisational representative. Plain language statements, consent forms, interview questions, and case study protocols were developed and provided to support the ethics application. Informed consent processes were applied as required for ethical research. Participants were free to withdraw from the project at any time, but no participants withdrew.

Some participants were from culturally and linguistically diverse backgrounds, including Aboriginal and Torres Strait Islander Peoples. The questions were focused on asking about experiences of evaluation in the workplace, and there were no questions related to specific Aboriginal and Torres Strait Islander knowledge. Relevant national statements on other ethical issues that related to this project were considered for guidance. Appendix F summarises how I addressed the potential issues when researching with Aboriginal and Torres Strait Islander Peoples. Statements are in relation to the Guidelines for Ethical Research in Australian Indigenous Studies (AIATSIS, 2012).

Dependability and trustworthiness

Reliability and validity were important considerations throughout the design and analysis stages of this research to ensure the results were found worthy of consideration (Lincoln & Guba, 1985; Patton, 2002). Golafshani (2003) stated, “Reliability and validity are conceptualized as trustworthiness, rigor and quality in qualitative paradigm” (p. 604). In this qualitative research, the

notion of *reliability* is interpreted to mean dependability or consistency as suggested by Lincoln and Guba (1985). This means the research can be judged or verified as being dependable after examination of the raw data, products, and processes undertaken (Golafshani, 2003). To ensure transparency and to enable other researchers to consider how the findings and conclusions were reached, the procedures were made explicit in the following ways:

- A detailed audit trail documented the steps, methods, analysis, and all decisions taken throughout the research
- A case study protocol, and process notes, raw, and analysed data were collated and made available for verification

This was in response to Stake's (1995) call to "go beyond simple repetition of data gathering to deliberative effort to find the validity of data observed" (p. 109)

This research strived for a level of dependability that could mean the findings are potentially transferable or generalizable to others in different settings. Lincoln and Guba (1985) stated, "At best the investigator can supply only that information about the studied site that may make a possible judgement of transferability to some other site" (p. 217). To produce meaningful data that have the best chance of being applicable for others in different settings, this research included:

- Detailed descriptions of the case study sites
- Appraisals of the degree to which the findings resonate with the literature from other settings and sectors

Lincoln and Guba (1985) also replace *validity* with trustworthiness, and this research aimed to produce defensible results that instill confidence. The data were triangulated to enhance trustworthiness (Patton, 2002). Stake (1995) offers four strategies for triangulating data: data source, investigator, theoretical, and methodological triangulation. To demonstrate that data were accurate and appropriate in this research:

- Feedback was sought from participants to verify the accuracy of information and interpretation, and they had an opportunity to discuss the findings as a method to ensure trustworthiness. Stake (1995) suggested that member checking is intended to "gain the needed confirmation, to increase credence in the interpretation, to demonstrate commonality of an assertion" (p. 112). I documented any feedback or differences discussed that resulted from member checking and considered during analysis.
- Case studies were used in combination with theory to build conclusions; indicators representing the elements of cooperative teamwork from social interdependence theory were identified and considered from the outset (George & Bennett, 2004).
- Multiple methods of data collection were undertaken and analysed against contrasting data sources (document analysis, interview transcripts) within the case studies to cross-check the information, strengthen the evidence, and increase the confidence in the findings (Stake, 1995).
- In the case study specifically, I developed a chain of evidence in a database for the purposes of pattern matching and explanation building. The draft case study report was also provided to the case study participants for review and member checking (Stake, 1995).

Stake (1995) encourages researchers to ask themselves: "'Do we have it right?' Not only 'Are we generating a comprehensive and accurate description of [the case]?', but 'Are we developing the interpretations we want?'" (p. 107). This research acknowledged the importance of my involvement and adopted Patton's (2002) statement that: "The researcher is the instrument" (p. 14). I acknowledged that I was an integral part of this research. Knowledge was co-created among myself and participants, as is appropriate given my professional background and personal experience. However, I endeavoured to keep an open mind and was willing to consider a wide range of possibilities to find alternative explanations of the data. This suggestion from Stake (1995) resonated

strongly: "Again and again, reflecting, triangulating, being skeptical about first impressions and simple meanings" (p. 78). The implications of this approach involved:

- Including biographical details about myself as a researcher in the analysis
- Searching the data and literature for evidence that went against the findings and purposefully seeking out data that did not fit the analysis; I explored possible alternatives and rival explanations
- Scheduling debriefing opportunities with peers and supervisors; I engaged with critical friends to elicit contradictions in my approach or patterns of behaviour that I was not consciously aware of
- Documenting how I believed my personal identity to have impacted upon participants
- Maintaining a diary to foster reflexivity and reflection, which I used to consider the extent to which I approached the research with an open mind; prior to data collection, I also documented prior knowledge, preconceptions, values, and expectations

Summary

This chapter explained the process used to answer the research questions about the characteristics, motivations, and behaviours of evaluation champions. This research used semi-structured interviews to ask participants to explain their own understanding of their experience of engaging with their co-workers to support evaluation in non-profit organisations. To gain an understanding not only of the individual experience, but also to make sense of what was happening in non-profit organisations that serve a community service role, I used a multiple case study approach. This research generated qualitative data from documents and interviews with individuals and their colleagues. Using multiple sources of data from the case studies to add depth to the interview data contributed to the trustworthiness of the findings, as did undertaking member checking with participants. The next chapter examines the findings from the interviews with participants.

CHAPTER 4 – FINDINGS FROM INTERVIEWS

The purpose of this chapter is to collate the findings from the interviews with the 17 participants by presenting the data in the form of examples, illustrative quotations, and vignettes that were co-constructed in collaboration with participants. This chapter has four sections. It begins by detailing how the use of the proposed definition helped to find participants, presents findings focused on their activities in practice, and describes the extent to which this representation resonated with participants. The second section examines in greater depth how participants worked with their co-workers by documenting their strategies for promoting evaluating and articulates the issues participants had in supporting their initiatives to be embedded within the organisational system. The third section relates to the research question, 'What motivates champions to include evaluation in their everyday practice?' and the final section presents the self-reported attributes derived from the interviews to help understand the inherent features that enabled participants to effectively work with their colleagues around evaluation.

As detailed in Chapter 3, analysis incorporated formal theory to check and assess whether there was alignment with broader evidence. *A priori* themes derived from the elements of cooperative teamwork from social interdependence theory guided the analysis. In combination, an inductive approach was incorporated to identify any emerging themes arising from the participants' interviews. This chapter briefly notes where there was or was not alignment with the theory's elements of cooperative teamwork with Chapter 6 providing a more in-depth discussion of the relationship between the findings and the theory.

Activities: What participants did in practice

Response to the proposed definition

As detailed in Chapter 3, the proposed definition and list of indicative activities of evaluation champions were key tools in the recruitment of participants. Evaluators gave positive feedback

when they viewed the definition and used it to identify potential participants. A few also remarked that the list was useful for helping them articulate in detail why it was so important to have people undertaking those activities on their evaluation team.

Participants also provided positive feedback in relation to the definition and listed activities. They recognised a connection between themselves and the definition, and nearly all participants responded with strong affirmation when asked which of the activities resonated with their practice. This response from Kelvin was the most definite: "Sure. Yep. Yep. Yep. Yep. Yep. Yep. A hundred per cent. My God! Yeah. Yeah. Absolutely – every one of those things and that's been the whole journey - I'm seeing me there. That's fantastic!" Table 7 summarises project-level and senior-level participants' reported engagement with activities from the definition, in order from most frequent to least.

Table 7

An Indication of Participants Undertaking the Activities in Practice

Activities from the proposed definition (Rogers & Gullickson, 2018, p. 55)	Total number of positive indications out of a possible 17 participants
Motivate others and provide energy, interest, and enthusiasm	15
Advocate for support and resources	14
Assist, train, mentor, support evaluation while considering different perspectives, and encouraging others to contribute	14
Consider how evaluation can be strategically promoted and used for organisational change	14
Ask and encourage others to ask critical questions and initiate discussions and debates	13
Develop engaging ways to explain details and develop common visions	13
Help others to apply evaluative thinking, use evaluation findings, and create opportunities for reflection	12
Provide or access tools, resources, networks, and expertise	12

While not all participants thought that they undertook all the activities all the time and in equal measure, there was unanimous agreement that overall, the list was indicative of the types of activities they undertook. Responses included, “I’m certainly in that space. Yep. I think I do that. Um – yep. Yes, definitely” (Judy); “Yeah, quite a lot of them” (Karen); “They all do” (Serena); “When I read it, I kind of thought, yeah I’m doing all that [laugh] sort of” (Wendy); “Yeah, definitely, all of those… but not from a technical standpoint” (Charles); “They all gel. They are all pretty spot on” (Fred); “I think I do all of those, and I think the difference is that there are higher percentages of effort, and lower percentages at a particular time” (Jenny).

Some participants also indicated that the list of activities itself was a useful tool that had an immediate applicability for use in their current roles. An example came from Jack who ended the interview with,

> So, I think all of those things are things that I’ve done. I haven’t necessarily done them consciously thinking, “I am now championing evaluation,” but I’m championing the things that I want to champion anyway… I was going to ask you if I can use this [list], and share it with other people to talk about evaluation?

Participants agreed that thinking critically, practising reflection, and promoting evaluation among colleagues, the three key elements of the definition, were indicative of what they did in practice. Participants particularly emphasised that they highly valued taking time to stop and reflect on their work, including self-reflection in regards to how they were working with others, as illustrated in this quotation from Karen:

> I often reflect on it myself… if I’m getting more enthusiastic than other people, if I’m getting more pushy, if I prioritise something that other people haven’t prioritised, you’ve got to be always aware of that. So always assessing the environment where people are at.

Hence, there was evidence that supported the list of activities and proposed definition: “an employee who practises reflection and critical thinking, and promotes evaluation among colleagues” (Rogers & Gullickson, 2018, p. 55).

No ‘I’ in teamwork, nor any champions

Although participants unanimously accepted the wording in the definition and list of activities, there was strong resistance to the *champion* label. Initially, some participants reacted positively to the fact that an evaluator or colleague had nominated them as an evaluation champion. They took pride in the notion that they were promoting evaluation as affirmed by Sally, “Yeah. I suppose I would. I do definitely see the value in evaluation and the outcomes that it can achieve if you do evaluation.” Some reluctantly accepted the champion label: Wendy said, “I want to be one. I don’t know. A mini-one?” and Sophie hesitantly said, “I suppose I do – yes.” However, only a small number of participants uttered these hesitant indicators of agreement. The majority gave at least one reason, if not several reasons over the course of the interview, as to why they disliked the label.

One reason participants did not want to be called a champion was because of the connotations with technical expertise. Participants considered champions to be *experts*, the *go to* person for assistance or the person who is responsible for doing evaluation. Jack said,

> I think the obvious risk is the idea that everyone gets which is, “Oh, yeah. He’ll do the evaluation, so I won’t have to do anything.” You know, then that misinterpretation of the word, champion, rather than championing as a verb – but champion as in the expert in doing it – “Great, we’ll just leave it all there [with the champion]!”

Some of participants said that to be worthy of this title, they would have to increase their specific evaluation skills, undertake formal training, or obtain qualifications. Judy said,

> The risk is not feeling like you're stepping up to that point. But I think what it might do is to provide impetus to make sure you have it up front and dedicate more time to it, or whatever is required to make you feel like you're worthy of such a title.

Tahlia similarly reiterated this sentiment: "'cause they're going to think I'm really smart, and they think I'm going to know everything. What if I don't? I don't want to disappoint people, especially myself. Anyway, it's like I know what I know. So, it's a very humble thing."

However, another reason given for why the term was inappropriate was because it was not conducive to facilitating teamwork. Participants considered such a label to be culturally inappropriate, to not align with the concept of humility, and to have negative connotations associated with winning and losing. Alice said, "Everyone is part of the success. It's never a one-off, and to isolate a person, or even a group, and say, 'Oh, you're the achievers. You're the champions.' It's not really helpful." In relation to group dynamics among co-workers, Jack said using a term like *champion* could be detrimental:

> Any kind of elitism or power imbalance is a risk and sucks away space from other people to potentially take it on… We know that if you appreciate people, then they grow in their confidence and competence to do things. But you don't want to overdo that and also exclude others… If you think about all that work in Aboriginal communities, and you think about anyone being spotlighted, or highlighted, or drawn out from the crowd [is inappropriate], and so working in a culturally competent sensitive manner, identifying champions is probably a huge risk… More importantly, it might be just getting everybody into championing evaluation in their everyday in small ways.

Some of the other responses supporting this included:

- I don't think we would use that language. In the Aboriginal cultural sort of frame, it's group centred, it's community centred, people aren't elevated as a one off – "You're the

champion. You're the best. You're number one." That's not part of the picture. The work you do, and the extent to which people respect it and likewise, as you respect work – people know who's the champion, but it's not labelled. (Alice)

- Maybe it is just a humble thing. I don't know. Evaluation champion. Champion is a bit of a word that, "Oh God, you don't want to be," or saying that you are champion of anything, I suppose… I struggle with the word *champion*… and just because, I suppose, it is a thing where you don't want to take credit for anything. (Sally)
- And very often champion – that word to me just has not a good connotation – only because I always think of a champion being for a period of time and then they lose their title… So, people, I don't think, have necessarily a positive thing about champions. (Sophie)
- Not a big fan of any sort of label, no… I think this is core business. For me, I'll be honest, it's about quality. And so everyone should care about quality of work. I should care about quality of work, it's part of my job. It's in my [position description]. Do your job. (Charles)
- I would not use that in this workplace. I would not say that. I'm trying to do that, but I would never feel as bold as to say that… So, I really hesitate using that word. Where I am, I wouldn't use that terminology. I wouldn't call myself that. (Wendy)

Participants also gave examples where management had imposed the title of *champion* upon individuals during the roll-out of a new system or change management process unrelated to evaluation. Without enough resourcing or training, according to Charles, it was not a proper process: "No resourcing, no training, no help. Lots of meetings, an incredible amount of work on top of their job. So it has connotations as token." The term was bestowed upon Michael as part of an inter-agency project, and it made him feel uncomfortable: "They're wanting people to do things and give them responsibility and authority, but they've got no legitimacy to be able to go and do it anywhere." In Jack's organisation the term *champion* was used as part of the identification process

to find people who would lead a project component, but when it came to the implementation, the term *champion* was substituted with a more appropriate descriptor: "'You're one of the keen beans… you really seem to enjoy it… it's great because we know it's not everyone's cup of tea'… and we try and show that appreciation… reinforcing positively the strength-based idea."

Without prompting, three participants mentioned they preferred the term *evaluation advocate:*

- I'd be an advocate. I wouldn't be a champion because I think *champion* implies that you're number one… Advocate for evaluation. (Serena)
- I certainly see myself as an advocate for evaluation, but I don't know about a champion. (Sophie)
- An evaluation advocate. You can be like an advocate of evaluation. Somewhere around like that. It's just a promoter. (Tahlia)

In summary, although the definition of a champion and the suggested activities resonated with participants, the label of *champion* was discordant; participants resisted being called a *champion*. They thought the label could undermine their efforts to promote a cooperative environment that would be conducive to encouraging co-workers to be involved with evaluation. The nature of the word *champion* is closely tied to sport and competition, and some participants gave this as one of the reasons they disliked the term. This connection, or more accurately tension, between competition and cooperation can be directly linked with the theory of social interdependence. The theory suggests that establishing teams based on competitive or cooperative approaches can affect the outcomes of the group. Chapter 6 will explore this tension with the label *champion* in greater depth. The next section will examine in more detail how participants worked with their colleagues to incorporate evaluation.

Strategies: How participants worked

The main ways participants promoted evaluation among their co-workers was by finding shared goals, providing encouragement, and ensuring the inclusion of diverse perspectives. This section expands upon the activities by documenting the ways in which, and with whom, participants promoted evaluation on an interpersonal level. It will also outline some of the communication barriers participants reported and provide examples of the strategies they used to include their co-workers in evaluation. The section concludes by examining the responses to the question about the sustainability of their efforts to embed evaluation in the organisational system.

Finding shared goals

Participants shared examples of explaining the importance of evaluation to their colleagues by linking directly to the desired social outcomes the organisation was working towards. Participants shared analogies that promoted a long-term, big picture perspective. They used events happening across the organisation as catalysts to promote evaluation as a tool that could assist. It was important to connect individual aspirations and organisational values with evaluation in combination. Participants found positive reasons why individuals should participate, identified the reasons why they were not able to contribute to evaluation, and then worked constructively to address the barriers so co-workers could support evaluation to facilitate the achievement of goals.

To help co-workers incorporate evaluation, participants showed individuals how they would personally benefit and, in combination, demonstrated how evaluation could help achieve organisational goals. As Jack said, “We have to do this [evaluation] because we need to somehow justify it [the program]. And we want to do it [evaluation] because we want to know if it’s [the program] useful. And we think you want to feel good about what you’re doing and keep doing it.” Serena made the connection between evaluation and her co-workers’ everyday roles: “Context is always good, because if you can’t put it into the context of that person’s everyday job, then they will totally miss it. So, they need to figure out – well, you need to bring them into the equation so that

they take on that ownership." Participants also identified the underlying reasons why their co-workers might resist evaluation, such as fear, dislike of change, risk of personal criticism, or time pressure. Then they found strategies that alleviated these issues and jointly found a place for evaluation in their shared scope of work, such as sharing analogies, playing participatory games, ensuring people had ownership over the process, learning together through experience, and undertaking group problem solving activities.

Some participants said understanding the motivational triggers for individuals was important because they may be the only factors powerful enough to draw someone closer to participating in an evaluation activity. Jenny's determination is evident in this quotation:

> I'm dogged, no question about that, absolutely dogged. And I don't apologise for that at all because I can see the value of it. And I work on people [laughs] so that they eventually see the value of it. And they may not see it in the same aspect as I do, but I will find something that will connect them to the importance of this area of work… You need to sell the benefit and try to demonstrate how it ultimately makes their job easier not harder.

Participants found shared goals by connecting their colleagues with evaluation to achieve the purpose of the organisation or by finding a way to connect evaluation to the motivations of their colleagues, or a combination of both these strategies. The essential element of the strategies that participants used was to keep the focus on the desired outcomes of the organisation. They attempted to ensure that evaluation activities were not just an end, but a personally connected means to achieving the core purpose. Personalisation and adaptability were important features of this behaviour. It went beyond connecting individuals to the organisational goals. Participants identified what aspect of the goals appealed to their individual co-workers and used that to make the connection to evaluation. They showed them how evaluation could be of benefit to help them in achieving their personal aspirations.

This vignette from Charles shares his approach of seeking out how the individual connects with the organisational vision and then finds a mutually beneficial way of moving forward:

Charles was in a middle management position and had to negotiate with funders, find financial resources, deal with demands from the head office, and find the right amount of enthusiasm to bring his staff from Aboriginal and non-Aboriginal cultural backgrounds along with him on the ongoing journey of change. He did not have any formal skills in evaluation, but critical thinking and reflective practice were evident in his early career. He prided himself on being a generalist with extensive networks that he could call upon to provide the technical support required. He worked with his team by tailoring his approach to meet the needs of the individual.

Charles thought it was important to show that evaluative information could help co-workers communicate the value of their work:

> *They want to feel like they're doing something meaningful, too. So it's not too hard. I think it's connecting their jobs, their work and their clients through to being able to speak succinctly to the quality, and for others to be able to speak to the quality of the work we do as well.*

The desire to communicate in a meaningful way about their work was mutual, but, unfortunately, the system was not set up for them to collect the information in a useful way. Recognising this as a flaw, Charles worked collaboratively with his team through a series of one-on-one interviews, workshops, and exposure to what other organisations were doing, to reorient the database and make sure that he could include their ideas about the required information:

> *What are the things they care about? Well, I cared about those things, too, so it was saying, "Well, in order to do those things you care about and I care about, these are*

the ways to do it, and this is what it will look like to do it." It doesn't take long… Once you get into a conversation about how they are and the work they do, 'cause that's what drives everyone, [co-workers] want to feel that they're doing it, either demonstrate they're doing good work 'cause they feel they are, or they want to do better work. It's really easy to tap into that… People have good ideas about things they'd like to do. So again being able to look at them in that space and look at evaluating that. That's encouraging them, that's a way to work that will enable you to do that. If we've got no means of proving anything we do, we've got no hope going and looking for more money. So we've got to have a story to tell.

Mary, an Aboriginal community development officer who lived and worked in her community, recognised that the most important issue for her was to ensure she tied the evaluation directly to the purpose of the project. This vignette captures how she used a combination of strategies to connect individuals to the project they were delivering, the related evaluation, and ultimately the desired social outcomes:

Mary began doing and using evaluation to help improve her social justice programs. Since she undertook a subject on evaluation as part of her university degree, she promoted evaluative thinking among her co-workers and members of her community. She shared analogies with people that helped them relate program evaluation with the evaluative decisions they make in the course of living their lives. Mary said,

Getting them to understand why it is important, as an evaluation. If you do a project, then what's the purpose of it? There's always the purpose of it. And we should demonstrate those purposes through an evaluation, [i.e.,] whether it is actually working for the community or not, and by including that and just explaining that to people.

There was an occasion where Mary set up a community reference group to seek guidance from the Elders in the community and to assist her to work in an appropriate way. This was a strategy to ensure that the evaluation was answering the questions the target group wanted to explore, everyone was involved in every step and the recommendations were relevant to meet the needs of the group. Mary said,

> *This was actually really important because it stopped me from making those assumptions all the time because I'd work with the women… the ladies actually learnt new skills, and I connected it with skills that they already knew into the evaluation. So that was a good stage to learn about.*

From a theoretical viewpoint, finding the shared goals or facilitating movement towards the common goal connects to the first element of cooperative teamwork, positive interdependence. Chapter 6 will discuss this connection in greater depth.

Providing encouragement

Participants in the research provided many examples of how they enthusiastically encouraged and supported their colleagues to engage with evaluation. Participants highly valued their positive working relationships with their co-workers. A positive mutually beneficial working relationship was the basis from which participants could encourage their co-workers to listen to what they had to say, engage them to assist, influence their work practices, bring their resources, harness their expertise, influence other people's behaviour, and persuade them of the potential for evaluation to assist the organisation achieve its goals. Participants also said they would avoid connecting evaluation with performance management and using confusing terminology and top down approaches. In all the strategies provided, a common thread was talking to different people at different times about how seemingly unrelated topics connected to evaluation. Making interpersonal connections among co-workers to find appropriate ways of incorporating evaluation

was fundamental. Table 8 groups the examples into key strategies, provides an example, and quotations from the participants.

Table 8

Strategies for Providing Encouragement

Key strategies	Examples	Key quotations
Start small and simple and find quick tangible wins.	Use tools like program logic or routine monitoring to assist with making work more proactive and efficient instead of reactive.	It's trying to show them that this is about value-adding and minimising the work that they're doing rather than maximising – rather than workload overload. Like it's not about giving them more work to do. This is a way of simplifying things that they are doing. (Sophie)
	Find the projects and people that are ready to use evaluation.	I'm just kind of chipping away one at a time. And picking on the people that are ready for it, and understand it and just doing the easy wins. (Wendy)
	Celebrate wins and congratulate colleagues by routinely providing feedback.	We do that every quarter. It's the *traffic lights* system. And you see people – they were striving for that improvement. They needed to go green. But it was maintaining the green too. So, you know we'd always do high-fives for this person. We'd always promote positive change. (Serena)
Take time to build rapport and provide emotional support.	Create and tend the relationships which enables them to make personal connections.	It's about relationships. So, for me, whenever we're trying to work with our staff, we have to work with them as an individual, as people, and then we move on to do the work, the complexities of our lives, so that relationship factor is really key. (Michael)
	Have as many conversations as required over time for colleagues to understand the benefits.	While the [evaluation] activities took much time implementing, you would also spend time with staff like a counsellor… You are sort of like a counsellor - although you are not… but it was important to sit and listen and before you get into work business. It was great getting to know staff personally rather than just on a work level. (Duncan)
Use positivity, humour, and fun.	Gather momentum among people who are keen to bring resistors along and remain neutral with negative people.	I've got a sense we're at early stages there… We need to do some analysis of them as well and then move to that next step… but we really want to embed local relationships. (Charles)
	Engaging participatory approaches can	We used staff meetings… we did a series of games – just to get everybody to remember. Everybody remembers eating chocolates. However, it also highlighted that they

Key strategies	Examples	Key quotations
	stimulate adult learning around evaluation.	were interested, and they were engaged because they actually did do the policy questions. (Serena)
Create opportunities for participation to generate engagement and maintain momentum.	Raise the topic of evaluation informally at meetings.	I like de-briefing with my colleagues and talking stuff through. I think that kind of often happens informally. I notice it happening at lunchtime and informally when we're sitting down, this kind of dialogue happened around what we've been doing with this project. (Alan)
	Incorporate evaluation in everyday conversation to prompt reflection.	And in the six months in between… chats to people around the water-cooler… It's asking those evaluative questions within the organisation. So, 'what's working? What isn't working? And what's going on? What do you reckon? Why do you reckon that's happened?' (Jack)
	Understand the situation of colleagues before sharing alternative possibilities they may want to consider or pursue.	So, I had to find something to bring everybody back together – to just keep things moving… So, we picked the priorities in terms of what we wanted to address first. (Serena)
	Incite curiosity by interrogating available data and ask questions in groups to challenge colleagues to think in different ways.	I think being curious and interested in improvement, raising the bar… you've got to think are we meeting our targets now, or has this project hit the mark? Then if you get a good news story and it has that, great, but mostly you don't. There's always a gap there, and then you've got to think, Okay, well we've now got 60% of the clients, what's happening with the other 40%? (Karen)
Make it personal by sharing analogies and individual journeys.	Connect evaluation with colleagues' lived experience and use examples that are relevant to their life.	Linking it to their everyday life and familiarising it with them. If someone, a mother might have some children, and they have to assess them daily… Just depending on the situation. We might have a bit of a yarn about that and talk about the best way to do it. It might not be in depth, but a talk will give some examples. (Mary)
	Use stories to connect individuals and evaluation to organisational goals.	I use story as a way of actually eliciting compliance and getting people to achieve… there's likely to be stories that I keep telling them. (Kelvin)
	Provide reasoning and experiences that are persuasive about the value of evidence.	So, I am a bit loud and a bit sort of – we had lots of fun… Evaluation is the *wow* factor. You've got to be able to say what's good about this or what's not working and be confident about it. And evaluation offers you that confidence… It's a very exciting area. (Sophie)

Key strategies	Examples	Key quotations
Promote the benefits.	Find relevant ways of communicating the same message to different people about the reasons why monitoring data needs to be collected.	So, you have to sort of present them with the benefits of doing it. And it's a lot of talking. I've never done so much talking in my life. (Serena) I think I bring a very positive, hopeful, fun - it's worth doing because you feel benefit. For me, it's a benefit proposition - I work with our team to see the benefits and the value proposition. (Alice)
	Use personal connections, persistence, and open communication to share benefits.	And making sure people see the value. If there is not value, and people don't understand why they need to evaluate, or why they need to monitor, if they don't understand why and what they are doing, then they are not interested. (Wendy)
Connect individuals who can help each other.	Use the group dynamics to foster positive relationships around evaluation experiences.	Like I always remain open to the one-on-one conversations with people, but what I'm actually starting to do is actually find people who are in the organisation who are able to have those conversations as well… 'Go and talk to this person' and he had different perspectives about why we've come to where we are. (Kelvin)
	Recruit, support, and develop additional allies.	I'm lucky there are a couple of other people who are allies in that. You can't keep going as the lone voice without allies. And then the allies multiply over time because it's not just one. (Jack)

This vignette from Wendy provides detail about the role she played in supporting her peers to be engaged with evaluation:

> *Wendy, working in a project-level position, had attended a workshop on evaluation that sparked her interest. She identified a gap in the organisation where she could help by doing more evaluative activities. After showing the value of this work to management, they asked her to support staff with monitoring and evaluation. One of her main tasks was to act as a knowledge broker among management, her co-workers, and the funders when they were having difficulty meeting the reporting requirements. Employees were frustrated with the funding body because they changed their reporting requirements within the same reporting period. Using her negotiation and facilitation skills and ability to see different perspectives,*

Wendy managed to find common ground and progress their working relationship. Wendy said,

> *That's a really big difference that people don't understand, or our funders don't understand, is that the clinician only cares and only wants to evaluate the individual service they are providing to the client. That one-to-one. Real micro-level. But funders, the government, want to know across our whole cohort, as that population health, what is the outcome of the whole population? So there is a big difference in how you collect the information and how you evaluate it… But we are working on that as an organisation to try and get staff to understand it is not just the one-to-one patient stuff, it is collecting that for everyone because we want to know about the whole service and the whole program.*

Wendy did not have any direct reports, but she spent time managing up and horizontally to influence the way the organisation implemented evaluation activities. She found the right time and place to engage with people to bring them along on the change process and tailored the information so the diverse groups she was working with could see how evaluation could benefit their work. Wendy believed evaluation became routine when there were multiple reasons for that task to be embedded into an organisational process.

The findings examined in this section, providing encouragement, have connections with the promotive interaction element of cooperative teamwork. Chapter 6 will explore these connections with the theory of social interdependence in more depth.

Being inclusive

To ensure the highest quality evaluation initiative and work of the organisation overall, participants recognised the value of facilitating the inclusion of as many people with different worldviews as possible. Participants provided numerous examples of communication tensions and

disconnects in their workplaces. However, while they understood the potential for there to be communication barriers in a non-profit context, they were more concerned with how to include their co-workers' views and encourage, support, and empower others to participate and contribute in meaningful and appropriate ways.

A major barrier preventing the participants' co-workers from taking part in a conversation about evaluation was related to administrative issues. A layer of disconnect often existed between the organisation and donors or funding bodies. Tension existed between funder expectations and the reality of what was possible, as illustrated by Charles: "They were just driving the staff crazy with their forms and tools, and it was just overkill… We've got to give them a leg up for some of that stuff." As noted earlier, Wendy, working in a project-level position, was experiencing serious levels of frustration with their funding body who were inconsistent with their expectations: "There is a lot of disconnect." To forge an inclusive pathway to evaluation, participants had to break down the barriers among the team, management, and funders. They acted as brokers who acknowledged that everyone was interested in different things. Participants used their knowledge about the different communication needs and styles to adapt the information and include multiple audiences.

The second layer of disconnect, where participants had to find strategies to include as many people as possible, was in relation to evaluation terminology. Participants had to translate the terminology and processes related to evaluation in different ways to varied audiences to make them acceptable, meaningful, and eventually useful. Alice called herself a "code-breaker" and an "interpreter" and gave this example of how inappropriate evaluation terminology can be:

> Even to say something like, "Look, I think we'll probably need to do a program logic on this." What does that mean to most people? Nothing. Nothing. So, I always avoid all that stuff. I read it myself, and I try and learn and then sort of be an interpreter and minimise the switch-off factor that goes with listening endlessly to a language and a thinking process that

> doesn't fit with the reality of an Aboriginal community organisation and working with women facing family violence.

Similarly, nearly half the participants, predominantly from the project level, explained their roles as a translator using phrases such as "able to translate" (Jack), "unpack the different" (Michael), and "translate that into something to share" (Judy). As Wendy said, "I'm helping translate the language of evaluation through other staff and our services."

While asking about the ways that participants worked to overcome communication barriers, the research included a specific question about their strategies for communicating appropriately in culturally and linguistically diverse contexts. There were two reactions: some were reluctant to answer, while others reacted negatively to the question. For example, there were comments such as, "I don't think it's any different… We just have cultural awareness and people awareness across everything we do" (Charles), "We're all human beings" (Mary), and "There was nothing out of the ordinary that we had to be mindful of. No, there was nothing in relation to that" (Sally). Many participants did resist the notion that they were tailoring their approaches in relation to the concept of being culturally appropriate, such as Michael's comment: "I try not to look at the diversity, I just try and look at people. There's almost this political correctness that drives a thinking and a language."

Some participants who were willing to discuss their strategies framed their response along with other forms of diversity. For example, Fred gave this response: "I think definitely because it is so culturally diverse and because you've got people from such a range of backgrounds, you have to do a multi-pronged approach, an approach which can change and cater for everyone's needs." Sophie said, "Whether your audience is black, white, has disability, has mental illness issues, whatever it is, I'm always of the view that we adapt things to our audiences all the time." Judy connected the question to tailoring her communication for young people, and Tahlia said it was

about differences in attitude and willingness to be engaged: “I always think you’ve gotta have a look to see who is engaged… Gauge your group.”

Most participants were unwilling to delineate individuals on cultural and linguistic grounds, but instead considered multiple kinds of diversity. This approach underlined the strategies they deployed. Participants acknowledged that in their teams there were not only people of different cultural and linguistic backgrounds, but different ages, genders, levels of engagement with technology, educational backgrounds, location (urban or remote settings), levels of tolerance of administration, and different learning and engagement styles. Participants recognised they had as many people with different worldviews in their team as they had people in their team, but they did not single people out based on any one of these characteristics. They wanted many different people to contribute to enhance the work they were doing. Participants worked to make sure everyone had the opportunity to make a valuable contribution. As Jenny said,

> So I think that that brings you to a point where you’re constantly talking to people whose voices have been silent in the past… Diversity actually helped people understand about the needs of the other group in a way that we might not have been able to show in any other way… I think that there was a whole lot of extra learning about life and program possibilities and other community needs, aspirations, and desires: conversations that may not have been able to be had before.

Despite resisting answering the question about communication strategies in culturally and linguistically diverse contexts, participants provided numerous examples of tailoring their approaches to meet the needs of their co-workers. Instead of adapting their behaviour for a specific cultural group, participants developed communication strategies that offered many different options. The aim was to reach as many people in their team as possible. Participants attempted to tailor each one of the messages they were trying to communicate, or ways of seeking information, from the entire team down to the individual level. There were examples of participants working in

inclusive and multimodal ways. Most recommendations from participants for dealing with conflict around evaluation or with people who had negative experiences with evaluation echoed answers from prior questions about promoting evaluation and being inclusive. Table 9 combines examples of the strategies they used to deal with logistical issues, overcoming the use of jargon, and accommodating the inclusion of the wide range of diverse co-workers with key quotations.

Table 9

Strategies for Inclusive Communication

Communication strategy	Example	Key quotations
Cultivate relationships and use personal connections to clarify the purpose of the interaction and make relevant for that individual.	Articulate the common vision in a written, visual, or oral format that is meaningful for the individual and connected to the purpose of the organisation.	Lots and lots of pictures… So, what I did with people was actually talk to them about what I see and what the impact of what I see is… You give people that perspective… Where they fit in the big picture. (Kelvin)
	Take time and opportunities to understand how your own worldview is different from others.	Those words around respect and humility and reflective practice are really important. I think working across cultures is a great opportunity which people are stupid not to pick up to reflect on their own cultural values. The journey is often within yourself, 'cause it's only then that you realise the world you come from has this frame. The philosophical underpinning this set of values, and while they're yours, they may not be others, and they are not one better than the other. (Alice)
	Identify preferences for learning and engagement styles and accommodate preferences into all interactions.	What each person brings to that place. Because each person has a different role. It's important that everybody is included. So, when we're looking at evaluation, that person's interpretation, or comment will be different to this person over here. So, their angle might be a bit different, so you want to try and get as many angles as you possibly can, because something that works for Joe Bloggs over here, might not work for Joe Bloggs here. So, it's about that learning style, and trying to understand how individuals learn, because not everybody is the same. (Serena)

Communication strategy	Example	Key quotations
Decentralise decision making power and enable voices that are not usually heard to actively participate in all aspects of the evaluation.	Enable and support all members of the group to actively lead the process, allocate responsibilities, approve design, drive implementation, interpret findings, and control what happens to the information.	So, the research component, you know – when you look at the history around research, and what's happened, we sort of steer away because of all the negativity attached to that. But now I think we might be in a place – well, we are in a place, as we progress, to actually change that mind set. Well, it's starting to because we have Indigenous evaluators, Indigenous researchers, and you know, so, it is changing. And – well, it's evolving. (Serena)
	Create a supportive environment where everyone respects each other's opinions and sharing feedback is encouraged in an appropriate way.	I think it is important to remember that people are entitled to their own opinion… everyone needs to respect one another with their opinions. Talk about if they have any feedback, during the process, they might have something… Safe environment, yeah… Feeling safe to express. (Mary)
	Collaborate with others who already have pre-existing relationships and connections who can provide guidance, support, and advice. Eg. community reference groups, local committees, or advisory groups where colleagues, participants of the evaluation, and community members can provide advice on the evaluation and exchange skills.	Some of the [Female participants] became part of the reference group, critical thinking group or we called it the community reference group. (Mary)

Communication strategy	Example	Key quotations
Use participatory approaches that allow people to choose their style of interaction and approach to learning and communicating.	Collect the data in variety of ways, share the information in multiple formats, and tailor the communication to the specific audience with the options determined by the people involved.	Creating learning tools that were different, tapping into different modes of learning to get people where you need them to go, visual, aural, face to face, and continually doing it. Very intensive really. (Fred)
	Find creative ways of engaging people with evaluation and embedding alongside other activities.	They used a lot of music and video recording to capture what they were doing and so on. I think using different tools and techniques, telling the story… Some of the Aboriginal people kept saying "That chapter isn't telling me anything," and especially if it had a lot of data in it. Even though it was written what the analysis was, and they felt that it didn't capture the journey, or the story. So, you'd sit together and write vignettes. (Karen)
Take a capacity building, community development approach and harness the strengths of the team.	Consider and align the evaluation task to the skill set of the individuals involved.	So, I think that ensuring that everybody has a place and really recognising skills and capacities of the people and using it. (Michael)
	Provide practical examples, model the evaluation tasks, and facilitate involvement at the right level.	Because people should just be doing it themselves… often they don't because it's the facilitation of it. I think that is the key. The bringing of people together. You have hands on and then hands off, hands on and hands off. (Karen)
	Facilitate everyone's involvement by building capacity with some in advance before engaging in formal interactive sessions.	You've got to understand dynamics… you have to set those up when you're doing the workshop – you have those group rules. Everybody has a voice… so if you can't get it in the workshop, you've got to find different mechanisms, or ways, or approaches. (Serena)
	Use the skills of knowledge translators and knowledge brokers to reduce jargon and make evaluation terminology relevant and meaningful.	Evaluation requires communication, being able to plain language things as much as possible and get away from the evaluation jargon – that's sometimes a disincentive to getting evaluation professionals to talk to us… being able to then translate what they say in to how we might think about it. (Jack)

Communication strategy	Example	Key quotations
Work at a pace that allows colleagues to consider multiple issues.	Take time to collaboratively work through challenging ethical issues to ensure the process is appropriate for context. Find opportunities for reflective practice to routinely occur in the project implementation cycle or day-to-day work.	And that's why the conversations with people around how that conversation happens, the time to delay, the time for people to take things slow. (Kelvin) I think what works best is getting people to think of some questions they'd like to ask themselves about what they're doing and to build that into what they do on a daily basis. And although that seems simple, I think that can be quite hard for people to do. I think that gives you a very rich and raw sort of material to work with. It means that you actually are doing things on a *real* basis. (Sophie)

Alice was a white Australian project officer based in an Aboriginal community-controlled service organisation. This vignette highlights the multiple strategies required to ensure that a conversation about evaluation was accessible to as many of her peers as possible:

> *Alice was aware of the demands placed upon her co-workers and how much of a stretch it was to evaluate their work. However, she found ways to negotiate the challenging environment and facilitate appropriate ways of evaluating that generated interest among the team, captured the attention of managers, and received positive feedback from funders. Forming a long-term partnership with an external evaluator, Alice brokered some participatory developmental evaluation activities that gained momentum and became part of the way the organisation did business. The team started a "working wall" where they stuck recorded written and visual ideas on the wall of their lunch room. The pictures, drawings, and maps prompted further discussion and, after a series of workshops co-facilitated by an evaluator, eventually did evolve into a useful program logic communication tool. Alice said,*

This is part and parcel of our practice – lunch is always in this big spot – a big cultural place – and whoever is there, we talk about what we've done and where we're heading. It's sharing that meal and having a chat. It doesn't always happen, but it's providing a really good focus for us to reflect on what we do, what's coming up. Sometimes it's just very practical, but other times, it's really deep. Now, I don't think we're capturing it all, and we don't really have a framework yet. We're going to work towards it to capture and hold that really rich information.

Duncan, an Aboriginal practitioner, wanted to investigate the impact of the program he was working on and seek feedback on his own work. However, Duncan's interest in evaluation was instigated by being involved in a process that supported diverse voices from across the organisation to be heard, as illustrated in this vignette:

Duncan had worked in the non-profit sector for over twenty years and had seen a lot of things that did and did not work. He had also experienced the feeling of being isolated from other parts of the organisation and not having much influence or control over things that occurred at a higher level. This changed after he participated in an inclusive continuous quality improvement process. "I did like this process because I thought it was just engaging the whole health sector. So, it engaged health workers. They also engaged cleaners, drivers. So, it was about engaging everyone. So, I did like that." Duncan valued the opportunity to be involved with data sharing events that started in his own organisation and eventually expanded into collaboratives between non-profit and government organisations. He said,

Never heard this before… This is really good. It's not just nurses are having their meeting. Doctors are having their meeting. It's everyone working together. I did think that was such a great thing. And always being positive about it. I thought it was quite good so I was always coming to the collaborative and letting them know, "This is really good." And promoting it and going back and promoting it and talking.

Duncan continued to play an instrumental role in supporting co-workers, Aboriginal and non-Aboriginal health professionals, and support staff, such as drivers, to be engaged with the process. He said,

> *At many remote health centres in the Northern Territory, the staffing is a mix of Aboriginal and non-Aboriginal. I think with working in that sort of atmosphere is quite good as well. People are bringing in their different skills and cultures and all that sort of thing. People have different ways of working and with a mix of cultures; you have to be able to work with this when coordinating CQI [continuous quality improvement] activities.*

He was instrumental in ensuring that the processes were embedded as part of routine operations as he acted as a constant probe to keep things progressing and finding ways to overcome obstacles. As an Aboriginal health professional and working in a location where the Aboriginal culture was different from his own, he worked to understand the many different perspectives and motivations of all the people he worked alongside. It was critical for him to understand where people were coming from on an emotional level and support them to see the value of evaluation for their work. He used his highly developed social skills and provided a significant level of emotional support. Duncan personally drew upon external evaluation expertise for support and used his networks and professional connections to link individuals together if he thought they would get value from exchanging experiences.

This research can align the strategies participants used to increase the likelihood that evaluation would be appealing for their diverse co-workers with the cooperative teamwork element of social skills. Chapter 6 will discuss this alignment with the theory of social interdependence in more detail.

Embedding evaluation

This section so far has presented how participants found shared goals, provided encouragement, and were inclusive of their colleagues in their efforts to promote evaluation. This segment will examine participants' responses to the question about strategies used to embed evaluation in the organisational system. It highlights how the answers to the question about the ways and extent to which participants supported evaluation to be embedded within the organisation system were similar to the responses received regarding the question about promoting evaluation. This research found that although participants actively promoted evaluation, they were not always able to ensure that their efforts were sustainable. This segment examines their strategies, which connect with the promotive interaction element of cooperative teamwork, and highlights where participants felt their efforts were unsustainable.

Participants' strategies for embedding evaluation included linking evaluation to the benefits the organisation was seeking, demonstrating how they could use evaluation for advocacy, and using evaluation recommendations for improvement. Similar to finding shared goals as a way of promoting evaluation, participants suggested that the best way for them to embed evaluation was to help their co-workers to understand the value and purpose. Participants garnered support from different sections of the organisation, sought expertise from their networks, and adapted tools from others. They opportunistically connected evaluation with other plans, kept evaluation on the agenda, and requested or allocated budgets for evaluation. Participants kept evaluation simple, manageable, useful, appropriate to audience and context, and used persuasive communication techniques.

This vignette from Judy illustrates how she was able to successfully incorporate evaluation into her small organisation of fewer than five people and influence other organisations they were working in collaboration with:

As a result of being involved with an evaluation and interaction with an external evaluator, Judy recognised the power of evaluation for advocacy purposes. As the CEO of an organisation delivering a service to young people in marginalised communities from culturally and linguistically diverse backgrounds, she used her influence to guide her staff and the leaders of other organisations to support monitoring systems to be put in place. She grappled with the need for independent evaluation in a context where rapport building and relationships built on trust were so important for reliable and accurate information to be sourced. However, she developed a critical-friend relationship with an evaluator to overcome some of these challenges. Judy said,

> *I think the big lesson for me is knowing that you can do some simple things in the evaluation space. That it doesn't all have to be big, hard, long, challenging. That really, as long as you can think about coming back to that purpose, what do you need to learn from this? You can make it manageable…. So the great thing about my experience with [External Evaluator] has been working on those ways to make things happen simply and easily. And even if it is just a first step, that still has validity.*

This vignette from Sophie demonstrates her awareness of the high levels of energy and enthusiasm required to support a team to embed evaluation into the way the staff did business:

In a management position, Sophie crafted and tailored strategies until her co-workers could see how using evaluation could help them to contribute to the organisational goals. More challenging was supporting other managers to see the benefit of evaluation. Sophie recognised the need to have leadership support if evaluation was to be embedded in a sustainable way across the entire organisation. Sophie said,

> *I'm a very positive sort of person. I have lots of energy and enthusiasm and interest. And I always see things as a challenge and as exciting and as interesting. But I think there's a whole range of ways you could do it. But I think it's about putting*

evaluation up as part of what we do and taking the fear out of it. Creating that energy around it and excitement around it. And saying to people, "Go and find some tools that you'd like – that you think could work," like, "Let's try that. Okay? You're saying that's a new tool. Let's have a look at it. Let's try it out, and if it doesn't work, we can change." So, I'm very much up for, "Let's see how we go with it."

Some participants thought embedding evaluative thinking was a good approach where they attempted to make asking evaluative questions part of the way the organisation did business. Another participant used an empowering process for staff to access their own data and generate further demand for evaluative information. Some participants also gave examples of where they built evaluation systems and tried to embed evaluation into processes, policies, and procedures. Examples included incorporating evaluation into job descriptions and integrating evaluation into the project management cycle so it became routine. Participants attempted to embed evaluation into the system by incorporating opportunities for reflection into meetings, infusing logic models across the organisation, and routinely sharing evaluative information between different parts of the organisation.

However, even though participants excelled and had greatest impact through small wins that were about generating enthusiasm for the potential of evaluation, many of the participants believed if they were not there advocating for evaluation, the initiatives and what they were working towards might collapse. Judy was aware of how precarious embedding evaluation as a routine process was because, although she infused enthusiasm in her team, there was minimal capacity in the organisation for this work to continue if she was absent for any length of time. When she went on leave, she found: "That stuff instantly falls in a heap." Jack made a similar pronouncement: "Without having also an allocator, or a voluntary champion, or a few – then I think that also makes it hard to sustain… I fear that if I left them tomorrow, it might all stop, or it might not keep happening in the same way. Or it might be a shadow of its former self." Sophie made this recommendation:

> There's only one thing that will work to keep it sustained – and that is commitment - total commitment from senior executives and the board. Unless it's written into a strategic plan, and then down to the business units, or planning departments, or service areas, or whatever – unless it's actually written there – it won't happen. It will happen on an ad hoc basis, it will happen for particular programs, depending on funding, and depending on program constraints, and depending on who's going to evaluate this. But if you really want a reflective, evaluative organisation, my belief is that there really does need to be part of who the organisation is from the top. I would prefer to have an organisation that was, "This is who we are. We are… an evaluative thinking organisation. We use evaluation." It's embedded in their strategic plan and their business plan and in everything they do.

Participants recognised themselves as people who could keep the momentum going. Their prodding, suggesting, cajoling, promoting, prompting, and encouraging were what kept things rolling. Their co-workers were predominantly not self-driven to continue taking the time to undertake evaluation. The busyness of everyday work soon took precedence if the participant was absent for any length of time. Fred gave an example:

> I saw very quickly when I took the foot off the accelerator a few times that there is a really strong danger of all of that work disappearing and people going back to their habitual ways of working. So I think you have to have that champion there, and if you don't have that person pushing for that excellence and evaluative thinking and that continuing to build in ways for continuous improvement, then it'll fall down.

A large proportion of the participants' roles was related to interpersonal interactions. Without continuity, evaluation could disappear. The interpersonal skills were where participants excelled, applying the right amount of pressure to the right person, in the right way, at the right time for decision making and for evaluation initiatives to catch on.

In summary, participants expressed concern about how fragile and unsustainable their efforts were to embed evaluation without their direct input. From across the large volume of strategies shared by participants, this research could only make connections with three out of the five elements of cooperative teamwork: positive interdependence, promotive interaction, and social skills. There were only limited examples that related to individual accountability and group processing. Chapter 6 will examine the possible reasons why there was a lack of strategies connected to these elements of cooperative teamwork.

Motivation: Why participants were interested in evaluation

Making a positive difference to others in society was the link between why participants were working in the non-profit sector and why they were interested in evaluation. This section presents participants' motivations for working in the non-profit sector and illustrates how these aligned to their reasons for wanting to engage with evaluation and involve their colleagues.

Motivation for working in the non-profit sector

Participants responded in three main ways when asked about the reasons they worked in the non-profit sector: a desire for social justice, connections to community, and personal experience. Social justice was the predominant theme, with community connection and personal experience frequently appearing in combination. Other, more practical reasons reported for choosing the non-profit sector related to their education levels and workplace conditions.

Participants referred to their desire for social justice in terms of a philosophy or personal driver. Tahlia said, "That's my purpose, is to try and help people… You're here to help people. That's what life is about. That's my philosophy." Some participants made explicit reference to social justice, as in this statement from Jack: "It's a contribution to social justice… social benefit and improvement." The type of work the sector undertakes was attractive to participants from early stages in their lives, and they discussed how this shaped their entire careers. Sophie said, "It just

seemed to be something that I was drawn to at a young age in working with people, particularly young children with disabilities." These personal connections highlighted how the roles the participants had in their organisations were more than just a job and more than a means to earn a living. Participants' sense of self and purpose linked inextricably to their role in the non-profit sector.

Connection to the local community also appeared as a theme in the interviews. Some participants found that the connection to their community gave them a sense of personal satisfaction and higher level of reward than any additional monetary compensation attached to a role in another sector. Participants shared examples of enjoying working with their peers and community and feeling part of something bigger over the long-term. Understanding, being close to, and being able to promote positive change among their communities were all mentioned. As Wendy said,

> I like it. I get it. It is closer to the ground. It is closer to where people are… I have a close affinity to my local area so I am about helping my community. It is a low socioeconomic community… We are making a difference. I hope we are making a difference.

A few practical reasons also clarified why participants were working in the sector. The ways of working resonated with the individual styles of participants. They liked the pace of change and being able to be adaptive, flexible, and responsive, as noted by Karen: "They're very progressive, and they can move quickly, they can change. Change management, it can be much quicker." Participants also mentioned an active dislike of bureaucracy, the restrictions placed on individuals in other types of organisations, and the tighter requirements for formal qualifications. Most participants did not have qualifications at the tertiary level before commencing work. As their careers progressed, they often obtained qualifications at the certificate, diploma, and graduate level. Many described how it was their personal skills or an opportunity to volunteer that led them to engage with the sector. None of the participants, when they were in high school, had envisaged a career in the non-profit sector and decided to obtain relevant qualifications before seeking employment. They instead

referred to serendipity playing a role. Many participants made statements indicating they "fell into some voluntary youth work, [and] thought this is what I want to do" (Charles).

Woven through the recounted experiences of participants were the themes of improving people's lives, making a difference with local community, forming strong relationships, fostering a commitment to the organisational purpose among peers, and finding a useful outlet for personal aptitudes and skills. This vignette from Jenny highlights how her personal experience, sense of community, and a desire for social justice were all interconnected in shaping her career in the non-profit sector:

> *Jenny was a young pregnant woman living in a new suburb on the outskirts of a major city. She felt isolated, with no sense of connection with the local community. Jenny did not believe she was the only person who felt lonely so she wrote a letter to the editor of the local paper asking if any other women were feeling the same way. As a result of the letter, she received over 20 phone calls. Jenny decided to hire the local hall, encouraged everyone who called to meet at the hall, and bring a friend. She formed a women's group that met on a fortnightly basis with everyone contributing some money to cover the hire of the hall.*
>
> *The group eventually became part of a larger women's and children's social service organisation. Jenny commenced in a volunteer position until they invited her to become a board member and then a staff member. Jenny worked for the organisation for many years in a range of local, state, national, and international roles. Jenny said this experience was "an opportunity to learn skills, meet inspiring women, and change the whole direction of my life." The organisation supported Jenny to obtain formal tertiary qualifications in Women's Studies and Community Development*.
>
> *At the time of interviewing, Jenny had just come to the end of a long-term partnership arrangement with an external evaluator to undertake a developmental evaluation. The context was challenging as Jenny was not of the cultural background of the target group and*

there were multiple sites, stakeholders, funders, and huge geographic distances to cover. Jenny had to initially convince her managers of the benefits of developmental evaluation, find financial resources, take time to cultivate relationships and trust, and establish processes that ensured that members of the target group held the decision-making power. Building the capacity of the target group and bringing the leaders in the organisation along on the journey were key priorities for Jenny.

Motivation for engaging with evaluation

Participants' motivations regarding evaluation related to their overarching aspirations for why they worked in the non-profit sector. The connection with evaluation came from the key notion of *making a difference*. The concept of evaluation resonated because all participants reported being intrinsically interested in documenting the value or worth of the project, program, or policy they were undertaking and making comparisons with alternative options or approaches. Jenny succinctly stated the sentiment in this way: "It was about our work and how we could improve it for the betterment of others." Participants said they were not content with just working hard, being busy, and feeling like they were doing good work. They were not satisfied with just thinking or believing they were doing a good job, but were searching for ways to prove to themselves and others they were achieving the desired change. Participants were generally open to engaging with a variety of other people to seek supervision and constructive criticism. Charles noted that this way of working is not explicitly incorporated into the way non-profit organisations routinely operate: "That's all practice, which is linked to supervision, which is part of an ongoing reflective practice… something that is just crucial in our sector, and we don't do enough of."

Participants reported being intrinsically motivated to include evaluation in their everyday practice because they could use it as a tool to assist with their ambitions to improve people's lives, make a difference, and contribute to positive social change. Using evaluation for improvement purposes was highly valued when they could incorporate recommendations to increase

effectiveness, efficiency, or the level of client satisfaction. Participants wanted to improve, learn, and build their own capacity and the capacity of their co-workers. They could see the value of evaluation for accountability purposes. They said they undertook tasks in their organisations, delivered programs, or managed projects that all had a purpose of making positive changes in people's lives, and evaluation was one tool, among others, that was of assistance. Adaptive management, social impact assessment, participatory action research, and collective impact were other approaches participants mentioned they had also explored.

Many participants asked themselves a series of questions to understand their work on a deeper level. Some of these questions included: "Will this benefit our women?" (Alice); "What's working?" (Allan); "Is this actually helping?" (Charles); "[Is] what you're doing is getting any impact…?" (Duncan); "What else do you want to know about your work? What's been happening with this group compared to when I first started?" (Fred); "How can we use this to help address or improve or come alongside? Why do we think it's working?" (Michael); "How are we doing it [programming], what are we doing, and what are we doing well?" (Sally); "Why we're doing this? What do we want to get out of it?" (Tahlia). Sophie reported asking herself these questions at every stage of her work:

> I like to think of evaluation as a bit of a circle, in a sense – of trying something and then asking some questions, "How did it go? Why does it go well?"… [Evaluation is] used to ask those critical questions about whether things are going the way that you want them to go from your very beginning.

The interview data supported the conclusion that participants wanted to use evaluation to see whether their projects, programs, or policies were achieving what they set out to do and if there were ways they could improve. They wanted accurate information so they could make changes if the conclusions demonstrated the programs were ineffective. This quotation demonstrates how

Wendy's thinking differed from some of her peers in her organisation who were not interested in the depth of analysis that she was seeking and highlighted her need for evidence to support claims:

> Everyone [co-workers] says, "Oh, we did a great job!" How did you know? Did you ask someone? Did you collect information? Did you ask the participants whether we did a good job? I'm kind of driven by making sure that we are not just saying that we did a great job, but we are collecting evidence and have a basis for our judgement. That's what is keeping me going… I'm trying to embed it everywhere. In everything I do, asking, "How do we know this is working?" (Wendy

Many participants also reported that in the political context in which their organisations were operating, they needed answers to these questions to meet the multiple demands for information. Judy's organisation faced serious funding cuts, and her co-workers wanted to call a meeting with the funders to lobby for funding to remain in place. Judy replied, "We talk a lot about the impact of our programs being life-changing. If we're going to make a claim like that, then we need to have something that tells us that is right - that's a valid claim." Most participants recognised they needed evidence for their organisations to be legitimate, to meet funders' expectations, to communicate the benefits, changes, and lessons learned to multiple audiences, to assist with advocacy, and to demonstrate what was possible to future funders.

Learning and capacity building as part of the process were also reasons why participants wanted to include evaluation in everyday organisational activities. They saw evaluation as a tool that provided opportunities for continual reflection, learning, and sharing among co-workers and clients. Some participants said evaluation could help communicate the long-term vision and help individuals find their own worth in the system. As Alice said, "I think it's the absolute buzz you get when you see people growing; when you can see people you work with grappling with hard stuff and then getting over, bit by bit, little challenges." Participants recognised that sourcing training on evaluation approaches put them and their peers in a good position for enabling them to build their own

capacity. However, recognising that the non-profit sector was moving to an increasingly accountability-focused context, participants said they were keen to search out relevant approaches that would satisfy the demands of multiple audiences who were involved in funding their work, learning from their work, or wanting to hear about their work.

Similar to other participants, Karen's path initially included asking monitoring questions as a seemingly normal part of doing her job, but then evolved towards another level of interest, skill development, and engagement with evaluation expertise. The vignette below highlights Karen's experience and is representative of many of the participants' initial engagement with evaluation:

> *Karen was working at a neighbourhood centre and undertaking a needs assessment to determine the levels of attendance and identifying what programs the participants would like to see offered. The process started with a community consultation, but became more about looking at the available data to see if what the people said they wanted was evident in the participation data. Karen thought to herself, "That doesn't match what people said and their behaviour's different, and I wonder why?" Karen was not going to just cancel the program; she was interested in exploring why this was happening. The situation posed some challenges for Karen and the community development approach she had been adopting up until that point. The participation data were contradicting the requests of the community members and meant Karen had to commence a much more in-depth investigation to ensure that the programs were still meeting community expectations, but had a greater chance of being appropriate for a larger number of people.*
>
> *This experience caused Karen to start talking to various experts to assist her in navigating what to do when data contradict the expressed needs of the community. She talked with external evaluators about what approaches she could take to monitor adjustments in implementation and test some of the variables. Upon reflection, Karen realised this was the start of her career supporting continuous quality improvement in organisations.*

At the time of the interview, Karen was working in a project-level role in an organisation where the employees from Aboriginal and non-Aboriginal cultural backgrounds highly valued monitoring data and evaluation information. She was supporting a culture of using data to understand what was happening, consider improvements, make comparisons with external data sets, and solve issues in the system. To keep this momentum going over the long-term, Karen used a wide range of strategies to make sure all members of the team were engaged. This included taking time to foster ownership, supporting people using an empowerment approach, and mitigating risks. Karen said she had learnt a great deal from external evaluators and continued to use her networks to seek expertise and support.

In summary, participants were motivated to work in the non-profit sector because of personal experiences, their connections to their community, and because they had a desire for social justice. They were motivated to include evaluation because they wanted to determine if their efforts were making a difference. The final section aims to assist with recognising the inherent features that enabled participants to effectively work with their colleagues around evaluation.

Attributes: Features that enabled participants to promote evaluation

The sections above presented participants' activities, strategies, and motivations. This section extends those findings by presenting the inherent features that enabled participants to promote and engage with others around evaluation. It examines the interviewees' self-reported attributes, in response to questions about their personal features and qualities, and groups the responses into knowledge, skills, and attitudes.

Participants said they were adept at brokering knowledge among different groups, promoting evaluation to others, and using their networks to find the expertise needed to implement the task. Their skills were reportedly about supporting co-workers and facilitating the engagement of other people's talents and expertise. Participants also said they needed to demonstrate positivity and perseverance to work in a context where there was resistance to evaluation. The examples in

Table 10 represent those that participants repeatedly emphasised. Although not all participants demonstrated all these examples, similar to the activities from the proposed definition, there was a high level of saturation. Illustrative quotations accompany each example.

Table 10

Attributes with Examples and Key Quotations

Attributes	Examples	Key quotations
Knowledge	Experiential learner, lifelong learner	I tend to want to capture – I want to capture learnings from the stuff that I've done so it doesn't go to waste. (Allan)
	Someone who seeks out expertise and implements new knowledge	Always take your lead from people who have that experience expertise. (Sophie) I'll always go back to any evaluations that we've done and say 'Well what have we done with that, and have we refreshed the strategy based on what the evaluation said?' so I won't let things sit on shelves. (Karen)
	Critical thinker	Critical thinking – I can't remember not ever critically thinking… Yeah, always. I annoy people with that all the time. (Jack)
	Generalist	I'm very generic. I know a little bit about quite a few things… you make a choice not to be a specialist… So now it's about using the opportunity to be a generalist and have a degree of responsibility in the organisation to embed all the things that come around that. (Charles)
	Adapter of information and tools for different audiences	I've provided tools and sourced some tools and adapted tools. (Jack)
Skills	Supports, encourages, and promotes evaluation to colleagues	I think it's about putting evaluation up as part of what we do and taking the fear out of it. (Sophie)
	Uses networks	I think that's probably why I am sitting in the Special Projects role because I can be the *connector* to further this work in a range of ways via peer support, mentoring, and other mechanisms. (Jenny)
	Listens and communicates effectively	It is really honing in on the types of communication you need for diverse groups to get that detail across, get the concepts across, and get the common vision across. So that when people are working towards that

Attributes	Examples	Key quotations
		common vision, they become much more self-directed and can see where they are going. (Fred)
	Models desired behaviour	It's been a great opportunity to really critically reflect on our methodology and what works and what doesn't as well. (Allan)
	Develops rapport by being respectful, humble, empathetic, and inclusive	I think I've got a lot of empathy. And I use all my experiences to you know understand someone – just understand. (Tahlia) I think I've always been one of those people who's been strong about working towards everyone being involved, moving forward, seeing opportunities for change, and then celebrating them. (Alice)
Attitudes	Positive	I think you mostly need a positive attitude towards evaluation. (Mary)
	Persistent, tenacious, resilient, patient	Don't be afraid of it [evaluation], but just be patient and just work out, just unpack the different, be patient in understanding the different frameworks, and the different language, and the different approaches. It's not rocket science. (Michael)
	Self-motivated, versatile	I think you need to be self-motivated, because in a lot of cases, you're not going to get much support. (Allan)
	Enthusiastic, passionate	I've brought a fair bit of energy to the evaluation of this project, and I think that is seeping through to my colleagues now. (Allan)
	Curious, open to change and challenges, asks questions	I think because I ask lots of questions that encourages other people to also do so. (Karen)
	Willing to take risks and make mistakes	We want to improve things... You know what went wrong last time. You don't want to do that again. So, you learn from that mistake. You try something else and move on. (Serena)
	Visionary	I need to look intently at what is happening on the ground, but I also always use that other reflective lens and ask the question – does this work link to what we are doing in a broader organisational context? Are we really responding to real and identified community needs at a local level? (Jenny)
	Drives the process	I'm keeping evaluation on the agenda. I'm making sure that the managers don't forget evaluation. (Wendy)

Allan demonstrated a curious disposition, a habit of asking provocative questions, and a willingness to demonstrate what was possible in his work as a project officer in an organisation that did not have a strong culture of evaluation:

> *The context was challenging, focussing on Aboriginal and Torres Strait Islander cross-cultural communication projects. Allan and his co-workers thought that the work they were trying to do was hard to measure from an evaluation perspective. This, coupled with an assumption that the projects they were working on were inherently good, meant evaluation was not prioritised. Allan found appropriate times to ask questions that prompted discussions about the evidence base and ways that they could demonstrate the value of their programs. "Dialogue is such a big focus of everything that we do. And I don't know if I've got a skill with dialogue, but I think I like de-briefing with my colleagues and talking stuff through. I think that kind of often happens informally. I notice it happening at lunchtime and informally when we're sitting down."*
>
> *Allan actively encouraged his peers to see the challenges in their work as learning opportunities. This was his response when his colleague was struggling with a new project, "No. That's gold, man. Like this is a pilot. This is what we want. This is how we're going to learn." Asking critical questions and independently developing engaging ways of packaging monitoring data to prompt discussion within the team was welcomed by management. Allan provided this example:*
>
> > *I don't think the [project] manager saw it being super important necessarily at the start. But then as he's seen sort of the narratives come out and these documents we've put together showing case studies of different houses which capture – like they're representative of what's been going on in the project as a whole – I think he's been like, "This is gold. This is really great." So, he wasn't telling me not to do it, but*

he also wasn't promoting it from the start. So, I had to kind of start to get it going. Drive it.

These self-reported repeatedly emphasised examples provide some key insights into the attributes of the individuals nominated as people who championed evaluation. The examples assist with understanding how they effectively worked with their co-workers in regards to evaluation.

Summary

Participants interviewed were passionate about contributing to society through the work of their organisations. They saw evaluation as a tool that could help them find out if they were effective, find out how they could improve, and find ways of communicating to others, including funders. To do this in an organisation, they had to convince their colleagues, who were often reluctant, busy, or who had previous negative experiences, so they could also benefit from incorporating evaluation. Participants tailored their communication to their audience to persuade their co-workers to become involved. They harnessed their knowledge brokering skills and worked with others using a team approach to provide evaluative information to the right people, in the right way, at the right time to generate further momentum, to demonstrate their work, and to highlight the improvements required. Participants focused their efforts to support evaluation to be embedded within the organisational system by promoting evaluative thinking and providing encouragement.

Although this research found strong evidence of strategies that relied upon interpersonal connections and could be aligned with the cooperative teamwork elements of positive interdependence, promotive interaction, and social skills, there were few strategies that aligned with individual accountability and group processing, such as holding co-workers accountable and taking time to reflect on group functioning. In contrast, this research did find strategies related to the individual accountability and group processing elements of cooperative teamwork in the case studies. The subsequent Chapter 5 will examine these strategies from the case studies and then

Chapter 6 will draw the examples from the two chapters together with the theory of social interdependence to understand the implications of the findings.

CHAPTER 5 – FINDINGS FROM CASE STUDIES

The previous chapter examined the findings from semi-structured interviews with 17 participants. The purpose of this chapter is to explore the experiences of four of the 17 interview participants by examining different perspectives on their role. The multiple case study approach assists with answering the research questions by describing the participants' context, organisational processes, and social environments in detail. The findings in this chapter do not deviate significantly from Chapter 4 as many key claims are consistent. However, the findings in this chapter are different in two respects. First, the chapter includes the perspectives of evaluators and colleagues, and it examines why the case study participants were reportedly able to increase the sustainability of their initiatives compared with many of the other participants. Second, this chapter provides an opportunity to understand the way participants work in greater depth.

This chapter is organised by four cases: Fred, Sally, Michael, and Kelvin. Each begins by introducing the participant and then provides background on their organisation and evaluation initiative. The chapter then provides a recap of the data analysis strategy presented in Chapter 3 based on Stake's (2006) multiple case study approach, including terminology and worksheets. It explains the reasoning and process for developing four assertions based on the cross-case analysis. The chapter then discusses each assertion in detail. While it includes an indication of where there was alignment with the elements of cooperative teamwork, Chapter 6 will discuss these connections in more depth.

Selection of the cases

As detailed in Chapter 3, I offered ten participants the opportunity to participate in a case study, and six declined. Only one project-level participant gave consent to undertake the case study. Although the other project-level participants were enthusiastic and willing, they were not able to be involved because of a lack of capacity, time, and support from managers. Three of the four final case study participants chose to be involved because they were at a senior level and personally had the

delegations to approve involvement; the three were in positions ranging from manager through chief executive officer. The remainder of this segment provides a brief introduction to the four case study participants.

Fred was a white Australian male in a senior-level position of an organisation with approximately 30 employees. The challenge for Fred was that all the people he was working with were geographically located across the country in this national organisation that, even pre-pandemic, predominantly had to rely upon emails, telephone, and videoconferencing to communicate in person. Sally was a white female from the United Kingdom, and the main distinguishing feature of her case was that she was a project officer in a large national organisation that had over 100 employees. Michael was a white Australian male in a senior-level position in a small organisation of only 15 employees. Although his team was all located in one state jurisdiction, some of the team were based in urban settings and some in remote communities, which again created challenging circumstances for effective communication. Kelvin was a black male originally from a nation in Western Africa, and he held the most senior role of the case study participants with the title of chief executive officer. The organisation he worked for was small with 25 employees, and this was the only case study organisation where all the employees were centrally located in the one building.

All organisations had been in existence for over 10 years and had different purposes and geographic locations. The level of cultural and linguistic diversity of staff, clients, and volunteers as well as diversity of age, gender, education levels, learning and engagement styles, and aptitude for administration was high across the organisations. Table 11 summarises details about each case study.

Table 11

Information About Each Case Study

Feature	Case A – Fred	Case B – Sally	Case C – Michael	Case D – Kelvin
Gender	Male	Female	Male	Male
Country of origin	White Australian	White United Kingdom	White Australian	Black Western Africa
Years in sector	>20	>15	>20	>20
Level in organisation	Senior: manager	Project: project officer	Senior: manager	Senior: chief executive officer
Level of evaluation initiative	Organisation	Project	Project and organisation	Organisation
Size	Small (fewer than 50 employees)	Large (over 100 employees)	Small	Small
Location	National	Inner-city program as part of national	Jurisdictional	Capital city
Purpose of the organisation	Community development	Family support to access safe and affordable housing	Family support to connect families with schools	Family support to connect refugee families to Australian society
Willingness	High	High	High	High
Time available	Minimal	Minimal	Minimal	Minimal
Site visit	Yes (Head office)	Yes (Head office)	Yes	Yes
Internal evaluator	No	Yes	No	No
No. of colleagues / board members interviewed	3	4	3	6
No. of evaluators / consultants interviewed	2	2	2	1
Total interviews	5	6	5	7

Case Study A – Fred

Fred was a middle-aged man who had an open friendly disposition. He had a relatively deep voice and spoke using lyrical tones. His tempered way of speaking in combination with his tall stature meant he did not have to work too hard to get people to listen to him; his co-workers were drawn towards him to hear what he had to say. Fred's career spanned over 20 years in the community development, arts, and disability non-profit sector in a wide variety of different roles. He

had obtained graduate level qualifications in the arts at university, but many of the career choices he made were related to his underlying motivation to contribute to improving the lives of other people.

Fred's introduction to evaluation happened in his early career roles in the disability sector. These roles always included a monitoring component, and he had to write grants and proposals and implement projects that included monitoring and evaluation. Fred understood evaluation to mean a way of understanding and assessing the impact of the work. For him it was a means to prove the organisation's worth and communicate the value to others. Raising his voice, Fred became animated when he fired off these questions in the interview:

> I mean the whole process is about evaluatively thinking... What am I really doing? Am I really achieving anything? Am I really getting anywhere? What's happened with this group compared to when I first started? So that way of thinking is the key.

The organisation

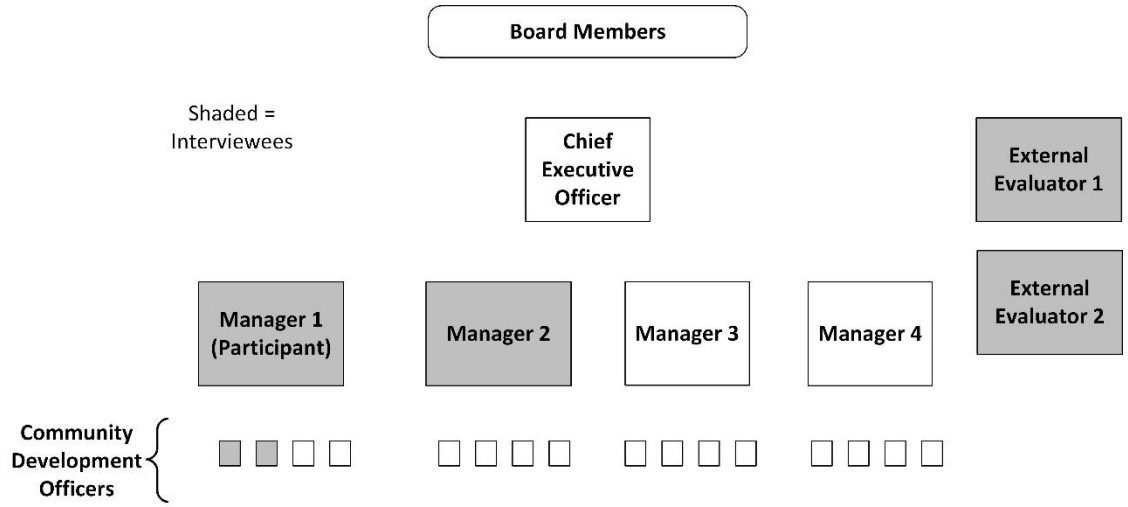
The head office building where Fred worked was hard to find because it did not have a shop front or any fancy signage. Walking up a set of stairs to reach the office space revealed an open plan environment that was run down and in need of repair, but had a cosy, comfortable, and welcoming feeling. Fred had one of the three offices to the side of the open plan area with a window. He had been working with this organisation for over five years in a senior management position.

The organisation developed local projects with communities across Australia. Community development officers employed by the organisation, when requested by community representatives, worked collaboratively to design and develop programs. They then made connections between the community and skilled volunteers who could offer additional support to assist the community achieve their ambitions. The range of projects varied from health, well-being, economic participation, through to promoting equity and inclusion, but all with goal of self-determination.

Figure 8 provides a representation of the organisational chart and indicates that Fred reported directly to the chief executive officer.

Figure 8

Representation of Organisational Chart – Fred's Organisation



Fred had direct supervision responsibility for four staff, but was implementing projects that impacted all the staff who were working at the project level. Over one-third of the 30 staff members identified as Aboriginal and/or Torres Strait Islander Australians, and they worked from different capital and regional cities around Australia. Some staff even worked from home because they had so few staff in their jurisdiction and it was not worth the operational costs of opening an office. Managers scheduled some in-person meetings throughout the year, but communication among co-workers typically occurred over the telephone and internet. In these pre-pandemic times this organisation was already struggling with keeping people connected when they were not working in the same office, due to inadequate band-width to maintain meetings where everyone could use their video, balancing work and family dynamics in home offices, and dealing with the challenges of scheduling meetings across four time zones on a more than daily basis.

Since 2011, the organisation had been working towards not being dependent on a single source of funding. They wanted to fully implement their community development goals and operate

a financially secure and sustainable organisation over the long term. They were aiming towards securing funding from a variety of sources, including the different levels of government, the business sector, and individual funders. Fred recognised that to undertake community development work that advocated for self-determination, independence was critical. He believed that to improve, to attract funding, and to survive, the organisation needed evaluation to build their evidence base.

By 2012, the board and members of the executive recognised that they needed to demonstrate the impact their programs were having in the communities in which they were working. The sustainability of the organisation relied upon its ability to communicate what they were doing and how they were making a difference. Fred was involved with these discussions and would eventually take the lead on developing an evaluation capacity building initiative that aimed to assist the organisation to demonstrate effectiveness.

The evaluation initiative

Prior to undertaking an evaluation capacity building initiative, staff and the board did not prioritise community feedback, the community's vision was not well articulated, and the organisation could not determine the degree to which they were achieving the vision. The context was also challenging, as the community development ambitions were long term and hard to measure. Regarding communication of project outcomes, the community development officers returned reports to the community that included photos and stories. Funders similarly received project reports with details about the location, program aims, number of days, and number of people involved. Some funder reports also included information about the levels of satisfaction from the perspective of participants, volunteers, and stakeholders. The process community development officers used for engaging with the community focused on short-term activities, and the documentation did not include space to record anything about the longer-term development goals or aspirations. Therefore, when it came time to make an assessment about progress, the organisation could only report against activity level indicators. The board and senior management

found this frustrating because there was no evidence to say how the organisation was contributing to change above the level of number of people trained or numbers of successful grant submissions.

Fred frequently felt as if he was stuck in the middle of opposing interests. He felt the frustration of the board and other senior managers, but he also met with resistance from co-workers who were working with communities. Some of the staff did not want to change the way they were doing things. They thought that recording the activities was sufficient to demonstrate the work and was enough of an administrative burden without additional paperwork. Fred gave the impression of walking a tight rope when he talked about the challenges of managing the interests of staff. He had to find the right balance of capacity building approaches to try and make it appropriate for the largest number of people. He had to find appropriate external expertise to assist with the technical aspects, access resources to fill gaps in organisational capacity, communicate an overarching vision in multiple formats, and build the capacity of staff from culturally and linguistically diverse backgrounds who had different levels of education and professional experience.

In 2014, Fred initiated an intentional evaluation capacity building approach. Some of the documented principles included being inclusive, flexible, taking an empowering approach, working in partnership, and communicating appropriately. Thereby, Fred attempted (to the extent possible) to support all staff, stakeholders, and participants along the route to collectively build the systems for evaluation. One of his first steps was to establish a working group made up of individuals who had shown the least resistance and who could be instrumental in persuading their co-workers to get involved during the implementation phase. The working group listed the stakeholders to be engaged, set realistic timelines, intentionally developed communication processes that would be responsive and cyclical, genuinely encouraged participation, facilitated training, and monitored other changes that were occurring simultaneously.

At a local networking event around evaluation, Fred had introduced himself to an external evaluator connected with a university. The esteemed evaluator with over 20 years of experience

across different sectors was the guest speaker at the event. The audience responded favourably to her presentation, and while others may have been intimidated by this formidable individual, Fred used his initiative and struck up a conversation over the platter of refreshments. He had explained their dilemma and communicated their need for assistance in such a convincing way that the external evaluator had returned to the university and negotiated an agreement enabling her to second her expertise to Fred's organisation pro bono. The evaluator willingly gave her time as she felt this was an opportunity for her to work with Fred and develop evaluation capacity in a non-profit organisation. Fred and the evaluator set up a *buddy* system to enable individuals with an interest in evaluation to mentor and support other co-workers. Fred also regularly shared communication briefs across all the available platforms to ensure that written and verbal updates were routinely available and accessible.

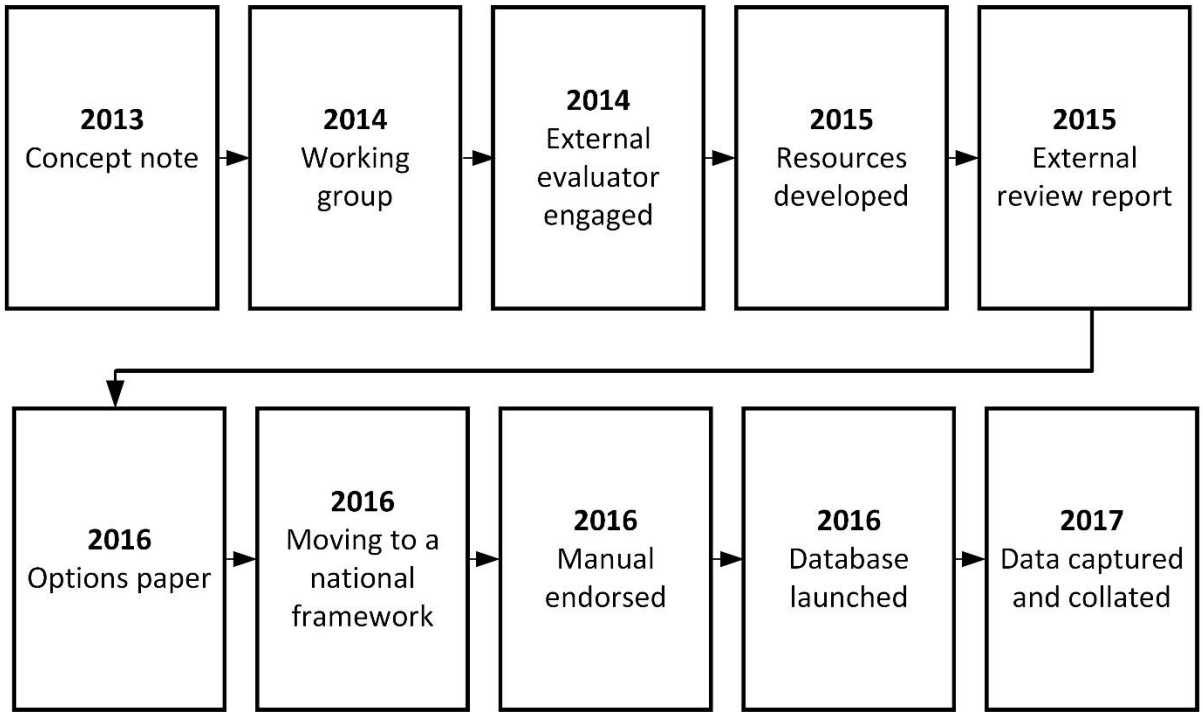
In 2016, the board endorsed the organisation's framework for community development. The manual had reflection points and guidelines embedded to prompt staff to consider underlying assumptions and think about potential solutions. By 2017, Fred worked with a database developer to capture qualitative and quantitative information in a database that was accessible to all staff. Aligned to the community development framework and manual, the database enabled staff to document each step in the project management cycle. If a community representative requested a volunteer to help write a grant, the community development officer could use the prompts from the framework to get more information about the longer-term aspirations and talk about what success would look like for the community. The officer could record this in the system, document how the activity aligned with the organisational goals, and respond to the system flags that would arise prompting for more information. The officer had a place to record if the grant was successful and what resulted from procurement of the funds, including changes in the community.

The database enabled the organisation to aggregate their community development activities across the regions and demonstrate their overall outcomes. Staff had received training in

participatory monitoring techniques that were appropriate for their projects and communities. Some of these monitoring tools included asking reflective, strengths-based questions at regular points in time, recording stories, taking snapshots using multi-media resources, taking walks together around communities to find geographical markers to prompt discussion, and adapting pre-existing participatory monitoring tools. The database meant that staff could then align the results from the monitoring tools with the community development framework to illustrate results beyond the local level. This began to fulfil the need for information at the organisational outcome level that the executive and board had originally identified as a need. Figure 9 summarises the timeline of events, beginning with Fred developing an initial concept note through to the launch of the database where the organisation could capture and collect information.

Figure 9

Timeline of Key Steps in Fred's Evaluation Capacity Building Initiative



Case Study B – Sally

Sally from the United Kingdom had a bright smile and an energetic, dynamic nature. She was easy to talk to and had a captivating accent that others enjoyed hearing. Although petite, she radiated strength and determination. She had postgraduate qualifications in human rights law and justice and experience working in small community based non-profit organisations before she travelled to Australia. Sally spoke passionately about her work, and it was evident that she had enjoyed her more than 15 years in the non-profit sector and the three years in this organisation at the time of the interview.

Although Sally talked confidently about her previous work experience, her tone changed when she talked about evaluation. She had minimal experience with evaluation prior to taking on the role. She questioned why she had been nominated to be part of this research when she did not consider herself to have any specific technical evaluation skills. However, it was clear that Sally was passionate about demonstrating how her work made a difference in the lives of her clients. Sally's speed of speaking increased as she ardently argued for the role of evaluation:

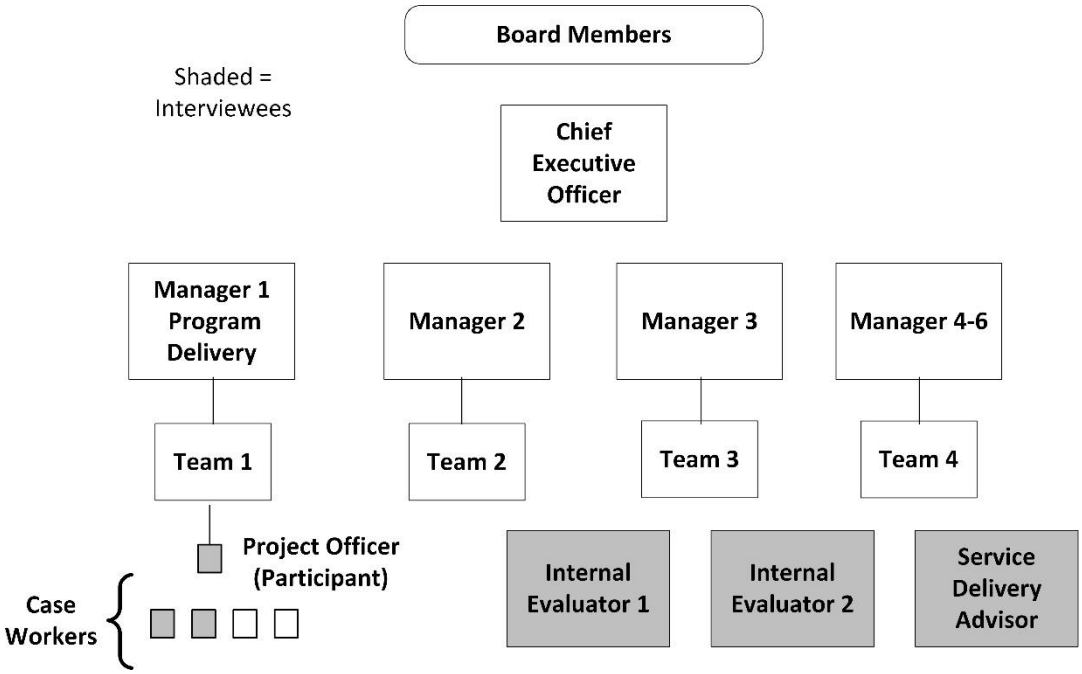
> It has been a huge advantage that we have our research and evaluation team, and not all organisations have that privilege. I'm just really grateful for the fact that we had that involvement and we continue to have that involvement. As well as that, the passion and the motivation just for changing lives. That is the main thing that you need to think of when you really are making an impact, and we need to prove it… At the end of the day if we can't prove our worth, we are not going to get funded, then we can't continue to change lives. I would definitely advocate for evaluation, and I think it could and should be included in more work programs.

Sally's project-level position reported to an area manager, had minimal formal authority in the organisation, and had no direct reports, but provided supervision to a team of four people. She was not at all apprehensive about the level of diversity among her team as she calmly acknowledged

there were experienced and in-experienced practitioners with varying levels of qualifications from certificate to undergraduate level, Aboriginal and non-Aboriginal Australians, and males and females. Sally recognised that it was entirely routine for this type of organisation to have a target audience from a variety of different cultural and linguistically diverse communities and socioeconomic backgrounds, and she welcomed the interesting dynamics. The organisational chart represented in Figure 10 highlights that the organisation had an internal evaluation section with two evaluators located separately from the service design and implementation unit in which Sally was based.

Figure 10

Representation of Organisational Chart – Sally's Organisation



The organisation

Sally's office was on the 14th floor of one of the tallest buildings on the busiest street in one of Australia's largest capital cities. Employees needed a swipe card to enter the elevator. To have a meeting or talk on the phone, away from the rows and rows of open plan desks, Sally had to book a

tiny windowless room that could fit a maximum of four people. The large national non-profit organisation was a community service organisation that helped people to regain their independence. The organisation aspired to uphold core values that included compassion, integrity, and respect. The overarching goal was to reduce homelessness, assist families, and provide youth, mental health, disability, and employment services.

Sally spoke of the intense competition between organisations for finite financial and human resources in an extremely challenging environment. The organisation was not easily able to measure change, but the demand for evidence of impact was increasing. Sally and the internal evaluators interviewed acknowledged that the challenges for an internal evaluation unit in this organisation were related to its large size and the disparate geography, as staff worked in different states. Multiple internal audiences for evaluation information (policy and advocacy, impact and analytics, and service design and development departments) and multiple external audiences (government, funders, media outlets, corporate partners, and website audiences) were requesting evaluative information.

The evaluation initiative

After she read the literature review and grant proposal, Sally was enthusiastic about her part in the implementation and evaluation of an intervention based on the latest social psychological evidence that aimed to reduce the risk of homelessness due to eviction. Implemented during 2015 and 2016, the program was designed to reduce the underlying factors that may contribute to situations of hoarding and unhealthy living conditions. The 12-month pilot project involved seven staff members and 29 participants over three sites and incorporated case management, cognitive rehabilitation, cognitive behavioural therapy, and a peer support group. Intended outcomes that the program was working towards included increasing well-being and independence, and improving living conditions and cognitive function.

The organisation's manager for program delivery had included an evaluation component in the initial grant submission, and it was Sally's responsibility to manage the project and oversee the implementation of the evaluation. Sally supported the internal evaluators to develop the monitoring and evaluation framework and worked with the program team to develop five monitoring tools. They collaboratively developed criteria that were relevant, realistic, and tailored to the unique circumstances of co-workers and clients.

Sally played a pivotal role in establishing the steering committee that included managers, internal evaluators, and external expertise. She actively sought guidance from technical experts and made connections with external organisations. Sally was the person from the organisation who also invited stakeholders from external organisations to contribute on the steering committee, as well as seeking their input informally. Sally was the connection between multiple stakeholders who needed to work together to achieve the successful completion of the evaluated pilot project.

During program implementation, Sally effectively found ways of convincing her co-workers, in addition to their role, to undertake evaluation tasks with the hard-to-reach clients under challenging circumstances. For example, she pretended to be a client and allowed her co-workers to trial some of the evaluation tools. This meant in a safe environment they had an opportunity to see how the interaction of exchanging feedback could result in a beneficial outcome for the client. The program team received value from the real-time findings that enabled them to make immediate improvements.

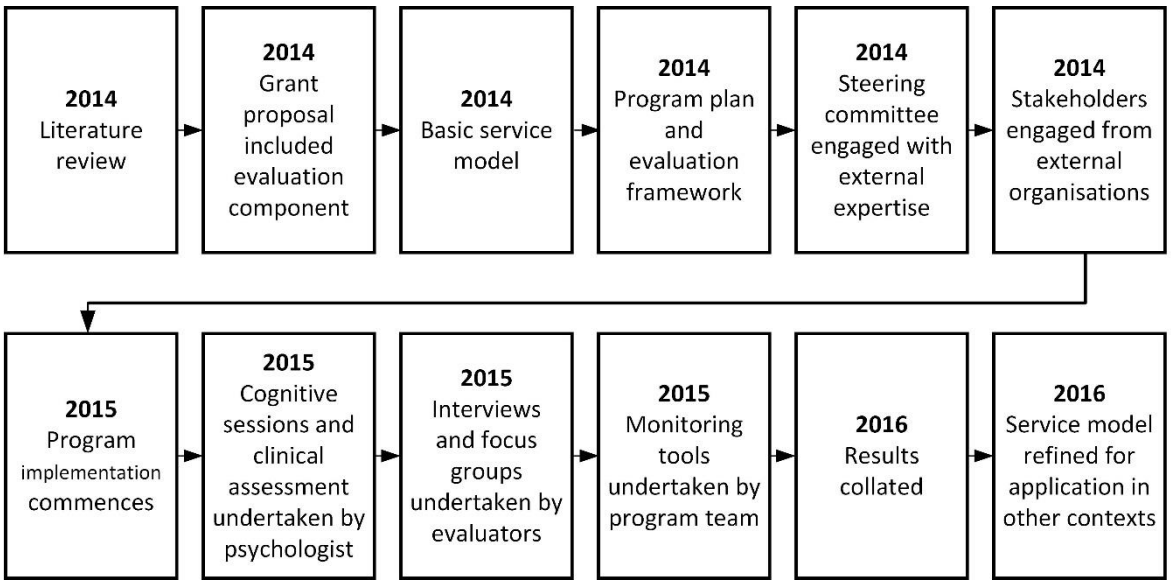
The internal evaluators said that Sally's assistance to coordinate and facilitate the interviews and focus groups with clients and key stakeholders was invaluable. She made introductions, explained the process in a way that the clients could understand, and established physical environments and spaces where people felt comfortable to participate. Sally also supported the team to collect the clinical assessment data required by the psychological team. As documented in the evaluation framework, the internal evaluators combined these data sources, and then Sally and

her team were involved with analysis and sense making of the findings. The organisation's service design advisor also liaised with Sally to refine the service model, based on the evaluation findings, to ensure that the model was ready for application in other contexts. Sally had a high level of enthusiasm, problem solving ability, communication skills, and positivity to see this project and evaluation to completion.

Throughout the pilot project the evaluation unit had valued the contribution of the program team, and subsequently the program manager and evaluators incorporated this collaborative approach into the design of other programs. At the conclusion of the pilot project, the executive management team allowed the evaluators to publish the findings externally and share with a wide range of internal and external stakeholders. Not only was the evaluation incorporated into the organisation's strategic plan, but by sharing the findings with multiple audiences across different platforms, the program and the evaluation likely made a valuable contribution to the broader non-profit sector. Figure 11 provides an overview of the timeline that involved Sally and the team at almost every stage.

Figure 11

Timeline of Sally's Evaluation Initiative



Case Study C – Michael

Michael had a calm demeanor and was soft spoken. For a middle-aged man of medium build he was thin and had a grey short stubble beard that framed his wide smile. Michael seemed to enjoy talking and welcomed the opportunity to share his experiences with evaluation and the organisation. He considered his words carefully and was not rushed or hurried. He was deferential about the research and almost reverent in the way he answered the questions. Michael seemed a little ill at ease that he did not have formal qualifications at the tertiary level, but was extremely proud of the practical work he had undertaken supporting families to prevent young people from becoming at risk of social problems. He had worked in the organisation for over five years and in the sector with culturally and linguistically diverse people for over 20 years. Michael had always valued reflecting on his work to see if it was making a difference; he adamantly stated, "I'm not a big believer in doing things time and time again that don't necessarily work!"

The organisation

Michael managed a small non-profit organisation, and his office was located in a building at the back of a school next to a maintenance shed. The building was one story and might have originally been a small house. It had a kitchen, a small meeting room, and several smaller rooms converted into offices. The workshop materials in each office were piled up against the walls and stacked on top of overflowing filing cabinets. Large and small pieces of art created by the team, posters with affirmations, and past conference posters lined the walls.

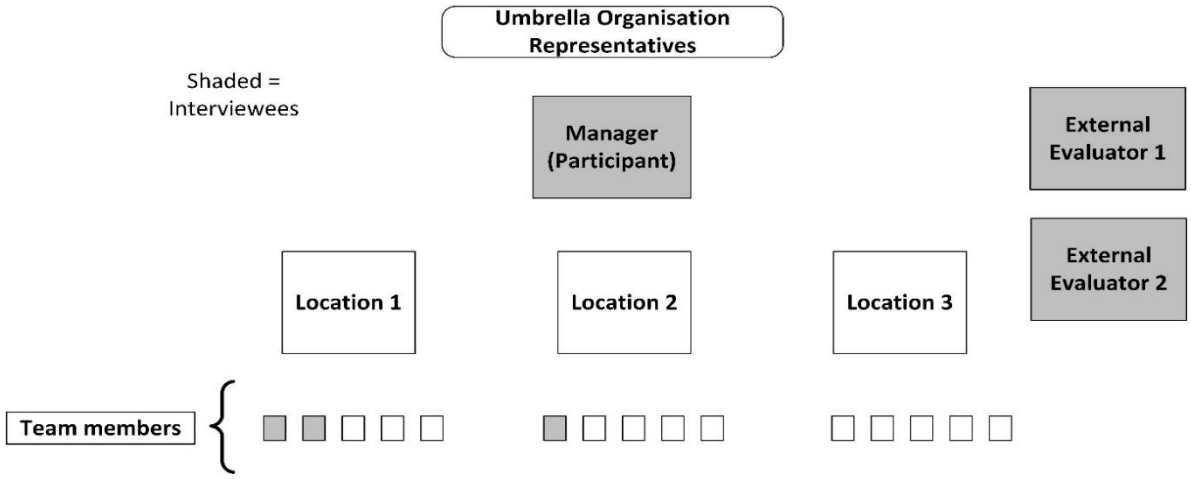
The purpose of the organisation was to adapt an evidence-based program from overseas and implement it in communities across an entire jurisdiction. Staff worked with local schools and Aboriginal communities in urban and remote locations to deliver the program focused on strengthening families, promoting engagement with the local school, and preventing substance abuse. It was an early prevention program that aimed to strengthen families and build protective factors in children. This voluntary program was implemented over two months and involved bring

families together and facilitating entertaining, but planned sessions that were based on research. The program had been developed in the 1980s in the United States of America, had been delivered in Australia since the 1990s, and was considered suitable for the needs of Aboriginal and non-Aboriginal families. As part of the agreement to implement the program, and in exchange for ongoing technical support and mentoring, the organisation was required to complete a series of standardised monitoring and evaluation tools. The organisation committed to returning the data to the program developers on an annual basis.

Michael managed teams based in multiple locations, consisting of Aboriginal, white Australian, and people from other culturally and linguistically diverse backgrounds. The organisation employed three full-time trainers, four part-time trainers, and five staff based in remote communities. Over 75% of the team identified as Aboriginal Australian or were from a culturally and linguistically diverse background, including an employee recently migrated from a southern African nation. Nearly 60% of the team had been employed for more than five years, and there was a sense of strong connection across the team, almost like a family. The main mode of communication among the staff was the telephone. Multiple phone calls on speaker phone were made throughout the day so even though there was a geographical barrier, the team took many opportunities to stay in close contact. The organisational chart is represented in Figure 12.

Figure 12

A Representation of Michael's Organisation



The evaluation initiative

When Michael commenced with this organisation, he felt the pressure to not only make monitoring and evaluation part of routine operations in accordance with the agreement for delivering the rigorously evaluated program, but to also integrate evaluation into the way he managed his team for learning and improvement on a daily basis. Michael's priorities included adapting the international tools to make them culturally appropriate, connecting with expertise to find ways of discovering how the program worked in his context, measuring the seemingly intangible benefits of the program, and communicating their approach and experiences to a national and international audience.

The extant research had demonstrated the effectiveness of this evidence-based program in urban and rural contexts and with families from different socioeconomic, language, and cultural backgrounds. As part of the licensing agreement to implement the program, the fidelity had to be assessed against pre-determined criteria. Michael had to undertake prescribed monitoring and evaluation processes to determine the accuracy with which the program was being replicated to established program standards. However, while the organisation consistently achieved an exemplary rating for fidelity in urban settings, Michael struggled to find a balance between program fidelity and the need to be flexible when tailoring the program for a remote Aboriginal Australian context.

Michael had been continually adapting and refining the original, validated evaluation templates used elsewhere in the world. He was in the difficult position of trying to align multiple worldviews of the participants, funding bodies, evaluators, and the umbrella organisation with the validated templates from the original program. Michael wanted an evidence base to demonstrate effectiveness to donors, ensure the quality of the program was continually improving, and ultimately to sustain the organisation. However, Michael and the team were also personally driven to ensure that the program was being delivered as intended and that it was achieving the desired outcomes. They were constantly searching for tools and methods that could help them understand what

participants perceived as good practice. They searched the web, shared challenges and solutions with other organisations, joined the evaluation society, and worked with academic expertise to continually explore new approaches. Participatory tools that used art, storytelling, and multi-media as mediums were part of the trials to hear the voices of their participants in the evaluation.

Michael understood that for the program to continue, evaluation needed to be embedded in the process. However, he said evaluation was not, and never would be, the main driver. Michael and his team believed in the value of this program and that the program was effective. An Aboriginal colleague expressed his excitement about the program for helping himself, his children, and his community because it paralleled traditional ways of passing on knowledge through the generations. They saw the challenge as a continuous quest to measure and demonstrate what the team already knew existed and believed in.

The team was willing and open for others to join them on this quest and search together for appropriate and meaningful ways of demonstrating success for everyone. Sharing the products of the art-based ways of communicating stories of change and documenting how multi-media had been used in data collection was part of their ongoing development. The organisation maintained long-term working relationships with Aboriginal trainers and research organisations to find intercultural ways of demonstrating program success that were meaningful for multiple audiences. This was above and beyond demonstrating success to funding bodies and represented a commitment to sharing the lessons learned publicly so others across the sector could also benefit.

Case Study D – Kelvin

Kelvin was originally from a western African nation and had a gregarious nature. He was a middle-aged man with a vivacious personality who wore bright clothes. He was expressive and animated. Kelvin had worked in Australia in mental health, children's services, aged care, and disability for over 20 years. His professional background was in child development and family studies, and he had obtained graduate qualifications in the humanities and community services. He

used metaphors to explain his thoughts, and when he could not think of a metaphor, he would draw a diagram. His notepad was filled with pages of scribbles, arrows, and circles that helped him articulate his creative thoughts.

Kelvin saw it as a personal challenge when the board employed him to undertake a change process that included changing the way they evaluated their services. In an animated and excited way Kelvin explained that his interest in evaluation came from a person-centred perspective:

> What I've found myself doing was getting more and more interested in the reforms because that was actually the appetite to look at how things actually changed and put the client as the driver of the changes, rather than the government [funder].

Kelvin had support from the board and senior managers to implement the change process. This was reflected during data collection as, more so in this case than the other cases, there was a high number of quotations from board members about Kelvin's valuable role in implementing the evaluation initiative. Kelvin also reported that the majority of the other senior-level staff also recognised the need to embed evaluation in a routine way if the organisation was to survive.

The organisation

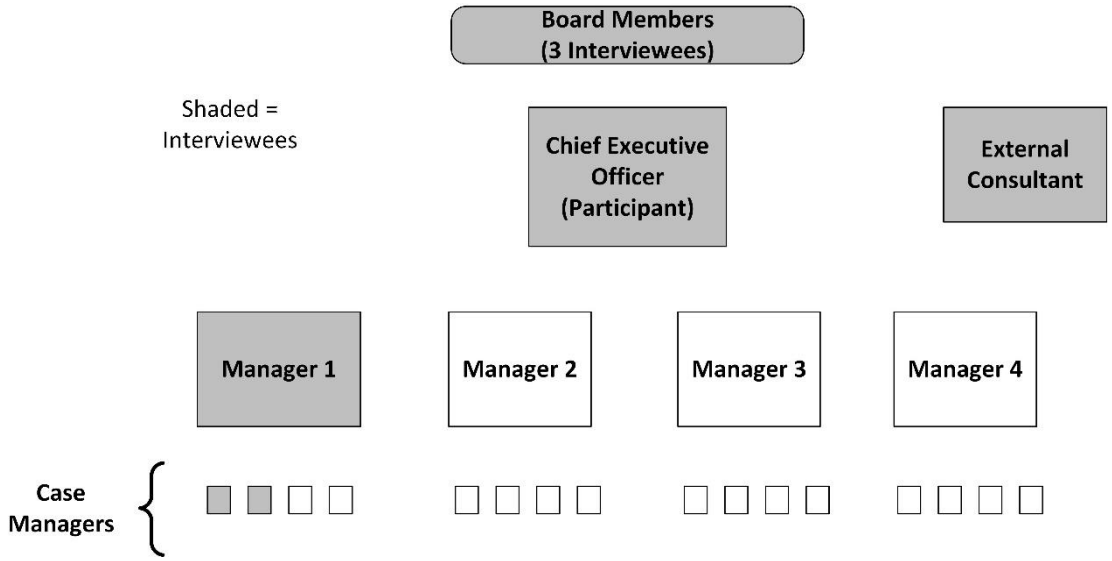
The purpose of Kelvin's organisation was to facilitate the recovery and healing of refugee survivors by supporting resettlement in Australia. The organisation was delivering services to refugees arriving in one Australian capital city, and the entire staff was located together in a single building. The building was located in the centre of the city within easy walking distance of other services and public transport. The building had a historic feel about it as it had been converted from premises that had previously provided accommodation. Kelvin's desk was located in a room that overlooked a courtyard. Four other staff had desks in the same room. A large commercial kitchen, lounge area, activities room, and an office space that contained more open plan desks could all access the courtyard. This outdoor space was the venue for staff to enjoy lunch together, for

participants to gather for activities, for food from the kitchen to be shared, and for social gatherings to occur.

At the time of the interview Kelvin had been working in the organisation for over two years in the position of chief executive officer. In this senior-level position Kelvin managed multiple teams and reported to the board. The organisation provided services to newly arrived refugees, and the staff comprised approximately 30 people from diverse cultural backgrounds, including some African, Asian, and European countries. Kelvin mentioned in passing that almost half of the staff did not have English as a first language. Figure 13 provides a representation of the organisational chart to illustrate where Kelvin was in relation to the managers and the board.

Figure 13

A Representation of Kelvin's Organisation



In 2016, when the board recruited Kelvin to the organisation, a shift in policy direction was the catalyst for an internal review and reform process. Kelvin had a vision for a person-centred approach that placed people from refugee backgrounds at the centre of the organisation, providing services that were respectful and responsive. Services were based around the client's preferences, needs, and values. He believed that a person-centred delivery model was the appropriate approach

to enable the organisation to remain competitive, increase its reputation among stakeholders, and facilitate positive outcomes for refugees. For Kelvin, this way of working included providing access to health and emotional support, meeting information and communication needs, and enabling access to services through care coordination. It also included being respectful, involving the family and other social networks, and providing continuity of care.

The evaluation initiative

Kelvin instigated the change process proactively to begin "future-proofing" the organisation. While this was proactive, external pressures such as government policies, sources of funding, and changed expectations around evaluation were also instigating factors. A board member reflected upon the need to generate evaluative evidence for survival of the organisation:

> Like a lot of not-for-profits, there's always really good people with the best of intentions and their hearts are in the right places, but that doesn't necessarily cut it… The organisation has always prided itself on a good reputation and this anecdotal knowledge that we're doing a good job. The biggest challenge was there wasn't any kind of hard evidence to sell that story.

Kelvin had to develop and build the capacity of the workforce, secure appropriate levels of funding, find ways to learn, assess effectiveness and quality, and communicate achievement using a comprehensive evaluation system.

Over a period of 12 months, Kelvin reoriented the way of working until the person-centred model guided operations and was adopted as the way the organisation conducted business. The board endorsed and supported the changes, but wanted to use evaluation to demonstrate what the organisation was achieving. A board member said, "How do you sell what you've got if you can't demonstrate how you make difference?" Some colleagues also wanted to make evaluation tools to see evidence of impact on clients' lives: "My interest to be in the development sector is to see positive changes in people's lives. I really wanted to know whether my work has impacted in a

positive way." Thereby, along with the change to a person-centred model, Kelvin also embedded the systems required to support, monitor, and measure the outcomes of a person-centred approach.

In collaboration with the funding body, and following a series of negotiations around outcome measures, Kelvin commissioned a new evaluation database and organised training for staff. Kelvin had a vision for making the evaluation tools work for the client and worked to align evaluation with a person-centred approach: "And what is their dream for themselves? That sits in their plan. Then we work through that with them. Then we do an evaluation to be able to capture, 'You were here when we started. Where are you? You should be getting close to that.'" An external consultant articulated how she understood evaluation to be part of the way the organisation did business:

> So client-focused and community-focused. It was the mindset – if you put the client at the centre, then everything wraps around that person to support their needs… looking at the outcomes of a client… by understanding the client's journey… And then it's about monitoring and measuring the progress against that plan.

Beyond the new database and being able to communicate the reported change in the lives of their clients, a board member discussed how evaluation was incorporated into the internal operations because of Kelvin's approach to managing the process overall: "Every step of the way has been that planning, collecting, analysing, evaluating, reviewing, putting in a change, monitoring, reviewing, planning, and that process happens over and over again. That's what is needed - absolutely." Another board member supported the sentiment by stating, "One could argue that the entire process is, in fact, evaluation from an organisational perspective." The external consultant clarified that this way of working had resulted from Kelvin's mindset around evaluation:

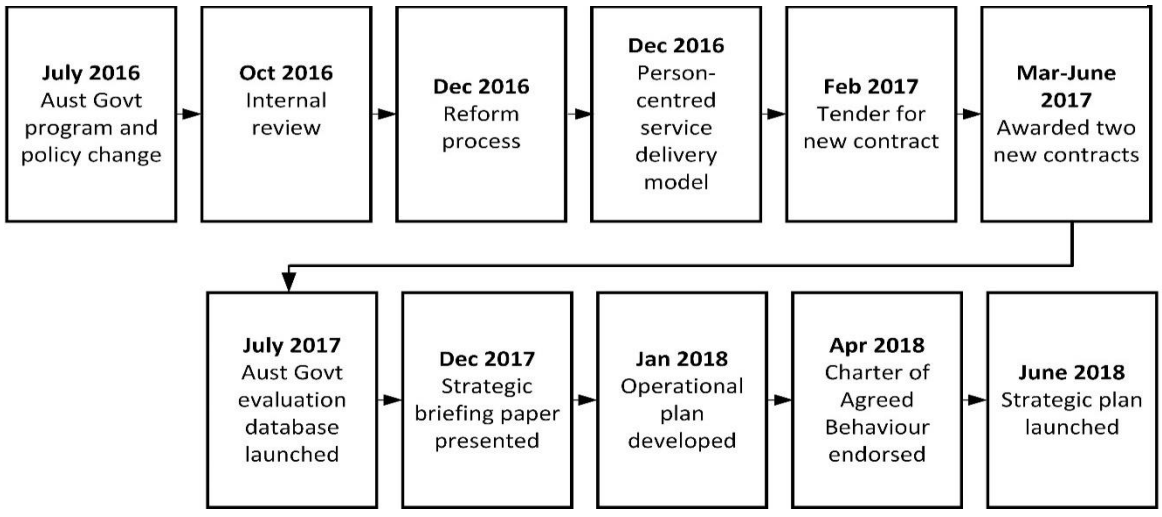
> He's somebody who absolutely believes in it. He sees it as an essential component… We could say attitude and a belief of the importance and value that evaluation brings to individuals, communities, and society at large. So it's just part of that bigger picture. And

because he thinks like that - he's naturally wired… if you really want to create a systemic way of evaluating and measuring impact, then it's got to start at the top.

The change process for staff, however, was not easy. As a person from a culturally and linguistically diverse background himself, Kelvin was aware that individuals acquire information in different ways. Tailoring the process of change to meet the needs of as many people on his team as possible was a priority to encourage engagement. Kelvin attempted to document all changes in writing and distribute these through various channels such as emails, meeting minutes, and a noticeboard. He also sometimes had one-on-one meetings with individuals. Other times he had small group discussions or asked another co-worker who had a personal connection to a specific individual to help explain. On other occasions he let staff members tell him about the changes so that he could get a sense of people's perspectives. He always had his notebook ready to draw diagrams and illustrate his metaphors and analogies to help staff understand the concepts. Kelvin called on assistance from external experts, considered the different personality types involved, used multiple open communication strategies, and found ways for individuals to connect with his vision for what the organisation could become. Continuing to move forward, ensuring there was support from the board, keeping the vision at the forefront, and communicating consistent information using multiple strategies were essential elements in Kelvin's approach. Figure 14 highlights the key events.

Figure 14

Timeline of Key Events in Kelvin's Initiative

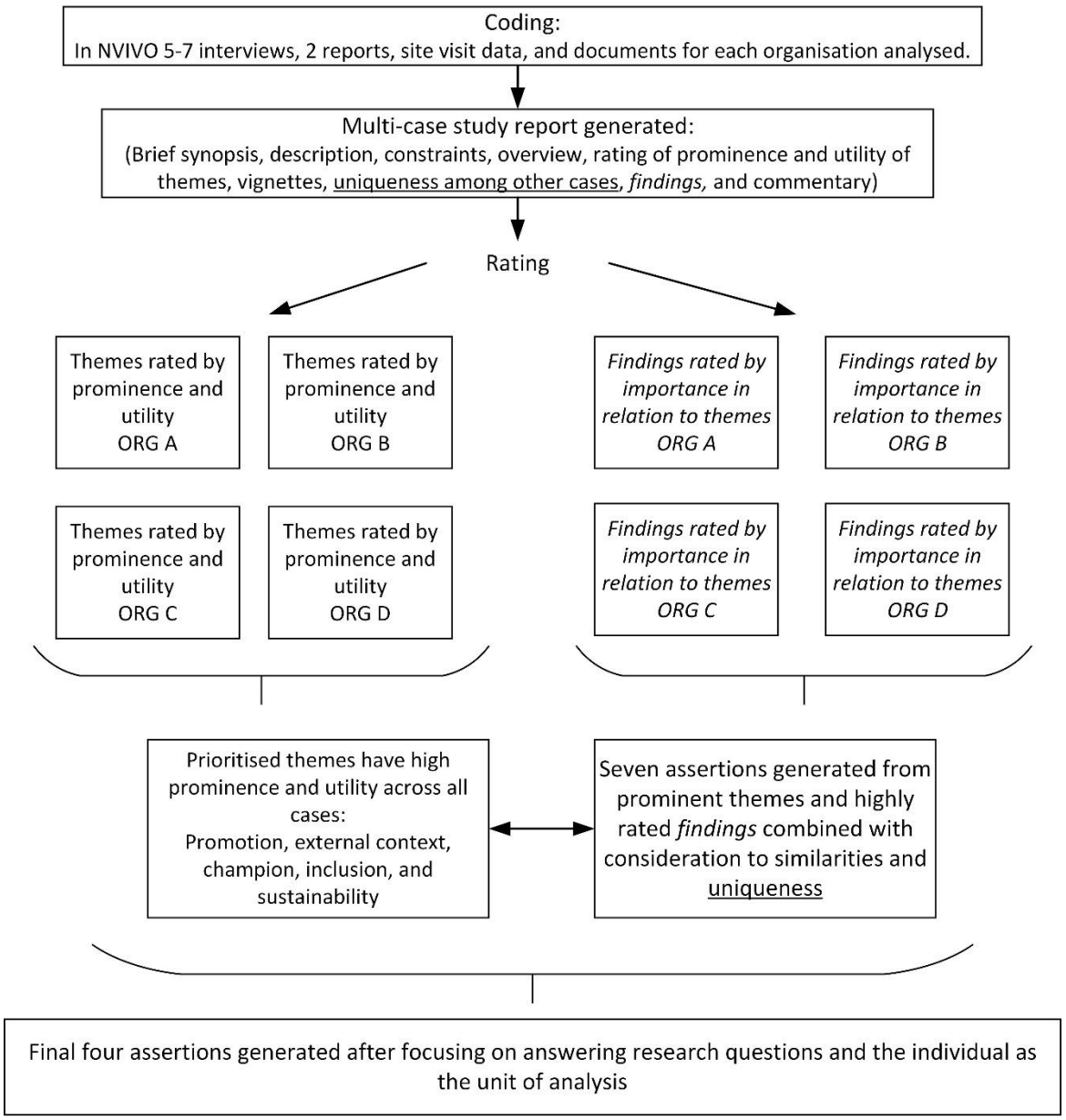


Cross-case analysis

This section of the chapter details the process used to undertake the cross-case analysis and derive the resulting assertions. In accordance with Stake's (2006) multiple case study approach, the analysis closely followed the step-by-step process. I adapted the worksheets into tables and adopted Stake's terminology, such as themes and assertions. To generate four assertions from the analysis, I considered the *prominence*, *utility*, *importance*, and *uniqueness* of themes across each case study. *Prominence* refers to the level of evidence or frequency of mentions and thereby provides an indication of relevance. *Utility* refers to how useful the case was for further developing the themes. *Importance* refers to the level of relevance of a finding for understanding the theme, and *uniqueness* highlights anything unusual about a case. This section expands upon the overview outlined in Chapter 3 to provide additional detail about the decisions made at stage 4 of data analysis. Figure 15 provides a diagrammatic overview of the entire stage 4 cross-case analysis. The following text and excerpts from tables provide additional detail to elucidate in greater depth.

Figure 15

An Overview of the Cross-Case Analysis Process



Initially I analysed the data collected for each case separately to gain an understanding of the participant in their unique circumstances and context. I attempted to answer the question, 'What are the characteristics of this participant working in this particular organisation?' This involved coding the data against the same codes used to analyse the participant interviews. I identified the codes that were most frequently mentioned and had a high level of good quality data; I considered the volume and quality of evidence from the participant, colleagues, evaluators, and the documentation. I labelled the codes that were most frequently mentioned *themes,* and these included *champion*, *change*, *characteristic*, *inclusion*, *external context, leadership*, *motivation, promotion,* and *sustainability*. Table 12 illustrates the themes that had a high level of good quality data coded to the node.

Table 12

Themes That Had a High Level of Good Quality Data Derived from the Codes

Main code	Secondary code	Description	Themes
General	Champion	Any response to the label.	Champion
	Change	Change processes; change management; advocating for change.	Change
Characteristics	Attitudes	Personal traits.	Characteristic
	Behaviours	Any actions, strategies, activities.	
	Skills	Evaluation skills – Any response.	
	Values	Any personal or organisational level.	
	Cognition	Thought processes.	
	Knowledge	Knowledge translation; knowledge management; evidence-based; bridging communication; knowledge gap; broker role; sources of knowledge and expertise.	
	Inclusion	Inclusive behaviours or thoughts about being inclusive.	Inclusion
	External context	Evidence of systems thinking or working strategically in consideration of context external to the organisation; Any reactions or challenges in relation to working with academics, evaluators, or funders.	External context
	Leadership	Evidence of top down, bottom up, horizontal; Support or lack thereof from leaders.	Leadership
Motivation	Accountability	Evaluation as an external requirement.	Motivation
	Capacity building	Learning that comes from the evaluation.	
	Effectiveness	Assessing or demonstrating effectiveness.	

Main code	Secondary code	Description	Themes
	Improvement	Desire to see organisation develop.	
Promotion	Positive interdependence	Evidence of finding shared value or developing a group goal that links all individuals.	Promotion
	Individual accountability	Evidence of making sure every team member contributes to the evaluation.	
	Social skills	Evidence of communication skills, conflict management, or being inclusive.	
	Group processing	Evidence of reflecting on effectiveness of the team or progress towards goal.	
	Promotive interaction	Evidence of providing encouragement.	
Sustainability	Not sustainable	Evidence of unsustainability.	Sustainability
	Emotion	Uses emotional strategies.	
	System	Examples of building systems, processes, or policies.	
	Evaluation culture	Examples beyond systems, processes, or policies.	

I then wrote a multi-case study report with sections for each case that included a brief synopsis, description, constraints, overview, vignettes, a rating of prominence of themes, a rating of utility of the case for developing the themes, an assessment of uniqueness among other cases, findings, and general commentary (Rogers, 2019). I awarded the themes a high, medium, or low rating of prominence based on the level of evidence. If there was evidence from the evaluators and colleagues supplemented with documentation, it received a high rating. If any of these sources were missing, it received a medium rating, and if only one source was evident, I awarded a low rating. In regards to assessing utility, I awarded a high, medium, and low rating depending upon how useful the case was for further developing the themes. I awarded a high rating if the quotations from the participants, colleagues, evaluators, documentary evidence, and relevant vignettes provided valuable insight into the understanding the theme. For example, if a case contained a vignette that elucidated a theme and I was able to understand the situation from multiple perspectives within the organisation, I awarded a high rating. A medium rating pertained to reasonably informative or helpful data and a low rating applied when the evidence was inadequate for understanding the theme in practice. To identify the most prominent themes that were most useful for analysis across

all the cases I identified the themes that were high for both prominence and utility. Table 13 illustrates how this process resulted in identifying the most prominent themes that were most useful for analysis across all the cases: *promotion, external context, champion, inclusion, and sustainability*.

Table 13

Excerpt: Prioritising the Themes Based on Prominence and Utility

U = *utility*, P = *prominence*, H = *high*, M = *medium*, L = *low*

Theme	Case A		Case B		Case C		Case D		Priority
	U	P	U	P	U	P	U	P	
Champion	H	H	H	H	H	M	H	M	3
Change	H	M	L	M	M	M	H	H	
Characteristics	M	M	H	H	M	M	M	L	
Inclusion	H	H	M	M	H	H	H	H	4
External context	H	H	H	N	H	H	H	H	2
Leadership	M	M	H	H	M	M	M	M	
Motivation	M	M	M	M	L	M	H	H	
Promotion	H	H	H	M	H	H	H	M	1
Sustainability	H	H	M	M	M	H	H	M	5

A separate part of the analysis involved rating the findings from each case study as to their importance in relation to the themes. I considered all the themes that had a high level of good quality data derived from the original codes. The findings were short sentences that succinctly summarised the key messages from the individual case study reports. To rate the findings, I answered the question, 'How important is this finding (derived from the case) for understanding participants (regarding the theme)?' I applied a high rating if the finding clearly provided an example that could assist with articulating how the theme was operationalised in practice. If the finding made somewhat of a contribution to illustrating the participants behaviour in relation to the theme, I applied a medium rating. A low rating was indicative of no connection between the finding and the theme. Table 14 illustrates application of the ratings to a finding from Case A as an example.

Table 14

Excerpt: Rating a Finding from Case A

Case A Finding 1	Theme	Rating
The participant tailored the information about the evaluation initiative to the needs of the individuals involved.	Champion	L
	Change	H
	Characteristic	H
	Inclusion	H
	External context	L
	Leadership	L
	Motivation	L
	Promotion	H
	Sustainability	L

In the next step I identified the highly rated findings that corresponded to the prioritised themes. Out of a total of 18, 10 findings remained. From these 10 findings I developed seven tentative assertions by analysing the relevant findings in relation to the themes and the degree to which there was similarity across all the cases or there was a unique element compared with other cases. Table 15 provides an excerpt of the process and includes an example of a vignette to illustrate how I generated the tentative assertions.

Table 15

Excerpt: Developing Tentative Multi-Case Assertions

Sample of relevant findings	Related theme	Similarity or uniqueness	Vignette example	Tentative assertion
Participant clearly articulated reasons for not wanting to be called a *champion.*	Champion	A, B, C, D: Similar	B - Differences between *subject matter expert* and champion.	Evaluators and colleagues indicated that *evaluation champion* was not an appropriate descriptor.
Participant from a project-level position was able to influence peers, people in leadership positions, technical support people, and allies in external organisations.	Leadership Promotion	B – Unique	B - Importance of rapport and individualised consideration when working with clients - same as for the team.	It is possible from a project-level position for participants to demonstrate leadership qualities.
The participant promoted evaluation by sharing analogies and creating visual aids to show individuals how their roles and responsibilities in the organisation connected to the vision.	Promotion Change Inclusion Motivation Leadership	A, B, C, D: Similar	A - Change process around evaluation helped staff learn about culture and information enables deeper understanding of community perspective.	Participants' predominant strategy to promote evaluation was to develop mutually beneficial goals that incorporated evaluation.
Participant tailored information about the change and the evaluation initiative to the needs of the individuals involved.	Change	A, C, D: Similar B: Unique	A - Staged process evolves around supporting a vision of embedding evaluation.	Managing change is an integral component of the role of participants.
Participant had a vision for how the system could be improved and used any opportunity and all available means to influence change.	External context	A, C: Long term and B: Short term	A - Organisation articulates desire to influence social policy.	Participants worked towards changing the system in which the organisations were operating.
Encouraging involvement, tailoring to the individual, embedding responsibilities, showing how evaluation links to aspirations, and reflecting upon the way of working.	Promotion Inclusion	A, B, C, D: Similar	C – Participants and staff connecting with the evaluator individually so that they understood expectations.	Participants used multi-pronged individualised strategies to encourage and support evaluation.
Participant's strategies for embedding evaluation and reflective practice have been incorporated into routine operations and have been shown to be sustainable.	External context Sustainability	A, B, C, D: Similar	D - Immediate focus on survival but implementing person-centred approach and processes to ensure sustainability.	Participants intentionally chose their strategies to increase the likelihood of the change being sustainable.

The last step in stage 4 involved excluding assertions that related to *external context*, *leadership*, and *change* themes. The research questions focused on understanding characteristics about the individual; the questions focused on personal motivations and ways that the individual was able to promote and sustain evaluation initiatives. The data connected to these themes (systems thinking, change management, and organisational and external level issues) were beyond the scope of this research that was intent on keeping the individual as the unit of analysis. Although there was important information connected with these assertions and themes, the process assisted in clarifying the sources of data that could answer the research questions.

The final assertions were based on the themes that were most useful for answering the questions across all the cases: *promotion, champion, inclusion, and sustainability*. The multi-case assertions resulting from this analysis included:

1) Evaluators and colleagues indicated that *evaluation champion* was not an appropriate descriptor for the participants
2) Participants' predominant strategy to promote evaluation was to develop mutually beneficial goals that incorporated evaluation
3) Participants used multi-pronged individualised strategies to encourage and support evaluation
4) Participants intentionally chose their strategies to increase the likelihood of the change being sustainable

Assertion one relates to the participants', evaluators', and colleagues' response to the definition. Assertions two, three, and four relate to their strategies around how they worked with colleagues. Assertion four has a focus on the research question about the ways and the extent to which participants supported evaluation to be embedded within the organisational system. The next section of the chapter looks at each assertion in detail, shares examples from each case, and

highlights alignment with the elements of cooperative teamwork from social interdependence theory.

Assertion 1: Evaluators and colleagues indicated that *evaluation champion* was not an appropriate descriptor for the participants

In response to the proposed definition, Chapter 4 showed that participants were strongly resistant to the label of *evaluation champion.* This assertion makes the claim that their evaluators and colleagues also thought that the label of *evaluation champion* was inappropriate, unhelpful, and did not accurately represent what participants were doing in practice. Participants, evaluators, and colleagues did not think the label was conducive for supporting cooperative teamwork. There was also strong agreement that indicated that the person labelled as an *evaluation champion* would be someone who had a level of technical evaluation expertise to share. None of the evaluators or colleagues suggested that participants had technical evaluation expertise. Making the connection with social interdependence theory, this assertion gives examples that highlight the tension that the label of *champion* brings to a situation where participants were trying to establish a cooperative workplace as opposed to working in a competitive environment. This section will focus on examining the reasons the evaluators and colleagues gave when articulating their position, but will leave a discussion of the findings in relation to social interdependence theory until Chapter 6.

One of the reasons evaluators and colleagues gave for rejecting the label was because it was not useful to elevate the status of one individual above others when trying to encourage participation and teamwork. A colleague of Fred's recounted the moment when she put the proposed definition of an evaluation champion in front of him: "They were all things that I obviously agreed with… then chuckled to myself when he said, 'Urgghh, I'm not a champion.'" This negative reaction was similar to that received when on a separate occasion she had attempted to call a few nominated individuals *champions of the system*. Fred's colleague recalled,

> We were going to call them champions actually [laugh], but a couple of them were really uncomfortable with being called champions. “We don't want to be elevated above our peers… we don't want our peers to see us as something better than them.” So, we called it a monitoring and evaluation support committee.

Similarly, an evaluator working with Fred suggested the term *champion* was unhelpful because “it seems to be something which people expect it to be done by some expert rather than everybody ought to be able to monitor and evaluate what they’re involved in.” The label did not align with Fred’s respectful and humble attitude, as noted by this colleague: “And he comes with an attitude of accepting that you are not always right. And you are learning at the same time… it is learning together.” Solid working relationships were key and could be jeopardised by elevating any one individual.

An evaluator working with Sally provided another example. The evaluator did not find that nominating champions was a useful way for her to get support in general and, specifically in relation to Sally, was not appropriate because of her high levels of humility: “I tried to go out specifically to find people who could be champions… They get a bit over-taxed because they are sort of pushed forward… I know that Sally doesn’t like that terminology because she’s very modest.”

Likewise, in regards to Kelvin, the external consultant pointed out that the attribute of humility conflicted with the label of *evaluation champion*. She said, “Champion can feel like, ‘I’m a winner. I’m a winner.’” The consultant, concurring with Kelvin himself, said that *evaluation champion* was not a title that aligned with the approach he was trying to take with his team. Instead of the *champion* label, the external consultant preferred the term *advocate* and thought this was more aligned to what Kelvin was trying to achieve:

> Advocating for evaluation is the positive side in that you know that makes it feel quite tangible… An advocate – there’s some depth of character; “you’re so considerate about this,

passionate." It's about change for good when you're advocating. So, the motivation can be seen to be more sincere, whereas champion might seem to be that you're a winner.

Another reason evaluators and colleagues gave for the label not being appropriate for these participants was because of their lack of technical evaluation expertise. Although the evaluators and colleagues considered Fred to have the skills to access, use, and understand evaluation, they agreed with him that he was not an expert in doing evaluation. His skills were more attuned to gauging the level of interest, encouraging participation, and scanning the environment for opportunities. An evaluator provided this summary of her thoughts about Fred and evaluation:

> He believes in its value. He believes in the capacity of the organisation and the people in it. He is very clear eyed about it, it is not as if he has these rose-coloured spectacles on, but he believes in both the people, the organisation, and in the power of evaluation.

The evaluator working with Sally said they preferred the term *subject matter expert* and used it in a way that implied the person did have technical skills in a particular area. When I asked the evaluator about Sally's evaluation skills, she responded by saying that although Sally did have good skills in understanding the data, the questionnaires, and undertaking data collection, she found Sally's greatest value to be in assisting them to understand how they could appropriately implement the evaluation in that context. Thereby, the evaluator said she would not have called her an expert in evaluation. Similarly, Sally's colleagues did not see Sally as a person who was an expert in evaluation, but someone who was passionate about the program and could see how evaluation could help. A colleague said:

> I wouldn't particularly have said, "Oh, yes. She's definitely a champion of evaluation." But she's definitely a champion of the program, and she was passionate about the work and passionate about helping the clients. So, whatever it took to make that a success, she was passionate about.

In Michael's organisation colleagues said they would not use the term *champion* because colleagues would consider anyone with this label to be a technical expert. The colleague from southern Africa also did not agree with putting the champion label on Michael nor would she use the term under any other circumstance because other co-workers would think the label belonged to a technical expert: "When you're considered a champion, it puts pressure on you… And not everybody thrives with scrutiny." While the evaluator recognised Michael's ability to explain evaluation concepts using metaphors and simple language and have strong positive working relationships with his team, regarding Michael's skills in providing technical evaluation support, he said, "I don't think he's quite got there yet." When I asked another evaluator about Michael's evaluation skills, the response was:

> He's a champion for the organisation, and whatever it takes to promote the organisation, he will pursue it. So, in that sense, when evaluation is required and it's for the benefit of the organisation, then he will pursue it. He's not an evaluator, but in as far as it supports his goals for his programs and his staff and whatever else, then he's a champion.

In summary, this assertion extends the findings from the participant interviews with data from evaluators and colleagues that similarly suggest that *evaluation champion* is not an appropriate label for these participants.

Assertion 2: Participants' predominant strategy to promote evaluation was to develop mutually beneficial goals that incorporated evaluation

In all four cases there was evidence to indicate that the main way participants promoted evaluation was to connect evaluation with co-workers' individual aspirations and the purpose of the organisation. As Chapter 1 outlined, there are many different personal reasons why individuals choose to work in the non-profit sector and these reasons can be strongly aligned to the purpose and values of the organisation. Based on these underlying reasons, these cases provide examples illustrating the ways participants incorporated evaluation into developing mutually beneficial goals;

participants showed co-workers how evaluation could help them achieve what they wanted for the organisation. Participants used strategies to promote evaluation that were based on making connections between what individual co-workers wanted to achieve in terms of the organisational vision and then simultaneously demonstrating how evaluation could help them achieve that goal. The alignment with the positive interdependence element of cooperative teamwork will be discussed further in Chapter 6, but this section will outline how the evidence from evaluators and colleagues concurs with the descriptions from participants in Chapter 4.

Fred's colleagues recognised that he made a connection among evaluation, their role, and the purpose of the organisation as a means of promoting evaluation as a worthwhile use of their time. The change process to increase the focus on evaluation also helped colleagues to learn more about the cultural aspects of the communities they were working with and enabled a deeper understanding of community perspectives, which tapped into what they were wanting. Some responded positively and quickly, but there was resistance among others, which meant that Fred had to find appropriate strategies to convince them of the value of evaluation. A colleague said,

> A lot of the team was like, "Why are we doing this? What is the point of this? Why do we have to go through all this change when what we are doing is so fantastic?" Often it was communicating the big vision… When he dropped in about how we could use it to contribute to social policy by building the evidence base, that excited staff.

The colleague reiterated how she had experienced this connection between evaluation and her purpose for wanting to working for the organisation:

> Fred was always very clear about the fact that it was about capturing the community's voice and engaging with the community and inviting community to participate in this mapping… whenever I go into look at [the database], the story is much clearer and much richer.

Sally was able to influence her team to see the potential for the evaluation by sharing her understanding about the link between evaluation and the potential improvements that they could deliver to the target audience. For example, two colleagues discussed how uncomfortable they felt using the evaluation tools with the clients. However, after consulting with Sally, whose advice reminded them that the reason they were using the tools was to advocate for the clients, this was how one of the colleagues handled the situation:

> I used to just explain to them that… their feedback is the most important tool going forward for us… Anything that they had to say… would be so helpful for us to improve our practice… I made it very much about them, and how valuable their input is, and most people were okay with that.

Another colleague highlighted how evaluation and the evaluation tools had helped her connect with the clients in a more meaningful way: "There was something actually really lovely about that – in just getting their perspective." Improving the lives of clients was the reason this colleague worked in the organisation, and therefore she could meaningfully connect with the evaluation task.

Michael used reflective questioning to prompt his colleagues to think deeply about the work they were doing. To connect evaluation with the purpose of the organisation and make it useful on an operational level, Michael was consistently working in a way that embedded evaluation into routine operations and encouraged the team to think evaluatively. He was focused on making sure evaluative questions were part of normal conversation and shared the responsibility for undertaking monitoring and evaluation tasks by making it part of all roles. Making sure evaluation was everyone's business, the colleague from a southern African nation said:

> Michael wants everybody to be at the same level, to understand evaluation, to keep on talking about reflection, and, of course, to ask themselves, "What's my program achieving?" "What are the issues?" "What can we do about it?" Adopting evaluation as an integral part

> of programming so that it's de-mystified… integrating it in team meetings, in training, and in one-on-one deep sessions with the team.

For another colleague, an Aboriginal trainer, it was understood to be a challenging, but ultimately necessary series of tasks: "He helps us through a lot of our insecurities 'cause like, for me, it's a pain in the butt. But then again, you're getting all the information that you need from having these evaluations… because without it, we won't get any funding."

Kelvin's strategy for encouraging colleagues to use the evaluation system was to make the connection between the colleagues' desire for improvement in the lives of clients and the database. The interviewees were clear about why they were working in the non-profit sector. One employee said, "I love working with refugee communities." However, resistance to implementing the new evaluation system was high, and there was considerable opposition as reported with this comment: "For me, it's a very complex database. In the initial stage because it's a new thing, it took a whole lot of my time… It has brought with it a lot of administrative work." However, when Kelvin articulated the benefits for the client, acceptance for the role of evaluation increased. A colleague said,

> The new way of working with the outcomes baseline, I think is really good because it can measure the quality outcome for the client. We have evidence that they can apply themselves to that particular area in the community, which is really important. Previously, we didn't take it to that level.

Kelvin also frequently used analogies or metaphors to share the aspirational vision that he was working towards. Analogies were shared with co-workers, clients, and even funders to bring everyone to the desired vision. The external consultant noted: "A lot of the way he does this is through story-telling… It's more positive. It's strength-based." A colleague felt they had learnt how to bring people along by observing Kelvin:

> I'm learning a lot from him about how to communicate with people, how to share a vision, how to get people to contribute to that, or how they can relate it to their own vision… I've learned from him. It's really about helping people to align to what they are meant to do – as the purpose. Getting them on board.

In summary, finding shared goals was the prominent strategy the case study participants used to promote evaluation. This assertion builds upon the examples provided in Chapter 4 as colleagues and evaluators articulated how the participant made evaluation relevant and meaningful for others by making connections with individual underlying motivations and the purpose of the organisation. The examples are summarised in Table 16.

Table 16

Examples of Connecting Evaluation with Colleagues' Individual Aspirations and the Purpose of the Organisation

Assertion	Example from cases
Participants' predominant strategy to promote evaluation was to develop mutually beneficial goals that incorporated evaluation.	A/B/D: Use monitoring data to demonstrate changes in client outcomes and capture voices not often heard as this can be a strong motivator for colleagues who want more emphasis on the actual needs of target audience. B/C/D: Use analogies, metaphors, or simple explanations that connect short-term tasks with a long-term perspective regarding the value of evaluation. A/C: Find creative engaging ways to explain information and find connections with the overarching vision. A/B: Involve colleagues in collecting and sharing monitoring data with target audience and key stakeholders. A/D: Find the right level of perseverance and tenacity – know when to push forward and when to ease off. A: Understand the broader context in terms of organisational requirements, evaluation options, and how evaluation can be used. A: Articulate how an individual's evaluation task on position description will assist in achieving organisational goals or aligns with underlying value proposition. A: Incorporate casual prompts about the benefits of evaluation in general conversations. A: Encourage colleagues to build the evaluation capacity of target audience as an empowerment tool for clients and staff. C: Take time to form strong interpersonal relationships to understand individual aspirations and key motivational drivers. C: Invite colleagues to participate in any interagency, cross-sectional, or multi-stakeholder meetings to increase understanding of broad context and how evaluation can be of benefit. C: Support colleagues to express their vision for the organisation and make connections with evaluation using enjoyable and engaging methods. D: Incorporate regular reflective conversations that are genuinely seeking honest feedback and with an intention to make improvements so evaluative conversations become part of routine operations in non-threatening ways.

Assertion 3: Participants used multi-pronged individualised strategies to encourage and support evaluation

This assertion claims that the way participants tailored and individualised their strategies was key to supporting co-workers to be engaged with evaluation. The strategies presented across all

the cases strongly align with the social skills element of cooperative teamwork. The strategies were focused on meaningful communication, conflict resolution, and cultural competence. These strategies may be useful for understanding more about what the element of social skills looks like in practice. Chapter 6 will discuss these strategies in relation to the theory of social interdependence and the element of social skills, but the focus in this assertion is to detail the examples in depth from the perspectives of colleagues and evaluators.

Communication

Evaluators and colleagues provided examples of creative and engaging ways that the case study participants communicated to their teams about evaluation. Fred prioritised the consideration of the divergent preferences for working, engaging, learning, and contributing when he communicated about evaluation. A colleague felt that Fred had been creative in thinking about different techniques regarding how to engage the group as much as possible. She noted that a skill of Fred's was to "facilitate an experience. I did feel like there was a lot of autonomy to approach this stuff in a creative way." This level of open engagement and sharing was highly valued by one colleague who said:

> The thing that stood out to me that was most valuable was the discussions with other staff and just hearing about their experiences and also the kind of advice that they would provide… I guess I always felt that he had an openness to receiving that and he would never just shut people down.

Sally played a prominent role in assisting the evaluators to work with the team to adapt the tools to the context in which they were working. She was a source of support and constant encouragement for her co-workers. A colleague said,

> Sally monitored and provided knowledge on how to use the tools with the participants. Sally would conduct practice sessions with us to ensure we were delivering the tools correctly.

> There was constant contact and constant communication… very approachable… I felt extremely supported.

Another colleague reiterated that sentiment:

> Sally was a massive [help] – she really provided a lot of input in those conversations, and it was quite new to me being in that sort of role and having not ever done that [evaluation] before. It was really just checking in and making sure I was doing things correctly and getting the support when I needed it.

The basis for Michael's communication methods was to form strong relationships and involve the team in all parts of any evaluation. An evaluator noted this in regards to who represented the organisation at the evaluation stakeholder meetings: "He just worked by having everybody working together… all got different skills… They very much worked as a team. I think they planned as a team… they incorporated everybody together." This was confirmed by another evaluator who said,

> He does the team stuff pretty well. So he's got a good team of Aboriginal people all around him, and, you know, he's built up some good relationships, and I think that's the key to the success of the program… It was pretty evident that he wanted to involve all his staff in the process… learning together about all these processes… involving Aboriginal people was a priority.

This was supported by the Aboriginal members of the team who saw the working relationship as a mutual learning exchange:

> Myself and him – because we learn together, because there is a balance and [we] get more good conversation working with Michael and myself. Michael has learned the way how – Aboriginal trainers - how we can work within that community… he has been, "Learn with me,

> learn with me." We're learning together and knowledge passing – knowledge passing to the next generation and so on… That's why we walk together.

A colleague reflected upon Kelvin's own cultural background and said that while his life experience did enhance his capacity to communicate with others and understand their perspectives, he still promoted general strategies such as asking questions that would enhance everybody's capacity for more effective communication. The colleague said,

> I think that because of his own cultural background, he's more aware of how people from different cultures, particularly Africa, think or process information. But I also think it's not used as an excuse to say, "Oh, well, someone's from a different culture so they're not accountable." I'm sure you've heard the word *accountability* a lot because that's one of his favourite words… Yes, we're a multicultural organisation, but we still have to get the work done in a Western context, being mindful of other cultures. But we share. The great thing is we share a lot – by talking and asking each other questions… "What does that mean in your culture?" or "If you were still in your country, what would you do?"… Using each other's knowledge and understanding to enrich the organisational culture.

Conflict resolution

In regards to preventing and resolving conflict, Kelvin recognised the challenges of working with people coming from culturally diverse backgrounds who may approach things differently and have different value systems. He understood that working under strict governance, technological, and administrative requirements in an organisation in a developed country was different from what some staff might have been previously accustomed. The consultant also recognised that this was an issue in culturally diverse organisations and gave an example how issues can arise:

> It's about not getting them to change, but for us to be able to adapt and be smart enough to use our own capabilities and skills to still arrive at the outcome we need and then being able to deliver the boxes [evaluation]. A problem with a lot of organisations or companies that

> interface with people from different ethno-specific communities is that they get angry and frustrated because those communities or individuals don't fit what we want, in the way we want it. It's about tipping that up on its head and saying you know, "I hear you. I see you. I understand you. And I can work with you in a way that honours these customs or practices and then I will make it work at my end."

The consultant suggested that Kelvin, as a skillful communicator, was able to navigate through these sensitivities and find a way to maintain trust, goodwill, and respect. An example was in the way Kelvin was able to promote evaluation by taking opportunities to reflect on the work they were doing. The consultant highlighted how important Kelvin considered being honest:

> Modelling and showing the vulnerabilities and trying to gain trust by that reflective practice as well calling it for what it is, "We got it wrong. It wasn't right. I will change the rule." It's not about looking good. It's about authentic engagement and genuinely trying to create change that's sustainable.

In Sally's organisation there was a need to put in place some conflict resolution strategies as trying to embed evaluation meant countering resistance from some colleagues:

> He [a resistant colleague] had worked in community services for a long time. And I think that he felt the way community services was going was sort of down the bureaucracy tasks with like so much paperwork. He didn't always love doing the assessments with the participants of the program. He can find it uncomfortable sometimes, too, after building a rapport, going in and having to ask these questions. He found it very challenging.

This example of resistance, differences in educational levels, age, and tolerance for administration tasks were all evident across the team as noted by an evaluator, "And I don't think it's just culture. I think there's age as well." From another evaluator:

> It's almost irrelevant then what their cultural background is… not just their cultural background, but their employment background, and their education history, and where they are in life – because I know that there were two members of staff that were quite young, and one was a lot older and had family and had been in the space for a longer period of time and had sort of a different way of looking at it because he was a lot older.

The team appreciated the inclusive way in which Sally handled these challenging dynamics in communication. This colleague said,

> I actually think Sally was very good at that. She accepted everyone's strengths and areas for improvement quite equally across the team. And I think what Sally was very good at was playing on those strengths. [The resistant colleague] didn't always love implementing the tools from the assessments. We really helped one another. We were a small enough team to be able to do that, and I feel like we did that very well together and Sally was good at accommodating for that.

The evaluator said,

> She would make it work, of course, no matter what their background was… And the difference in treating those two age groups, she managed extremely well. So it's not just cultural background that you would be sensitive to. I think it's just having a really good emotional intelligence and being able to respond to people wherever they are at.

A number of Michael's colleagues clearly articulated how he effectively prevented conflict and dealt with conflict resolution by providing emotional support, encouragement, and offering safe opportunities to engage with evaluation. The colleague from southern Africa said, "People do not like it… There is always a fear about evaluation… I've seen him trying just to be a team player and working with people at their pace and knowing different people have different fears and different ideas." The Aboriginal trainer supported this sentiment: "He's a good boss in that way… if it's

something that he sees that is your weak spot, he'll come along side you and talk you through it. He's always done that with me. He knows my weak spots. And he knows my strengths as well." The other Aboriginal trainer expressed pride in the painting he had worked on with Michael and other members of the team that represented his way of thinking,

> It was my idea… So when I penned the ideas of the metaphors - the Western metaphor for [Aboriginal] people – sometimes they understand. Sometimes they don't. But the metaphor I did when it came out from my idea was really helpful. It is really helpful for [Aboriginal] people throughout Northern Territory - for [Aboriginal] people.

To support the concept of engaging around evaluation in safe and entertaining ways, an evaluator recalled his observations about how much fun an evaluation activity had been for the team:

> They loved it. You know they had a chance to think through what it is that they are doing in a critical way and to share their stories… We actually recorded stories on the video… They had a ball with that… It was about listening. It was about communicating. It was about hearing about each other's stories, questioning and that kind of thing as part of the process of gathering data.

Cultural competence

All the case study organisations had employees from a variety of culturally and linguistically diverse backgrounds. The strategies the evaluators and colleagues shared were similar to the multi-pronged communication and conflict resolution strategies already noted. However, the examples in this section highlight the degree of effort that participants would go to understand their team members as individuals.

One of the external evaluators working with Fred commented on the multicultural organisational setting with staff and target audience from different cultural backgrounds, including

Aboriginal people from remote communities, Aboriginal people from urban communities, and white Australian people:

> In this case it was cross-multicultural… you have people living in relatively traditional communities, you have people in urban communities, both who have moved for opportunities… When we talk about multicultural, accepting that there are different ways of working, they know what [to do] because they are working with many different people.

Fred had to think about how to handle these different circumstances when he was promoting evaluation and discussed these issues with the evaluator prior to commencement. The evaluator said that Fred was able to articulate, regarding an evaluation approach, that the organisation needed:

> Something that is going to go across [different locations]. It can't be too much targeted to remote community users or too targeted to urban users because we understand the way that our communities talk to us and what they expect from us… The motivational triggers, the resources needed and available, how critical questions are posed, especially in cultures that have different preferences for gaining and sharing information, none of these can be done in a single way.

Fred sought and valued input from all co-workers throughout the process as noted by this colleague: "Being respectful and appreciating Aboriginal and Torres Strait Islander views and opinions… what would and wouldn't work for them." The Aboriginal community development officer gave examples of how the working groups enabled Aboriginal co-workers to have input into the design, implementation, and communication aspects and reiterated the importance of respect and incorporating multiple perspectives:

> Ah, just respect. Just need to work together as a team… working out of your own little box and engaging with others. Others will see and have a different vision in some sense. Make

> you think different… everyone sees things differently… taking on board or considering, accepting, other people's feedback on how to do things differently… if you are encouraging others to contribute, then others will… They will see things differently.

Fred's individualised approach when promoting evaluation with the team was illustrated by this statement from a colleague:

> Understanding that people have different preferences and styles for learning and different paces of learning… it is a huge strength of his… catering one on one almost to people, "Will your learning style [fit] within this great realm of flexibility?" That respect for culture is built into that. I could see the clear link between flexibility and creating a space to respect and value the culture of the communities we work in.

Sally also played a prominent role in assisting the evaluators to engage with the team to adapt the tools to the context in which they were working. The evaluator said, "We had a lot of discussion around using tools that are validated cross-culturally… There was a lot of conversation around whether that's, you know, a good cultural fit – a good cultural tool?" In the research literature, the tool was validated for Aboriginal and Torres Strait Islander young people, but it was not accepted by co-workers. Co-workers resisted and stated there was never an appropriate way to ask an Aboriginal and Torres Strait young person those kinds of questions. A similar problem was found in relation to age as the tool had been validated with older people. Sally and the team were highly involved with these interactions, with the evaluator stating, "So we'd have more conversations around that than anything else… 'Is this an appropriate way to ask a young person? Can we think of a way? And can we do something different? Can we ask this question in a different way to make it more applicable?'" Sally helped the evaluator work with the entire team to find solutions that were appropriate to their audience.

In Michael's organisation, it was common practice for participants and colleagues to connect with the evaluation and tailor it on an individual level so that they understood what they were being

asked to do. An evaluator placed *respect* at the centre of the discussion when asked about how Michael promoted evaluation across such a culturally and linguistically diverse team. He said:

> I think there's a way of working that needs to respect and value other languages and cultures that cuts across all of this… the way that you approach these things with those people from diverse backgrounds, that makes a difference. The respect that you have for them as human beings, the respect for their values and their cultural background and their ways of being as well… You can't really work in that environment unless you apply those principles.

The colleague who was from southern Africa suggested that respecting individuals for their unique, but different abilities and capacities was how Michael tried to work around evaluation in an equitable way:

> From a background that's not English and new and trying to integrate, he's really gifted in doing equity… [Michael] invests his time to make sure that everybody's on board… It's not about equality. It's not about sharing the same information. It's about sharing. It's realising that some of it will be shared different to different people to bring everybody together. So that's his skill… It could be that we are sharing the same information or you're doing the same thing, but it doesn't mean that everybody understands. So you have to keep on working towards these different platforms for different people for their understanding. And that's what he does. A lot of skills and attitudes tended to come together because reflecting – believing the team and respect for cultures – different cultures. That's his biggest strength... it's just allowing different cultures to have an understanding. People work differently, and people's perspectives are always different.

The external consultant believed that Kelvin's attempts to understand his team on an individual level were based on the values that he held. In response to the question about how Kelvin handled the challenges of communicating about evaluation in a diverse organisation, colleagues said

that Kelvin was communicating in a culturally appropriate way. A board member said, “I think he’s got an astute cultural awareness in the way that he goes about his work… I guess there’s also that notion of culture of the organisation… he had skillsets in both of those that were happening in parallel.” Exploring what this actually looked like in practice, one of his colleagues provided this explanation: “He definitely puts the human being at the forefront of every conversation… he will really honour that person and their experience which is real for them… people feel respected by him, listened to… that modelling is really powerful.” The external consultant believed that Kelvin’s attempts to understand his team on an individual level were based on the values that he holds:

> He’s modelling for his people that it’s not a cookie-cutter service where you’ve got to do it the same way. If you really care about the person you’re working with, you need to understand them, too. And only when you understand them can you actually respond in an appropriate way… He comes from the perspective where each person is a unique individual and that you can’t judge someone, but you need to be able to meet them where they are at and really respect that everybody’s journey in life is different. That’s not just in the context of clients, that’s in the context of everyone; me as a colleague or a contractor, staff members, board members, people that you are building relationships with, government departments, or potential partners. There’s that values-based position that he comes from that really influences all that he does… He is relationship-oriented, and he recognises that if you want to really get the best out of anyone, what you need to do is you need to be communicating with them in an honest and transparent way.

In summary, this assertion has examined the social skills required of participants to effectively engage from the perspectives of colleagues and evaluators. These social skills were considered in terms of communication, conflict resolution, and cultural competence. Adapting engagement so that it was appropriate for individual styles and preferences was a key feature, as

was providing emotional support, encouragement, and offering safe opportunities to interact around evaluation. Table 17 summarises the examples identified from the case studies.

Table 17

Examples of How Participants Individualised Their Strategies to Meaningfully Engage with Colleagues

Assertion	Example from cases
Participants used multi-pronged individualised strategies to encourage and support evaluation.	A/B/C/D: Appreciate and find ways to use all the different skill sets and perspectives to achieve the tasks that the organisation requires. A/B/C/D: Use positivity, energy, interest, passion, and enthusiasm to encourage others to participate. A/B/C/D: Take time to listen to what others are saying, encourage discussions, and ask questions to understand different perspectives and engage in ways that are appropriate and comfortable for them. A/B/C: Tailor engagement strategies to allow for an equitable distribution of knowledge and provide additional support in appropriate formats. A/C/D: Respect and value differences. A/B: Involve colleagues in troubleshooting issues with evaluation tasks to collectively arrive at suitable solutions. B/C: Promote collaboration by setting up teamwork and involving everyone around evaluation tasks to learn from each other. B/D: Model the behaviour you want to see in others and offer practical assistance. C/D: Be aware of limitations and be willing to ask for assistance. C/D: Communicate with a wide range of people and translate different types of knowledge among different people across the organisation and beyond. C/D: Encourage participation and find ways of including everyone in the collaborative process. A: Adapt communication materials to consider working and learning at different paces and format preferences. B: Practice applying tools and methods in a safe unthreatening environment to build confidence. B: Tailor the evaluation methods to be appropriate for context. C: Think critically and continually question to probe for greater understanding. C: Identify, obtain, and incorporate support and resources from others. D: Try to empathise to understand the perspectives of others. D: Work towards understanding the lived experience of the individuals in the organisation. D: Communicate in honest, transparent, and appropriate ways.

Assertion 4: Participants intentionally chose their strategies to increase the likelihood of the change being sustainable

In contrast with many of the participants whose strategies were unplanned and relied upon seizing opportunities as they arose, the case study participants worked strategically and with intent. The strategies presented in this section extend beyond the examples shared by participants as recounted in Chapter 4. This assertion presents evidence of strategies that are examples of holding other people accountable and reflecting on the group dynamics that can be aligned with the elements of individual accountability and group processing. While many interview participants felt that their efforts were not going to be sustained, these case study participants provide evidence that their planned approaches may have increased the likelihood of their changes being sustainable. This section increases understanding of what participants had to do to embed evaluation into the organisational systems.

Holding other people accountable

Evaluators and colleagues recounted the strategies participants used to intentionally involve others, share responsibility, decrease the dependence on themselves to drive the initiative, and hold other people accountable. For example, Fred worked to ensure that the evaluation initiative in his organisation was not personality dependent. In 2015 an external evaluator discussed the risks of the initiative being personality dependent and proposed strategies for how to build in sustainability. One of the strategies Fred initiated was a change management process that transferred the responsibility of driving the initiative to other people in the organisation. His colleague said, “He really took a back seat at that point and started removing himself and released me to do more, with the understanding that I was trying to get out of there as well. It was like a progressive plan to build up capability within the team.”

Providing training, instruction manuals, short guides, peer support, and accountability mechanisms in work plans were the strategies used to ensure the use of the database became part of routine operations. Fred's colleague said,

> That part is sustainable because our team understand the database. Not just how it works, but why we need to do it. And the second part is that now there is accountability processes in place so there is going to be six-month peer-to-peer audits of the database by the managers... They can use that to learn from each other and their teams, but also identify where there are gaps or weaknesses.

This approach contributed to ensuring that this evaluation initiative was sustainable because Fred connected it to the core business of the organisation. This colleague said, "The way that we've integrated that framework into the database makes it more sustainable… They are passionate about and very on board about that framework, so to have that there and the database… It is embedded, it is integrated."

Fred's organisation was also actively recruiting operational staff who not only had community development skills, but the necessary cognitive skills to record monitoring information in the database. He encouraged the recruitment of staff with aptitude for evaluation, fostered development of these skills in their role, and monitored that development as part of routine management. As challenging as this was, the colleagues interviewed were on board with using the database, as shared by this Aboriginal community development officer: "I think it is just going to get more fine-tuned over the years as it goes." Similarly, from this officer: "It is much more kind of manageable and easy and will support us to do the monitoring work and really capture the story of change that the groups are going through."

Sally's intentional strategies and the approach to how the organisation implemented their evaluations made a significant contribution to making the program they were implementing sustainable. She committed to sharing information in multiple formats to generate further demand

and increase credibility. Throughout the entire initiative Sally was instrumental in making sure the findings were published and shared with a wide range of internal and external stakeholders. Not only was the evaluation incorporated into the organisation's strategic plan and the pilot developed into a service model, but by sharing the findings with multiple audiences across different platforms, the program and the evaluation was also likely to have made a contribution to the broader non-profit sector. However, beyond the impact of the evaluation initiative in isolation, one of the internal evaluators reported that this evaluation in particular had increased the profile of the evaluation unit: "I think there is a greater acceptance of the team and what we do." The service design advisor was also highly positive about the evaluation. She found the information useful for advocacy purposes. She said this evaluation had generated demand for more evaluative information:

> I think it would be wonderful if all our programs could be evaluated… I think it gave us a wealth of information as a starting point, and it was certainly very useful… articulating what had worked well and hadn't… We were really looking to build off that.

In addition, because of the valuable contribution of Sally and the team, the evaluation unit increased their efforts to incorporate a similar collaborative approach into the design of other programs. An evaluator said, "We recognised how important it was to have that close involvement… so more often now we try and get involved at an earlier stage so that we can have more of a role in developing the service model and the program logic together." Sally was also in a position to influence one of her colleagues who then moved into a more senior position. This colleague subsequently adapted a resource from the evaluation and implemented a short succinct client satisfaction monitoring tool. This colleague said, "And I've shared that survey across several different services… That survey has then gone out to those services. It allows for me to really get feedback around how I'm running this program and what they really feel we could do differently as a team."

Michael, similar to Sally, developed evaluation materials for external publication to generate demand for evaluation by creating a positive feedback loop. He proactively encouraged team

members to take every opportunity available to share the process of operation, outcomes, and information from evaluation to widely publicise the program. Over the past 10 years, the organisation disseminated over 20 pieces of documentation in different formats, and members of the team routinely discussed the program and evaluation in the public domain. Michael made evaluation reports and newsletters publicly available on their website and gave presentations at conferences. Producing these materials meant increased visibility at a local level and enabled the program to be referenced in publications developed by government departments and independent researchers. Importantly, these interactions also gave the organisation a platform to challenge inappropriate ideas coming from funders in a way that legitimised their authority without compromising the funding relationship.

Evaluators reported that Michael and his team took up shared measurement opportunities with other organisations and incorporated mutual accountability mechanisms. He saw the value in developmental evaluation, collective impact projects, and shared value partnerships as a means to draw the organisation away from output style accountability. Relationships with other stakeholders in the community, potential funders, other organisations undertaking similar or complementary programs, and external evaluators or researchers were sought, and new people invited onto the team. Participation on other reference groups, other collective impact structures, group training opportunities, and stakeholder meetings was also sought out and considered to be opportunities for learning, relationship building, and avenues to enhance ongoing collaboration. Representation on these groups was not left to Michael, but the responsibility was shared across roles. The team documented responsibilities and mutually agreed upon appropriate accountability mechanisms. All co-workers were encouraged to participate to share the potential opportunities across the team. Such participation continued to generate more interest in evaluation.

In Kelvin's case, while the immediate focus may have been on survival of the organisation, he was still implementing a person-centred approach and evaluation initiative to increase the

likelihood of sustainability beyond the current government funding cycle. The dilemma this organisation faced prior to implementing the changes was captured by this board member who said,

> You can't just be a lovely well-meaning community support organisation any more. You need to be well organised and structured and have a good business model to support the sustainability of the organisation. And how do you do that but not lose the empathetic good people and still have your caring culture?

In essence, the entire change process was about ensuring the sustainability of the organisation. Evaluation was considered to be a key component that was both essential in the short term for providing funders with the data they needed, but also essential for ensuring that the organisation was not dependent upon a restrictive grant cycle in the long term. Kelvin worked to ensure that the evaluation system was embedded within routine operations and supported the vision of the organisation and not the other way around. The systems were designed to measure their own achievement and demonstrate effectiveness in a proactive way. The external consultant said:

> What comes first is an individualised outcomes-based focus for the person… it was the approach to service delivery that came first, then being able to massage that in framing that in the way that met government reporting requirements… It didn't matter what the government was doing – [Kelvin] had to get the care for the clients' right first.

Proactively engaging and negotiating with funders to promote the way the organisation conducted business, evaluated, and communicated the changes was a key way Kelvin supported the sustainability of the organisation and the evaluation systems that were being put in place. Board members accompanied Kelvin to meetings with representatives from the government departments and recounted, "It was most definitely a negotiation… He was engaging with those services and explaining why things were changing." Being able to see the situation and communicate what was happening in a mutually beneficial way was seen as important by this board member:

> He has a particular skill set around evaluation of outcomes, and he is able to articulate that in the tender responses that then seems to align with what the Commonwealth [funder] is wanting… We're actively applying for tenders, some of which we may not have applied for in the past, and we're being successful in our applications.

This proactive approach meant that Kelvin collaborated with funders to learn together about what evidence was available and worth collecting and then incorporated the mutually agreed indicators into contracts that the organisation used to hold themselves accountable.

Reflecting on group dynamics

Evaluators and colleagues pointed to examples that indicated that the case study participants were strategically thinking about and implemented ways of reflecting on the group dynamics. They were finding opportunities to seek feedback from others about their work around evaluation. During the pilot project Sally used her social networks and took every opportunity she could to link with other sections of the organisation. This occurred even when they were not directly involved, even when the project had finished, and even when it was beyond her own organisation and involved representatives from other organisations and stakeholder groups. Sally formed networks, made alliances, connected with staff she had previously worked with, and instigated coalitions with other organisations to increase the profile of the project and the evaluation. Although informal, these relationships incorporated a two-way feedback mechanism from the outset. Sally also communicated updates throughout implementation and sought feedback on the working relationship and teamwork. As a result of this level of networking and embedding evaluation, an opportunity arose to share indicators with an external organisation. Other parts of the organisation also started asking for and receiving evaluative information.

Evaluators articulated how Michael had engaged with a variety of local independent researchers and evaluators over many years to seek assistance with demonstrating achievements, learning from external expertise, and seeking feedback on ways of working as a team and with other

organisations. This way of working also provided opportunities to answer key questions that the organisation wanted to explore. The questions could not be answered by the original templates, but required nuanced evaluative thinking and skills. The benefits for the organisation of an ongoing mutually beneficial engagement with external expertise ranged from providing funders with credible information that was considered unbiased, obtaining additional in-kind support, filling an expertise gap regarding research and writing skills, and providing critical reflection in a culturally safe way that could foster improvement. The long-term aspect of the working relationship meant that trust and appropriate ways of working, suited to the cultural context, could be developed over time. While building the capacity of the team to undertake monitoring, evaluation, and reflection was at the forefront of any interaction, having an independent perspective to stimulate new ideas was also useful for the organisation. Michael worked collaboratively with an external evaluator to find ways he could undertake evaluation appropriately with his team and use the findings to improve the program, as recalled by this evaluator: "He's learnt a lot from working with us, and I would see that we were able to help. The work was complementary, because there's the same worldview about evaluation… It was a beneficial relationship."

Evaluators and colleagues indicated that both Michael and Kelvin incorporated evaluative questions in routine meetings and general conversations to normalise making judgements and reflecting upon the teamwork dynamics. In Michael's team an Aboriginal colleague did value and enjoy the routine opportunities for reflection and saw them as an opportunity to seek out support if she required it:

> We just all gather around. We connect with our team. It's nice to hear what the other teams are doing… It's nice to get together… And then Michael contacts the team later on, after the meeting if he needs to talk with any of us individually about any issues that we're having.

In Kelvin's team there was also recognition that the increased level of accountability in combination with the new evaluation system and staff training, was supporting the sustainability of the organisation:

> Previously, we couldn't actually give any details on how dependent or independent a client was, and why or when they exited. And I don't think it's fair on the client. It's not fair on the other service… Definitely that accountability is something very new... I think this is the best position that we've ever been in.

This way of incorporating reflection about core business, the evaluation processes, and the team dynamics has provided examples of how case study participants ensured reflection at all levels became embedded in routine operations.

The strategies presented in this section of the cross-case analysis are an extension of the strategies shared by the majority of participants recounted in the previous chapter. In Chapter 4 the strategies were opportunistic and took advantage of circumstances as they arose. They could only be aligned with positive interdependence, promotive interaction, and social skills. The evidence presented here and summarised in Table 18 are practical examples of intentional and strategic ways of working that could align with individual accountability and group processing. While the majority of participants felt that their efforts were not going to be sustained, these case studies provide evidence of the strategic and intentional thinking required to embed evaluation into the organisational systems. A discussion of these findings in relation to Chapter 4 and social interdependence theory can be found in Chapter 6.

Table 18

Examples of Strategic Strategies

Assertion	Example from cases
Participants intentionally chose their strategies to increase the likelihood of the change being sustainable.	A: Formally transfer responsibility of ownership to other positions. A/D: Provide training, instruction manuals, short guides, peer support mechanisms, and incorporate accountability into work plans. A/D: Embed the evaluation tasks alongside other core business tasks that include routine accountability mechanisms. A: Recruit staff with aptitude for evaluation, foster development of this skill in the role, and monitor as part of routine management. B: Encourage others to adapt tools for their own purposes and embed within project design as an essential component. B: Network, form alliances, and talk about evaluation with others to build coalitions of support, generate demand, and seek feedback on relationship and teamwork. B: Collaborate and involve people in the process to foster further engagement in evaluation with two-way feedback mechanisms incorporated from the outset. B/C: Allocate responsibility among staff to publish in multiple formats and disseminate findings widely to generate further demand and increase credibility. C: Develop processes to hold staff within the team and across organisations mutually accountable to foster shared measurement opportunities. C: Share responsibility for monitoring and evaluation across roles, document responsibilities, and mutually agree upon appropriate accountability mechanisms. C: Incorporate evaluative questions in routine meetings and general conversations to normalise making judgements and reflecting upon the teamwork dynamics. C: Partner with critical friends, academics, other organisations, and evaluators to communicate and learn and use as opportunities to seek feedback on ways of working as a team. D: Incorporate prompts for reflection about core business, the evaluation processes, and the team dynamics in the organisational system to ensure reflection at all levels becomes institutionalised. D: Proactively negotiate with funders and learn together about what evidence is available and worth collecting and incorporate agreed indicators into agreements.

Summary

This chapter has presented the findings from four case studies to examine the experiences of Fred, Sally, Michael, and Kelvin. A cross-case analysis resulted in four multi-case assertions that focused the findings on their response to the proposed definition of an *evaluation champion* and the strategies participants used to promote, communicate, and embed evaluation. The voices of

participants' colleagues and the evaluators working alongside them were prioritised in this chapter to assist with examining the interactions among participants and their colleagues. Although participants were operating in different contexts, with different organisational goals, and at different levels of the hierarchy, there were similarities in the ways they engaged with their colleagues and the intentional strategies they used to consider sustainability. Each assertion concluded with a list of practical examples of the way participants worked. The next chapter combines these examples with the findings from the participant interviews. It will discuss the findings in relation to the extant literature and the theory of social interdependence to argue that *evaluation advocate* is a more appropriate descriptor than *evaluation champion* when trying to develop cooperative working environments.

CHAPTER 6 – DISCUSSION

This thesis commenced with a proposed definition of an evaluation champion that included a list of activities that may be indicative of what these individuals do in practice based on the literature and theory. The definition was initially collated to help answer the question, "How would I know an evaluation champion if I bumped into them on the street?" (Rogers & Gullickson, 2018, p. 56). The sources of literature came from the evaluation, business and innovation, health, and environment fields. Social interdependence theory provided a framework to assist with understanding how the indicative activities of evaluation champions may be related to establishing interdependent goals. As Chapter 3 detailed, the proposed definition did assist with *bumping into champions,* as evaluators and colleagues were able to nominate participants who matched this description. Chapters 4 and 5 examined the findings from the interviews with 17 participants and the four case studies. This chapter draws upon evidence from the previous chapters in combination with relevant sources of literature and theory to argue that *evaluation advocate* is a more appropriate descriptor than *evaluation champion* and demonstrates how to effectively structure cooperative teamwork.

Taking a step-by-step approach to develop a revised definition, this discussion chapter begins by taking the list of activities from the literature review as the basis for comparing with what participants did in practice. It then compares the findings with the extant literature and examines why, by drawing upon social interdependence theory, the label *champion* was not conducive to establishing cooperative working relationships. The next section describes the strategies that participants used to undertake the activities organised by the elements of cooperative teamwork from social interdependence theory. The chapter then focuses on explicating why participants were motivated to include evaluation and the attributes that enabled them to promote evaluation. It considers the findings around participants' knowledge, skills, and attitudes in relation to the literature on champions and advocates. The chapter culminates by articulating a revised definition

and field guide for evaluation advocates that could be useful to facilitate identification, recruitment, support, and development.

Activities

This section summarises the findings from Chapter 4 and provides a recap of the process used in the literature review to align the activities with the elements of cooperative teamwork from social interdependence theory. It then combines this information into a table that reprioritises the activity list with the most important at the top and least at the bottom. This section also analyses why, even though participants did see themselves represented in the list of activities, they did not want the label *evaluation champion.*

Alignment of activities with the elements of cooperative teamwork

As Chapter 4 highlighted, the proposed definition assisted with finding participants working in organisations and understanding what evaluation-related activities they might have done on a day-to-day basis. Evaluators or colleagues nominated participants for this research as people who were enthusiastically engaging with evaluation. They reported that all participants, to varying degrees, were effectively making evaluation meaningful and relevant. Examples included using recommendations from evaluations, sharing the findings with a range of different audiences, advocating for resources for evaluation, including evaluation in budgets, seeking out support to make evaluation relevant, and commissioning evaluators with expertise that met the needs of their organisations. As detailed in Chapter 4, when presented with the proposed definition, participants overwhelmingly and positively reported they did perform these activities and found the list to be a useful summary of the work they were attempting to do to promote evaluation. These findings confirmed that participants were employees who practised reflection and critical thinking and promoted evaluation among their colleagues (Rogers & Gullickson, 2018, p. 55).

As Chapter 2 detailed, the theory of social interdependence focuses on how the goals of team members are related and acknowledges that the type of relationship has an impact on expectations, interactions, and outcomes (Johnson & Johnson, 2015). In a cooperative relationship, the team members promote each other's efforts in a mutually beneficial way, meaning they are promoting their own goals at the same time. The theory posits that team members must purposefully structure the five elements of cooperative teamwork to increase the likelihood of cooperative efforts being successful: positive interdependence, individual accountability, social skills, group processing, and promotive interaction. The final step in developing the list of activities involved considering Stevahn's (2013) definitions of the elements because they provided a practical explanation of how an individual may apply the elements when working with a team on an evaluation initiative. Stevahn's (2013) definitions were used as the basis of assigning the element that was primarily or secondarily connected with the activities, with the connection being evident, but less important in a secondary position. While these were aligned against the elements for the purposes of enhancing understanding, they are clearly interconnected as each activity is related to more than one element. This thesis acknowledges the interconnections as important considerations when teams are structuring teamwork, but makes these delineations for the purposes of discussing the findings in depth.

The literature review aligned positive interdependence with the activities focused on advocacy, strategic thinking, and developing a shared vision because they were all activities requiring forward projection and the establishment of common goals. Promotive interaction linked with the activity *Motivate others and provide energy, interest, and enthusiasm* because it was about working with team members to see the potential for how evaluation can be a positive useful tool. The social skills element connected to the activities encouraging co-workers' involvement and participation because these interactions require a high level of sensitivity and appropriateness. The literature review aligned individual accountability in a secondary position against *Provide or access tools, resources, networks, and expertise* because there was evidence from other researchers that

champions were using their social networks to persistently remind co-workers of their need to invest effort in participating in evaluative tasks; there were examples of accessing resources to build strategic reasons for facilitating the contributions of individuals. The literature review placed group processing in a secondary position with *Help others to apply evaluative thinking, use evaluation findings,* and *Create opportunities for reflection* because the element is related to allocating time to evaluate and reflect on group dynamics. While the activity focused on applying evaluative thinking to programs or other organisational areas and the group processing element focused on evaluating team dynamics, there was sufficient overlap to assist with understanding what might be taking place.

Reprioritising the activities to place the most important at the top was based on the frequency of mentions of activity in consideration of social interdependence theory. Table 19 combines the findings from Chapter 4, activities reprioritised to reflect the level of support from participants, with the way the elements of cooperative teamwork were assigned to the activities. Almost all participants indicated that *Motivate others and provide energy, interest, and enthusiasm* was an activity they undertook. I received the highest rating on the list and was aligned with promotive interaction. In re-ordering the activities, participants also frequently and positively referred to *Consider how evaluation can be strategically promoted and used for organisational change*. In summary, activities that aligned with social skills and positive interdependence were prominent and featured strongly as many of the activities have a focus on fostering participation of those who may not want participate and acknowledge the diplomacy required to instigate opportunities for working towards a common goal. Group processing and individual accountability were the elements that aligned with two activities They were not the primary elements associated with the activities and they appeared lowest on the reprioritised list.

Table 19

Activities Reprioritised Based on Findings and Aligned with Elements of Cooperative Teamwork

Activities in reprioritised order to reflect level of support by participants	Positive responses out of a possible 17 participants	Alignment with the elements of cooperative teamwork
Motivate others and provide energy, interest, and enthusiasm	15 (88%)	Promotive interaction
Consider how evaluation can be strategically promoted and used for organisational change	14 (82%)	Positive interdependence
Assist, train, mentor, support evaluation while considering different perspectives, and encouraging others to contribute	14 (82%)	Social skills
Advocate for support and resources	14 (82%)	Positive interdependence
Ask and encourage others to ask critical questions and initiate discussions and debates	13 (76%)	Social skills
Develop engaging ways to explain details and develop common visions	13 (76%)	Positive interdependence
Help others to apply evaluative thinking, use evaluation findings, and create opportunities for reflection	12 (70%)	Promotive interaction (Secondary: Group processing)
Provide or access tools, resources, networks, and expertise	12 (70%)	Social skills (Secondary: Individual accountability)

Competition versus cooperation

This segment of the activities section examines why, although participants thought critically, reflected, promoted, valued, accessed, and used evaluation, they did not want to be labelled an *evaluation champion*. Even though the proposed definition in relation to the wording and activities resonated with participants, the label of *champion* did not. Drawing upon social interdependence theory, this section argues that the label of *evaluation champion* is not appropriate for people without technical evaluation skills and could undermine cooperative teamwork.

Some participants welcomed the use of championing as a verb, but the majority disliked the term as a noun. In the Macquarie Dictionary (2016) the first two definitions of *champion* relate to

competition, “someone who holds first place in any sport” and “anything that takes first place in competition” (para. 1). The next two definitions relate to confrontational situations, “someone who fights for or defends any person or cause: a champion of the oppressed” and “a fighter or warrior” (para. 1). When participants discussed their understanding of the term, they were more likely to describe themselves in ways that resembled the verb in fifth definition: “to act as champion of; defend; support” (Macquarie Dictionary, 2016, para. 1). Resistance to the term was a reason to explore why this was an issue.

One explanation that participants, colleagues, and evaluators gave for resisting the label was in relation to the perception that an evaluation champion would have technical evaluation expertise to share. At least half of the participants said they saw the label of *evaluation champion* belonging to someone who was an expert. Participants proclaimed to have low evaluation technical proficiency. Evidence from evaluators interviewed as part of the case studies concurred with participants and they did not rate the participants’ technical evaluation abilities at a high level, but suggested their skill set lay in advocating and providing support.

However, the main reason for the rejection of the *evaluation champion* label was because it had connotations with competition, sport, winners, and losers. Participants reported that it was not useful to be singled out when they were trying to create cooperative team environments where everyone could contribute. Humility featured strongly in the self-descriptions, and colleagues and evaluators corroborated their statements. They did not want any specific accolades or honours for their work, but instead preferred to take on a role of supporting and encouraging. Participants preferred team approaches that valued everybody’s contribution, and there was a sentiment that identifying a single champion could go against the work of making evaluation part of everyone’s role.

Participants were reluctant to single out any individual and especially not themselves because they valued positive, mutually beneficial team dynamics, appropriate ways of working in diverse contexts, and cooperative interactions. Evidence in this thesis suggests that participants did

see themselves, similar to evaluators, as being open to new ideas and committed to truth and standards of evidence, but also pragmatic and action-oriented, like decision makers and their co-workers (Neigher & Metlay, 1983). Consequently, there was an inherent constant tension that they needed to balance in their role and navigate an appropriate compromise between these ways of working. They saw themselves bringing co-workers together, finding compromise around conflicting values and intentions, and attempting to reduce misunderstandings. Developing trust in their teams by being trusting and being trustworthy was an essential component for how they developed and maintained cooperation (Johnson & Johnson, 2014).

Avoiding competitive situations and opting for cooperative strengths-based approaches were congruent with the participants' ways of interacting on an interpersonal level. As outlined in the literature review, individuals instigating conversations around evaluation need to be sensitive. Evaluation can make non-profit employees feel threatened and anxious, resulting in unhelpful attitudes and creating situations that are based on negative interdependence (Donaldson et al., 2002; Edmonson, 2003; Geva-May & Thorngate, 2003; Hyde, 2012; Taut & Brauns, 2003; Whitehall et al., 2012). With the potential for peers to feel anxious and reluctant to become involved with evaluation, the findings indicate that it was necessary for participants to undertake strengths-based approaches and activities designed to reduce the stigma associated with evaluation. Promoting evaluation in a non-profit workplace for these participants involved acknowledging that pre-existing underlying attitudes may contribute to a competitive starting point or negative interdependence.

One of the founders of social interdependence theory, Deutsch (2011), identifies that the underlying attitudes of an individual are an important concept for understanding whether a situation is likely to be one of cooperation or competition. This research has shown that participants attempted to use their positive attitude to develop cooperative situations with their colleagues. The findings align with Deutsch's (2011) suggested tenets for positive interdependence, "we are for each other," "we benefit one another" (p. 25). They also align with the need to avoid the competitive

situations that can be associated with evaluation, “we are against one another” and “you are out to harm me” (Deutsch, 2011, p. 25). If there was negative interdependence, participants might have needed to emphasise the positive relational elements and not draw any attention to competitive circumstances. Thereby, they perceived that the label *champion*, with sporting connotations and the potential to draw attention to an individual, was not conducive to creating a supportive environment for teamwork.

The literature includes examples where the title of *champion* has been bestowed upon people without the appropriate resource allocation, support, or consultation, to detrimental effect (Chubinski et al., 2019; Knight, 2017; Pascale & Sternin, 2005). Evidence from participants is in alignment with the literature that suggests that top down approaches do not result in positive outcomes and may do more harm than having not nominated champions (Chubinski et al., 2019; Knight, 2017). Even when Warrick (2009) generated guidelines for training, developing, and using champions, they suggested keeping the process informal and carefully considering the implications of using the title because it may not be acceptable for employees. Analysing the role of champions in different circumstances and contexts has also demonstrated differences in the capacity of champions to support change (Hendy & Barlow, 2012; Taylor et al., 2011). Hendy and Barlow (2012) found that while champions were initially highly effective, went beyond their roles, contributing ideas, and motivating others, “when required to shift their work organization-wide, and share ideas outside their professional culture, some champions responded with resistance, resulting in a lack of innovation spread” (p. 348). Hence, the label *champion* is only appropriate when the individual does have subject matter expertise in an area, when they can provide technical assistance to staff, when decision makers provide resources and support, and when the individual is willing to be identified as a champion. If any of these conditions are not in place, then the label may have unintended negative consequences.

It was not possible to ascertain from the extant literature what the response of nominated evaluation champions might be towards their prescribed title; Silliman et al. (2016a, 2016b) did not make reference to the label in their publications. However, this research has shown there was an incongruence between how participants viewed themselves and what they understood the term *evaluation champion* to signify. To summarise, while participants strongly acknowledged that the list of activities was representative of what they did in practice, nearly all participants rejected the label of *evaluation champion*. They stated that the label has the potential to create confusion, generate unwanted attention, feelings of shame, and contribute to miscommunication in relation to roles and responsibilities. Importantly, underlying these aspects, social interdependence theory provided an explanation for why these individuals were so focused on supporting cooperation instead of competition, especially in relation to the topic of evaluation. These interrelated issues have implications for how the field of evaluation could engage with people in organisations to encourage involvement.

Evaluation advocate was a preferable descriptor

As an alternative to *evaluation champion*, this research suggests that the term *evaluation advocate* may be a preferred title. In the Macquarie Dictionary (2016) *advocate* is defined as a verb: "to plead in favour of; support or urge by argument; recommend publicly" and "to support or argue on behalf of a person or group, or their position" (para. 1). It is also used as a noun: "someone who defends, vindicates, or espouses a cause by argument; an upholder; a defender" and "someone who pleads for or on behalf of another" (Macquarie Dictionary, 2016, para. 1). When discussing internal evaluation, Volkov (2011) suggests that being an advocate overlaps with being a change agent and should be defined to include "strong interest in and responsibility for the evaluation use" (p. 36). All these definitions are similar to the use of the word *champion* as a verb and correspond with the participants' self-descriptions. Three participants and an evaluator nominated the label *advocate* without prompting.

The term appears in the proposed definition in the activity, *Advocate for support and resources* that this chapter earlier aligned with positive interdependence. *Advocate* also frequently appears alongside evaluation champion in the literature. One example comes from Silliman et al. (2016a) where they found advocating to be the most highly recognised role of a champion: "Advocacy included 'speaking up' in policy groups but more often—and perhaps more effectively—interpreting the value of and opportunities for evaluation to peers, especially in mentoring, project teams, and professional settings" (p. 13). Another example comes from Taylor-Powell and Boyd (2008): "We have found that working with these individuals over time, cementing relationships, and encouraging reflective practice help to build a cadre of key advocates that can communicate the value of evaluation and share ECB responsibilities" (p. 61). Table 20 highlights a selection of articles about evaluation champions from the original literature review that include *evaluation advocates* or *advocate* in the same sentence as *champion.*

Table 20

Sources of Literature that Mention Advocates in Relation to Champions (Emphasis Added by Author)

Reference	Key quotation regarding advocate
Aponte-Soto et al., 2014, p. 43	Recognizing the underrepresentation of evaluators of color, program graduates also emphasized the demand for building CRE [culturally responsive evaluation] capacity through feeder programs like GEDI [Graduate Education Diversity Internship] by recruiting and training bright interns of color, sustaining the cadre of culturally responsive evaluators, and encouraging them to serve as CRE **advocates** and champions.
Chaudhary et al., 2020, p. 2	Further, Lennie (2005) found that the lack of clarity and confusion about ECB [evaluation capacity building], lack of understanding among participants about how the ECB outcomes addressed their evaluation competence needs, and lack of champions or **advocates** for the ECB process as additional challenges.
Christie and Vo, 2011, p. 557	The objective is not to demonstrate that one can do an evaluation, rather to train people who are leading evaluations and who are consumers of evaluation to be "evaluation champions" in their organizations; to be **evaluation advocates**, and informed evaluation consumers.
Cousins and Bourgeois, 2014b, p. 74	The DG [Director-General] is seen to be a strong **advocate** and champion of evaluation.
Gullickson, 2010, p. 34	Contribution 4 provides evidence of the resulting benefits, which **evaluation advocates** within organizations and external evaluators can use to stimulate interest and commitment to mainstreaming.

Reference	Key quotation regarding advocate
Howell, 2005, p. 111	We discovered that champions provide enthusiastic support for creative ideas by sheltering new ideas from premature evaluation, **advocating** new ideas, and recognizing the production of new ideas.
Johnson et al., 2004, p. 139	Assess existing champion (those who have power and act as **advocates** for the functional area related to the innovation) roles and leadership actions that can sustain the innovation.
Lambur, 2008, p. 45	Successful roles include management consultant, decision support, management information resource, systems generalist, expert trouble shooter, **advocate** for or champion of evaluation use, and systematic planner.
Mackay, 2002, p. 89	The role of M&E (monitoring and evaluation) **advocates** (or influential champions) within government.
Nevis, DiBella, and Gould, 1995, p. 79	**Multiple Advocates.** New ideas and methods advanced by employees at all levels; more than one champion.
Patton, 2008, p. 141	An **evaluation advocate** is not a cheerleader for the program, but rather, a champion of evaluation use.
Perrin, 2006, p. 37	**Advocates** or champions with connections close to the center of policy making are needed to obtain high-level commitment to an outcome orientation.
Pinto and Patanakul, 2015, p. 1180	In this study, project champions are considered “project **advocates**” or “policy entrepreneurs" who seek to influence other people in their organization regarding an issue or project.
Scheirer, 2005, p. 340	The importance of leadership and staffing was shown by the fact that more than three fourths of the studies that examined influences on sustainability cited the importance of a champion, someone who is strategically placed within an organization to **advocate** effectively for the program.
Silliman et al., 2016a, p. 1	Champions are supervisors or peers who act as **advocates**, facilitators, and role models for evaluation process, with influence ranging from encouraging individuals to guiding teams to changing organizational resources and policies.
Silliman et al., 2016b, p. 38	Strategic and program plans should incorporate evaluation champions as **advocates**, mentors, and trainers alongside evaluation and subject matter experts in all dimensions of evaluation training and management.
Stockdill et al., 2002, p. 21	Some roles that have been identified by a long-time evaluation capacity building practitioner who is also a case author are the • Champion role (often at a senior level within an organization) • Manager or coordinator of evaluation capacity building activities (which has elements of salesmanship and **advocacy** and could include organizing others to conduct evaluations, provide evaluation training, or provide evaluation advice • Technical evaluation functions In a small organization, all these roles might be combined into one.
Taylor et al., 2011, p. 421	Key features of project champions during each phase: Often build “**advocacy** coalitions” to advance initiatives.
Volkov, 2011, p. 31	Major role category: **Advocate** - Program advocate; **advocacy** for support; champion of evaluation; **advocate** for intended primary users; evaluation use advocate; advocate for the program’s target groups; **advocate** for the most vulnerable population; **advocate** for cultural justice.
Wade and Kallemeyn, 2020, p. 4	The ECB process helped develop or empower evaluation champions that valued, owned, and advocated for the evaluation…. This demonstrates how evaluation champions helped to facilitate evaluation practice; they constantly **advocated** for evaluation among staff.

Therefore, based on this literature, it is evident that the terms *champion* and *advocate* are either used interchangeably or the term *advocate* is used as a noun, verb, or adjective in association with *evaluation champion.* This thesis argues that the field of evaluation should delineate between *champion* and *advocate; evaluation advocates* are different from *evaluation champions.* While they have in common a willingness to advocate for evaluation, hold responsibility for evaluation use, and a desire for more training on evaluation in general, they differ in other key areas. *Evaluation advocates* may be less likely to have recognition or resources allocated from leadership, have limited subject matter expertise in evaluation, minimal interest in training on how to do evaluation, nor have a desire to do more evaluation tasks, and thus are not willing to offer evaluation technical assistance. *Evaluation champions* may have a higher level of evaluation technical expertise, be willing to assist colleagues do and use evaluation, and receive recognition, support, resources, and encouragement from people in leadership positions.

Another key difference between advocates and champions is in regards to the overall intent. If the intention is to work in cooperative teams to encourage everyone to contribute and make evaluation part of everybody's roles and responsibilities, then this is more likely to be successful if an individual holds the label *evaluation advocate* as opposed to *evaluation champion.* Drawing from the theory of social interdependence and holding connotations of competitive winners and losers, the label *champion* is not conducive to creating cooperative working environments focused around evaluation. *Evaluation advocate* is the label more likely to support the overall goal of cooperative teamwork around evaluation. Table 21 provides a summary of these paragraphs to delineate between the different labels.

Table 21

Distinguishing Between an Evaluation Champion and an Evaluation Advocate

Task	Evaluation Champion	Evaluation Advocate
Willing to advocate for evaluation	✓	✓
Willing to be responsible for evaluation use	✓	✓
Desires training on how to use evaluation	✓	✓
Undertakes activities listed in proposed definition	✓	✓
Has technical evaluation expertise	✓	–
Willing for others to ask them for technical assistance	✓	–
Willing to do evaluation	✓	–
Desires training on how to do evaluation	✓	–
Has recognition, support, resources, and encouragement from leaders	✓	Optional
Desires to develop cooperative team environments around evaluation where everyone can contribute	Less likely to be effective with the champion label	✓

Using the proposed definition from Chapter 2 as a basis, this section has analysed what activities participants enacted in practice. It considered the findings from this research in relation to the theory of social interdependence and the literature to understand how participants worked to establish cooperative relationships and avoid situations involving negative interdependence. The section outlined why *evaluation advocate* was a preferred label, highlighted some key references that use the terms *champion* and *advocate* almost synonymously, and then articulated their distinguishing features. The next section presents the findings at a more granular level; it moves from interrogating the list that assisted with *bumping into them on the street* to examine the strategies participants reportedly used to undertake the activities.

Strategies

This section discusses the strategies participants used to undertake evaluation advocacy activities. It discusses participants' strategies against each activity by highlighting relevant literature and aligning them to the elements of cooperative teamwork. The section focuses on strategies

where participants illustrated many detailed creative and innovative exemplars and thereby provided the strongest amount of evidence: positive interdependence, promotive interaction, and social skills. It begins with positive interdependence as this was the element with the highest number of connections to the findings. Promotive interaction follows and ends with detailing the strategies associated with social skills, which connected to two sets of activities. The section then shares the strategies where the research found only a limited amount of evidence: individual accountability, and group processing. It ends by drawing upon social interdependence theory to assist with analysing why there were fewer strategies identified for some of the elements.

Strong level of evidence

Finding shared goals using analogies, metaphors, and simple explanations: Positive interdependence

This segment will examine evidence that illustrates the strategies participants enacted to develop mutually beneficial working relationships around evaluation. The predominant strategy used to address the challenges preventing the uptake of evaluation involved participants finding shared goals between evaluation and their colleagues' aspirations. These were linked to positive interdependence, which involves creating shared identity, determining roles, clarifying the rewards, and identifying and allocating available resources (Johnson et al., 2011).

Participants reported that the way they promoted evaluation was by finding shared goals between evaluation and their colleagues' aspirations. They helped set up working relationships based on trust and made the connection among their co-workers, evaluation, and the organisational goals. Participants helped peers to see how their contribution to evaluation could assist with achieving their aspirations, how they could help others, and how they could progress towards achieving the organisational goals. They maintained focus on the long-term, big picture and directly linked it to the organisation's desired social outcomes. Participants used analogies, metaphors, diagrams, and lists to illustrate the benefits of cooperation and how valued and needed everyone's contribution was for mutual success.

Participants also removed barriers preventing colleagues from participating and found solutions to address the underlying reasons why a peer might resist evaluation. They considered if fear, dislike of change, mistrust, risk of personal criticism, or time pressure were issues, and then worked in constructive ways to address these barriers. Participants kept the focus on the desired outcomes of the organisation and reinforced, through participatory processes and group problem solving, that everyone needed to contribute if they were to achieve their ambitions. They attempted to ensure that the evaluation activities were not an end, but a means to achieving the overarching organisational purpose.

Participants' strategies in this research resonate to a certain extent with the examples of how evaluators can develop positive interdependence from the literature. Donaldson et al. (2002) suggest that discussing the risks and benefits of cooperation around an evaluation initiative is a strategy for managing evaluation anxiety. They recommend outlining the major benefits to individuals from evaluation and at the same time articulating how to manage the risks so the downside is negligible, "but you have to talk this through or they don't realize it" (p. 268). Other suggestions from the literature involve developing plans for evaluations in a collaborative ways that help to ensure participants are working towards a common goal. Preskill and Boyle (2008b) suggested: "Plan for and design the ECB [evaluation capacity building] effort… design their capacity building activities in ways that engage participants, are appropriate for their level of need, cover key concepts early on, are based on goals, and are practical" (p. 164). Stevahn (2013) suggested that a shared team goal will help to clarify the work focus, and allocating tasks will make it easy to understand who will be responsible. It should be meaningful, authentic, clear, tangible, and able to be divided into defined tasks. King (2007) also mentioned a plan in this suggestion: "A purposeful, written capacity-building plan that explicitly frames the evaluation process to teach people evaluation skills and positive attitudes" (p. 52). However, participants in this research did not always undertake such formal structured strategies.

Although in Fred and Sally's case studies there were formal plans established to set common goals that could link all the members of the team and included roles, responsibilities, and timelines, these were not common strategies. Predominantly, participants worked in more organic ways, using the tools they had access to, and created connections that would be meaningful for their individual colleagues. Examples from participants included developing visual representations, using the organisational plans that were already in place, and sharing stories that developed a common vision for what they wanted to see in the future.

Therefore, participants were effectively promoting group work around evaluation by tailoring their messages to connect with the shared goals. They created the conditions for positive interdependence to occur and established the basis of mutually beneficial cooperative working relationships that included evaluation. Participants were thereby well-positioned to use evaluation for the purposes of improving, informing decisions, communicating to multiple audiences, and influencing peers because they demonstrated how it could help achieve their aspirations and how it connected to organisational goals. Table 22 summarises participants' strategies and highlights relevant literature sources for each activity that related to positive interdependence.

Table 22

Activities, Strategies, and Literature that Align with Positive Interdependence

Activities (Rogers & Gullickson, 2018, p. 55)	Strategies	Relevant quotation
Consider how evaluation can be strategically promoted and used for organisational change.	- Support individuals to see how their evaluation task will assist in achieving organisational goals or aligns with underlying value proposition. - Use data to demonstrate changes in client outcomes and capture voices that are not often heard as this can be a strong motivator for colleagues who want more emphasis on the actual needs of target audience. - Invite colleagues to participate in any interagency, cross-sectional, or multi-stakeholder meetings to increase understanding of broad context and how evaluation can be used strategically. - Involve colleagues in collecting and sharing data with target audience and key stakeholders. - Support colleagues to express their vision for the organisation and connect with evaluation. - Show individuals how they would personally benefit and, in combination, demonstrate how evaluation could help achieve organisational goals. - Keep the focus on the desired outcomes of the organisation. - Encourage colleagues to build the evaluation capacity of target audience as an empowerment tool for clients and staff. - Understand the broader context in terms of organisational requirements, evaluation options and how evaluation can be used.	A purposeful, long-term ECB plan for the organization provides a blueprint for constructing a system of ongoing evaluation (King & Stevahn, 2013, p. 230). Plan for and design the ECB effort…. design their capacity building activities in ways that engage participants, are appropriate for their level of need, cover key concepts early on, are based on goals, and are practical (Preskill & Boyle, 2008a, p. 164).
Advocate for support and resources.	- Incorporate casual prompts about the benefits of evaluation in general conversations with a wide range of people. - Identify, obtain, and incorporate support and resources from others. - Explain the importance of evaluation to colleagues by linking directly to the organisation's desired social outcomes. - Use events happening across the organisation as catalysts to promote evaluation as a tool that can assist.	Strong interest in and responsibility for the evaluation use (Volkov, 2011, p. 36). Elements of salesmanship and advocacy and could include organizing others to conduct

Activities (Rogers & Gullickson, 2018, p. 55)	Strategies	Relevant quotation
	- Find positive reasons why individuals should participate. - Identify the reasons why colleagues were not able to contribute to evaluation, and then work constructively to address the barriers.	evaluations, provide evaluation training, or provide evaluation advice (Stockdill et al., 2002, p. 21). We have found that working with these individuals over time, cementing relationships, and encouraging reflective practice help to build a cadre of key advocates that can communicate the value of evaluation and share ECB responsibilities (Taylor-Powell & Boyd, 2008, p. 61).
Develop engaging ways to explain details and develop common visions.	- Use analogies, metaphors, or simple explanations that connect short-term tasks with a long-term, big-picture perspective regarding the benefits of evaluation. - Support colleagues to express how evaluation could benefit the organisation using enjoyable and engaging methods. - Articulate the common vision in a written, visual, or oral format that is meaningful for the individual, incorporates evaluation, and is connected to the organisation's purpose. - Make it personal by sharing analogies and individual journeys and using stories to connect individuals and evaluation to organisational goals. - Articulate how an individual's evaluation task on position description will assist with achieving the organisational goals or aligns with underlying value proposition. - Connect evaluation reasoning with colleagues' lived experience and use examples that are relevant to their life.	Team goal is: shared/ common, meaningful/ authentic, precise/clear/concrete…, subdivided into clearly defined/doable tasks, mutually understood (Stevahn, 2013, p. 44). A purposeful, written capacity-building plan that explicitly frames the evaluation process to teach people evaluation skills and positive attitudes (King, 2007, p. 52).

Providing encouragement by finding small and quick tangible wins: Promotive interaction

This segment will focus on examining how participants promoted evaluation among colleagues. These strategies align with promotive interaction, which is about meaningful interpersonal ways of providing support and encouragement that enable the common goal to be achieved (Stevahn, 2013). Encouraging, facilitating, helping, and exchanging are terms that are used when explaining how promotive interaction involves individuals working together towards the group goal (Johnson & Johnson, 2015). In this research, in addition to developing shared goals, the examples from participants, their colleagues, and the evaluators in the case studies provided substantive evidence that providing encouragement was one of the most common ways they promoted evaluation among co-workers.

Participants promoted evaluation by providing their peers with reassurance, enthusiasm, and support. They used their interpersonal skills to make evaluation appealing. Participants provided help, assistance, resources, materials, praise, feedback, and suggestions and promoted their co-workers' success. Participants also made suggestions of what they would not do; they would not link evaluation with performance management, not use confusing terminology, and minimise any top-down approaches.

The findings suggest that participants adapted the ways they provided encouragement depending on the context and their degree of influence. In the case studies where three out of four participants were in high positions on the organisational hierarchy, they used formal strategies. For example, in Case Study A, the participant established peer support mechanisms and working groups. Project-level participants, who had less power to initiate formal strategies, had to rely upon informal opportunities to make connections, insert enthusiasm, and interact in meaningful ways. The findings illustrate participants predominantly used informal strategies such as providing random acts of encouragement.

The literature includes additional examples of how to provide encouragement. A mix of formal and informal strategies can be beneficial that range from reorienting workspaces to establishing peer support structures and communities of practice (King & Stevahn, 2013; Preskill & Boyle, 2008a; Taylor-Powell & Boyd, 2008). Taylor-Powell and Boyd (2008) suggest not underestimating the power and potential for informal strategies being pervasive and influential:

> Use every opportunity, every teachable moment, and every serendipitous occasion to build evaluation capacity. This can include inserting comments in e-mails, engaging in hallway discussions, sharing articles and resources, and asking questions—approaches that are not necessarily planned or formal. (p. 67)

Table 23 summarises participants' strategies and highlights relevant literature sources for each activity that related to promotive interaction

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Table 23

Activities, Strategies, and Literature that Align with Promotive Interaction

Activities	Strategies	Relevant quotation
Motivate others and provide energy, interest, and enthusiasm.	- Start small and find simple and quick tangible wins by finding the projects and people that are ready to use evaluation. - Celebrate wins and congratulate colleagues by routinely providing feedback. - Use positivity, energy, enthusiasm, interest, passion, humour, and fun to encourage others to participate. - Gather momentum among people who are keen to bring resistors along and remain neutral with negative people. - Connect individuals who can help each other. - Use the group dynamics to foster positive relationships around evaluation experiences. - Recruit, support, and develop additional allies. - Take time to build rapport, provide emotional support, and have as many conversations as required for colleagues to understand the benefits. - Find the right level of perseverance and tenacity – know when to push forward and when to ease off. - Focus on strengths-based strategies that promote the benefits. - Create opportunities for participation to generate engagement and maintain momentum. - Use personal connections, persistence, and open communication to share benefits.	Use every opportunity, every teachable moment, and every serendipitous occasion to build evaluation capacity. This can include inserting comments in e-mails, engaging in hallway discussions, sharing articles and resources, and asking questions—approaches that are not necessarily planned or formal (Taylor-Powell & Boyd, 2008, p. 67). Arranging workspace to facilitate interpersonal access and communication…. Organizing opportunities to socialize around evaluation activities during the work day (King & Stevahn, 2013, p. 53).

Activities	Strategies	Relevant quotation
Help others to apply evaluative thinking, use evaluation findings, and create opportunities for reflection.	- Raise the topic of evaluation informally at meetings or in conversation. - Incorporate evaluation in everyday conversation to prompt reflection. - Incorporate regular reflective conversations that genuinely seek honest feedback and have the intention of making improvements. - Use tools like program logic or routine monitoring to assist with making evaluation tasks more proactive and efficient instead of reactive. - Provide reasoning and experiences that are persuasive about the value of evidence. - Model the behaviour wanted in others and offer individualised practical assistance and examples to facilitate involvement at the right level. - Facilitate everyone's involvement by building capacity with some in advance before engaging in formal interactive sessions. - Involve colleagues in troubleshooting issues with evaluation tasks to collectively arrive at suitable solutions.	Involvement in an evaluation process… Training… Technical assistance… Written materials… Technology… Mentoring / coaching… Meetings (workgroups, task force, committees)… Communities of practice… Internship… Appreciative Inquiry (Preskill & Boyle, 2008a, p. 157). The team program structure, organized around issues, helps break down silos and facilitates collective action, collaborative inquiry, group problem solving, and synthesis. Additional peer-support and learning structures, such as program area liaison structures, evaluation advisory groups, and mentoring structures (Taylor-Powell & Boyd, 2008, p. 63).

Communicating inclusively by identifying learning and engagement styles: Social skills

This segment will discuss how participants used strategies related to their social skills to engage a wide variety of diverse colleagues in the non-profit sector around evaluation. The element of social skills encompasses any and all actions undertaken to effectively interact with other people (Johnson & Johnson, 2015). Communication skills, conflict resolution skills, and cultural competence are required to get to know, trust, accept, and support co-workers, communicate unambiguously, resolve conflicts, and value and respect diversity (Johnson & Johnson, 2003b; Stevahn, 2013). As participants had worked in a team environment over the long-term, had experience working in diverse contexts, and had found ways to positively engage with their peers to promote evaluation, this segment examines the strategies and incorporates the literature on leadership and culturally appropriate ways of working into the discussion. The segment concludes with reference to a unique finding that differs from the theory and literature.

In regards to communication skills, participants in this research reported that they were aware of the multiple layers of diversity that existed in their organisations. They recognised not only multiple layers of cultural and linguistic differences among their peers, but also differences in education levels, aptitude for technology, age, gender, ability, tolerance for administration tasks, and preferences for learning and engagement. They were wary of labelling any one difference as more important than another. The participant responses aligned with this statement from Kirkhart (2010): “Categorical labels attached to personal characteristics such as race, ethnicity, religion, gender, age, sexual orientation, language, disability, and social class often give the false impression that naming accurately represents human diversity” (p. 401). To deal with this degree of diversity and effectively promote evaluation, they attempted to understand their co-workers as individuals and create supportive environments that were inclusive, equitable, and enabled the participation of as many people as possible.

Interactions on a one-on-one level were where participants, their colleagues, and evaluators reported that they excelled. Although it took time to cultivate relationships and required a high degree of personal investment, these strategies were reportedly worth the considerable effort. Participants engaged with peers on an individual level to find out what their aspirations were and then, by identifying their individual needs, preferences, and learning styles, showed them how evaluation could assist. No one size fitted all. Participants considered who was on their team and how best to bring those talents, perspectives, and worldviews together. Participants promoted equity and inclusion; they made co-workers feel comfortable to participate by being welcoming, respectful, supportive, and valuing their involvement. Participants recognised that to ensure the highest quality evaluation initiative and work of the organisation overall, they had to facilitate the inclusion of as many people with different worldviews as possible.

In the literature, their way of working is also referred to as *individualised consideration* or understanding their co-workers as individuals (Bass, 1999, p. 16). It appears in relation to developmental and transformational leadership and in the descriptions of champions (Howell et al., 2005; Howell & Boies, 2004; Patton, 2008; Rafferty & Griffin, 2006; Taylor et al., 2011). According to Bass (1999), individualised consideration is when the person pays attention to the differences among peers and discovers what motivates each individual. As noted in the literature review, champions in business settings have been shown to be flexible and adapt their approach to be useful for different audiences. Howell (2005) provides astute examples of individualised consideration, referring to champions who can hear and read people to understand their needs and then process information in ways that will be useful for them. Similarly, the different examples analysed in this research demonstrated participants' ability to tailor the promotion of evaluation to the unique circumstances that arose as participants worked alongside their colleagues and identified their individual needs, preferences, and learning styles.

In regards to managing conflict, apart from Fred's case study where he instigated a formal change management plan that included a communication strategy, there was minimal discussion about pre-planning communication strategies in advance or putting in place any conflict resolution strategies. This finding contradicts the literature, which suggests that planning for effective communication is imperative. This is emphasised by Preskill and Boyle (2008a): "Carefully planning and managing communication (a) methods, (b) sources, (c) content, (d) targets, and (e) frequency to successfully engage participants in the evaluation activities and to cultivate demand and excitement among participants…" (p. 451). Stevahn (2013) reiterated a similar message: "Agree on preplanned procedures for expressing conflict and dealing with the emotions it will generate" (p. 40). However, in this research participants were not intentionally planning or documenting their strategies in advance, but rather were using their intuition, ability to adapt to the context, and capacity to tailor the information on an as needs basis. Participants in this research were constantly considering the context, audience, and situation, monitoring for change, and tailoring the information as required, as recommended by Taylor-Powell and Boyd (2008): "Consider diverse needs, experiences, and evaluative responsibilities… Start where the learner (or the organization) is and build from there" (p. 67).

In regards to cultural competence, participants understood the context, they privileged multiple perspectives of their co-workers, and they highly valued personal relationships. They displayed an approach that fostered involvement, promoted equity, tailored engagement, and created a supportive environment for participation, no matter who was on the team. Participants valued diversity as a resource that could strengthen the process of their evaluation initiatives (Symonette, 2004; Yarbrough et al., 2011). They would use different strategies in different circumstances to be inclusive, respectful, and ensure that the voices of those less powerful were being listened to and able to lead the decision making. Strategies incorporated strengths-based approaches, the promotion of social justice, a holistic way of thinking, and aimed to "infuse the cultures of individuals, program implementers, groups, and communities into the inquiry process"

(Thomas & Parsons, 2016, p. 11). Participants recognised that including multiple perspectives was essential to understand the evaluation context and agreed with this sentiment: “Gathering as many perspectives as possible will provide the most accurate view of the program being evaluated” (Casillas & Trochim, 2015, p. 33).

The strategies examined in this research are similar to the extensive references from the evaluation field that illustrate working in ways that respect cultural diversity and are appropriate to context (AEA, 2011; Casillas & Trochim, 2015; Chouinard, 2014; Kirkhart, 2015; Symonette, 2004; Thomas & Parsons, 2016; Wehipeihana et al., 2010; Yarbrough et al., 2011). The way participants applied individualised consideration was also in alignment with the American Evaluation Association statement on culture as it includes acknowledging the challenges of cultural identity as an essential practice: “Attempts to categorize people often collapse identity into cultural groupings that may not accurately represent the true diversity that exists… The culturally competent evaluator recognizes and is responsive to differences between and within cultures and subcultures” (AEA, 2011, p. 7).

However, participants were reluctant to call their way of working cross-cultural, culturally responsive, or culturally appropriate evaluation. Although the examples from participants also resonated with the literature that focuses on cross-cultural practices, they either reacted negatively to the use of this terminology or were concerned that this description was too narrow. They did not think it adequately encapsulated diversity in regards to age, gender, levels of education, preferences for learning and engagement, and levels of aptitude with technology and administration tasks. Participants did not want to use singular cultural dimensions to define their peers, but rather preferred the option of acknowledging the multiple intersections of cultural diversity (Fujimoto et al., 2014; Kirkhart, 2010, 2015).

In summary, participants did not want to separate cultural competence from the other components of social skills. Instead, understanding their colleagues as individuals, referred to as *individualised consideration,* was more important for participants than any of the communication,

conflict resolution, or cultural competence skills. This research found evidence that this type of interaction was fundamental across all participants, no matter their position on the organisation hierarchy. Individual relationships were prioritised more than anything else. This finding differs from the extant theory and literature and may therefore be worthy of further research. In summarising participants' strategies, Table 24 illustrates that individualised engagement was the common essential strategy that occurred across all three of the activities.

Table 24

Activities, Strategies, and Literature that Align with Social Skills

Activities	Strategies	Relevant quotation
Assist, train, mentor, support evaluation while considering different perspectives, and encouraging others to contribute.	- Cultivate relationships and use personal connections to clarify the purpose of the interaction and make relevant for that individual. - Identify preferences for learning and engagement styles and accommodate preferences into all interactions. - Communicate in honest, transparent, and appropriate ways that allow for different preferences for engagement. - Find relevant ways of communicating the same message to different people about the reasons why the evaluation task is needed. - Collect the data in variety of ways, share the information in multiple formats and tailor the communication to the specific audience with the options determined by the people involved. - Provide practical examples, model the evaluation tasks, and facilitate involvement at the right level. - Understand the audience needs prior to sessions or workshops and identify some staff who may need additional support to understand concepts and terminology. - Find creative ways of engaging people with evaluation and embedding alongside other activities. - Take time to form strong interpersonal relationships to understand individual aspirations, purpose of interaction, and key motivational drivers, including enablers and barriers to participation. - Take time and opportunities to understand how a person's own worldview is different from others. - Create and tend the relationships that enable meaningful personal connections. - Respect and value differences. - Work towards understanding the lived experience of the individuals involved. - Tailor the evaluation methods to be appropriate for context. - Try to empathise to understand the perspectives of others.	Consider diverse needs, experiences, and evaluative responsibilities…. Start where the learner (or the organization) is and build from there (Taylor-Powell & Boyd, 2008, p. 67). Start every evaluation by fostering meaningful involvement—building the buy-in and trust of primary intended users, getting everyone on the same page, overcoming people's fear and evaluation anxiety, creating incentives to motivate involvement, nurturing an open environment (King & Stevahn, 2013, p. 380).

Activities	Strategies	Relevant quotation
Ask and encourage others to ask critical questions and initiate discussions and debates.	- Take time to listen to what others are saying, encourage discussions, and ask questions to understand different perspectives. - Allow others time to ask questions and engage in ways that are appropriate and comfortable for them. - Find opportunities for reflective practice to routinely occur in the project implementation cycle or day-to-day work. - Enable and support all members of the group to actively lead the process, allocate responsibilities, approve design, drive implementation, interpret findings, and control what happens to the information. - Take time to collaboratively work through challenging ethical issues to ensure the process is appropriate for context. - Ask questions in groups to listen to responses and encourage colleagues to hear each other and think in different ways. - Incite curiosity by encouraging others to interrogate data to answer their questions. - Tailor engagement strategies to allow for an equitable distribution of knowledge and provide additional support in appropriate formats. - Understand the situation of colleagues before sharing alternative possibilities they may want to consider or pursue. - Practice applying tools and methods in a safe unthreatening environment to build confidence. - Create a supportive environment where everyone respects each other's opinions and sharing feedback is encouraged in an appropriate way. - Think critically and continually question to probe for greater understanding.	A) get to know and trust each other b) communicate accurately and unambiguously c) accept and support each other d) resolve conflicts constructively (Johnson & Johnson, 2009, p. 369). Agree on preplanned procedures for expressing conflict and dealing with the emotions it will generate (Stevahn, 2013, p. 40).

Activities	Strategies	Relevant quotation
Provide or access tools, resources, networks, and expertise.	- Collaborate with others who already have pre-existing relationships and connections who can provide guidance, support, and advice, e.g., community reference groups, local committees, or advisory groups where colleagues, participants of the evaluation and community members can provide advice on the evaluation and exchange skills. - Adapt information to consider different paces and format preferences for working and learning (written, visual, audio). - Translate different types of knowledge between different people across the organisation and beyond. - Use the skills of knowledge translators and knowledge brokers to reduce jargon and make evaluation terminology relevant and meaningful. - Promote collaboration by setting up teamwork and involving everyone around evaluation tasks to learn from each other. - Appreciate and find ways to use all the different skill sets and perspectives to achieve the tasks that the organisation requires. - Decentralise decision-making power and enable voices that are not usually heard to actively participate in all aspects of the evaluation. - Play participatory games, ensuring people had ownership over the process, to learn through experience and problem solve together. - Facilitate engaging participatory approaches can stimulate adult learning around evaluation. - Consider and align the evaluation task to the skill set of the individuals involved. - Take a capacity building, community development approach and harness the strengths of the team. - Use participatory approaches that allow people to choose their style of interaction and approach to learning and communicating. - Be aware of limitations and be willing to ask for assistance.	Carefully planning and managing communication (a) methods, (b) sources, (c) content, (d) targets, and (e) frequency to successfully engage participants in the evaluation activities and to cultivate demand and excitement among participants (Preskill & Boyle, 2008a, p. 451).

Weak level of evidence

The discussion so far has focused on the strategies related to the elements of cooperative teamwork where the data found the strongest level of evidence: positive interdependence, promotive interaction, and social skills. The remaining segments focus on strategies connected to the elements where there was a weaker level of evidence and discuss why there might have been fewer examples identified for the elements of individual accountability and group processing.

Providing training, manuals, guides, and incorporating into work plans: Individual accountability

As outlined earlier, in a formal sense individual accountability is evident when all team members are assessed and the results about who needs more support and assistance to complete their tasks are given back to the individual and group; everyone is clear about what they and everyone else needs to do to complete their share of the work (Johnson & Johnson, 2015). In another sense, this element exists when all of the individuals involved have been personally responsible for contributing to the success of the goal and feel ownership by being able to present, explain, and defend the final product (Stevahn, 2013). Although this research found some instances where project-level participants included individual accountability as part of the way they promoted evaluation, I did not find evidence of participants asking their co-workers to undertake individual accountability tasks related to evaluation. The evidence predominantly came from participants who were in senior-level positions. For example, in Case Study D, Kelvin included evaluation as part of the project management database to support individual and organisational accountability for evaluation, and in Case Study A, Fred held individuals accountable through work planning and embedding evaluation into job descriptions. However, overall, there were minimal examples of strategies that aligned with individual accountability.

In relation to this element the evaluation literature suggests that developing data management systems, creating tools and templates, or updating job descriptions to incorporate evaluation roles could be strategies aligned with individual accountability (King, 2007; King &

Stevahn, 2013; Taylor-Powell & Boyd, 2008). Stevahn (2013) also makes a range of suggestions: "Provide templates for working through the steps of inquiry, calendars for developing timelines and targeting benchmarks, agendas for team meetings, 'To Do' charts for specifying roles and responsibilities, outlines and language for each MOU [memorandum of understanding]" (p. 40). Table 25 summarises participants' strategies and highlights relevant literature sources for the activities that relate to individual accountability.

Table 25

Activities, Strategies, and Literature that Align with Individual Accountability

Activities	Strategies	Relevant quotation
Provide or access tools, resources, networks, and expertise.	- Provide training, instruction manuals, short guides, peer support mechanisms, and incorporate accountability into work plans. - Embed the evaluation tasks alongside other core business tasks that include routine accountability mechanisms. - Encourage others to adapt tools for their own purposes and embed with project design as essential component. - Share responsibility for monitoring and evaluation across roles, document responsibilities, and mutually agree upon appropriate accountability mechanisms. - Formally transfer responsibility of ownership to other positions. - Allocate responsibility among staff to publish in multiple formats and disseminate findings widely to generate further demand and increase credibility. - Develop processes to hold staff within the team and across organisations mutually accountable to foster shared measurement opportunities. - Recruit staff with an aptitude for evaluation, foster development of this skill in the role, and monitor it as part of routine management.	Work to clarify the focus… specific tasks… who will be responsible… MOU among teammates (to establish internal group functioning)… (to set a clear focus, calendar for checking in and helpful modes of communication) (Stevahn, 2013, p. 40). Infrastructure to support specific components of the evaluation process (King & Volkov, 2005, p. 14). Provide templates for working through the steps of inquiry, calendars for developing timelines and targeting benchmarks, agendas for team meetings, 'To Do' charts for specifying roles and responsibilities, outlines and language for each MOU… (Stevahn, 2013, p. 40). An internal reporting/monitoring/tracking system and an effective communication system with the capacity to explain evaluation processes and disseminate findings to stakeholder groups… (King & Stevahn, 2013, p. 231). Every member of the organization needs to understand that evaluation is a part of his or her job description, and there is a structure in place to support people in learning about what this means (King, 2007, p. 53). Data management systems are necessary to facilitate creation, management, and use of data, and can incorporate question banks for customized data collection, Web-based data processing, templates for using and communicating data, and processes for monitoring data quality and sharing lessons learned (Taylor-Powell & Boyd, 2008, p. 63).

Incorporating evaluative questions into meetings and conversations: Group processing

The elements of cooperative teamwork include group processing for the purpose of improving the effectiveness of the team. Group processing encompasses identifying helpful and unhelpful actions, maintaining working relationships, and deciding what needs to change or continue (Johnson & Johnson, 2015). Stevahn (2013) suggests that this element can promote success because evaluating the team dynamics and identifying changes will likely contribute to enhancing effective teamwork. However, similar to individual accountability, for the project-level participants there was not a substantial level of evidence of strategies that aligned to this element. Although some project-level participants shared a few such strategies, it was the senior-level participants who articulated how they managed group dynamics and encouraged reflection among their team. For example, in Michael's case study, he incorporated group reflection into weekly team meetings.

Practical strategies from the evaluation literature include this suggestion from Stevahn (2013): "Group processing forms for routine reflection — verbal and written — to systematically track and revisit what worked well, what needs refinement, and suggestions for advancing progress" (p. 40). Participatory reflection activities and interactive strategies can be engaging, strengths-based, entertaining, and insightful ways of incorporating opportunities for reflection (Stevahn & King, 2016). Many of the suggestions focus on incorporating time for reflection in with the other activities that are taking place, incorporating feedback mechanisms into decision-making processes, and documenting the process as implementation occurs (King & Stevahn, 2013; King & Volkov, 2005; Taylor-Powell & Boyd, 2008). More formal recommendations include establishing an advisory committee to ask for feedback (Patton, 2008) and formally evaluating the initiatives (Preskill & Boyle, 2008a). Table 26 summarises the participant strategies and highlights relevant literature sources for the activities that relate to group processing.

Table 26

Activities, Strategies, and Literature that Align with Group Processing

Activities	Strategies	Relevant quotation
Help others to apply evaluative thinking, use evaluation findings, and create opportunities for reflection.	- Incorporate evaluative questions in routine meetings and general conversations to normalise making judgements and reflecting upon the teamwork dynamics. - Incorporate prompts for reflection about core business, the evaluation processes, and the team dynamics in the organisational system to ensure reflection at all levels becomes institutionalised. - Collaborate and involve people in the process to foster further engagement in evaluation with two-way feedback mechanisms incorporated from the outset. - Partner with critical friends, academics, other organisations, and evaluators to communicate and learn and use as opportunities to seek feedback on ways of working as a team. - Network, form alliances, and talk about evaluation with others to build coalitions of support, generate demand, and seek feedback on relationship and teamwork. - Proactively negotiate with funders and learn together about what evidence is available and worth collecting and incorporate agreed indicators into agreements.	Documenting simple aspects of the process (King & Stevahn, 2013, p. 232). A feedback mechanism in the decision-making process (King & Volkov, 2005, p. 15). Reflection is a must—i.e., make and take the time for reflection, both as you direct the evaluation process and once it is finished (King & Stevahn, 2013, p. 381). Program and evaluation learning are best integrated into practice… when the process includes time for reflection (Taylor-Powell & Boyd, 2008, p. 59). Interactive Strategy: …Cooperative Interviews… Round-Robin/ Check-In… Fist-to-Five… Dot Votes/Bar Graphs (Stevahn & King, 2016, p. 72). Group processing forms for routine reflection — verbal and written — to systematically track and revisit what worked well, what needs refinement, and suggestions for advancing progress (Stevahn, 2013, p. 40). Establishing an evaluation advisory committee… (Patton, 2008, p. 139). Evaluation of evaluation capacity building activities and processes (Preskill & Boyle, 2008a, p. 452).

An explanation for the lack of strategies related to group processing and individual accountability

This section so far has presented the participants' strategies for promoting evaluation. The discussion has demonstrated the high volume and quality of strategies from all the participants that aligned with the elements of positive interdependence, promotive interaction, and social skills. Most participants' capacity to influence was at the interpersonal level and they used a wide variety of small-scale strategies. Participants appeared to favour cooperative approaches, taking advantage of opportunities as they arose, and avoiding any competitive situations with peers due to a combination of logistical reasons and social psychological barriers. The next segment will examine why only a minority of participants drew upon strategies that aligned with all five elements of cooperative teamwork, including individual accountability and group processing.

From a logistical standpoint, one explanation for this absence might be related to participants' level in the organisation. This thesis suggests that there were limited examples of strategies that related to individual accountability and group processing because participants were in relatively low hierarchical positions that restricted the degree of influence over the work tasks of their co-workers. Project-level employees may have difficulty establishing the complete conditions for cooperation to occur (Tjosvold et al., 2003). They might not be in positions that have the authority to hold individuals accountable or to ask peers to take time out to perform additional evaluation tasks. If strategies included encouraging peers on a horizontal level, managing up to influence decisions, or supporting on-the-ground staff, the project-level employees would not be able to hold any of these co-workers to account. Similarly, regarding group processing, incorporating reflective pauses and taking time to review the outcomes of the team in addition to other organisational, programming, and evaluation considerations might not have been prioritised by project-level participants. Promoting evaluation by finding shared goals, providing encouragement, and supporting inclusion might be beyond participants' normal roles and therefore leave minimal

time for being able to incorporate intentional strategic plans for actioning change on a structural level.

Another reason for the minimal focus on individual accountability and group processing might be because of the sensitivity required to instigate conversations around evaluation. As outlined earlier, peers might have felt anxious and reluctant to become involved with evaluation so participants might have been trying to establish an environment that was based on cooperation and not on competition (Deutsch, 2011). As such, where there is not only a negative interdependence situation, but in addition, when participants came from a low hierarchical position, they might have needed to emphasise the positive relational elements. Participants might have been reluctant to ask their co-workers to undertake accountability tasks because it did not align with their way of supporting peers. Strengths-based approaches that encourage their co-workers to continue doing good work or highlighting achievements to demonstrate to others what might be possible are more in alignment with their way of interacting on an interpersonal level. Focusing on creating shared goals, providing encouragement, and including diverse perspectives enabled participants to minimise the feelings of anxiety while promoting empowering strategies.

This section of the thesis has moved beyond comparing the extant literature about how to identify participants with what they did in practice to examining in detail how they work with others to promote evaluation. It investigated what participants did in practice and how they worked with colleagues. The section shared examples of strategies used to promote evaluation and demonstrated that without being at a high hierarchical position or having a degree of influence, it was likely difficult for participants to implement strategies that aligned with all five elements of cooperative teamwork. The next section delves deeper to examine why participants showed an interest in wanting to incorporate evaluation into their work.

Motivations

This section examines participants' underlying motivations and values. It discusses their strong commitment to addressing social inequalities. Participants wanted judgements about the effectiveness of their projects, programs, or policies, and they were looking for a systematic approach to analysing the available evidence. This section demonstrates how they were working to build a culture of evaluative inquiry, a form of organisational learning that connects personal and team level growth and development (Preskill & Torres, 1999, p. 58). Drawing similarities with suggestions from the literature, this section highlights how important it was for participants to find opportunities for evaluation that demonstrated a clear value proposition for their peers (White et al., 2018). It concludes by drawing together their motivations and their strategies from the previous section to discuss the implications for embedding evaluation in organisational systems.

Participants in this research had a personal connection to the work they were doing and overtly expressed their commitment to addressing social inequalities in their communities or among the target audience of their organisation. Other researchers of champions identified a similar drive for change, even if the focus of the commitment differed. Taylor (2008) found the champions in his research had a strong personal commitment to environmental sustainability (p. 2). Silliman et al.'s (2016a) research into evaluation champions found there was a desire for "making a difference" emphasised beyond the expectations formalised in their job descriptions (p. 11).

These notions of having a personal connection to a cause and wanting to make a difference are also strong characteristics of people who work in the non-profit sector (Drucker, 2005; Smith-Ruig, 2018). However, the point of difference for participants in this research compared with many others in the non-profit workforce is in regards to the additional underlying features of reflexivity and being open to criticism and supervision. As Chapter 1 discussed, among the workforce in the non-profit sector there can be resistance to change and a reluctance to question basic assumptions and practices (Gill, 2010; Lyons, 2020). Participants in this research were reflective practitioners who

were constantly undertaking self-assessments to see where they could gain additional skills and knowledge. While they recognised that evaluation could assist with meeting the needs of their organisations, they also openly acknowledged that they would need additional skills and knowledge to incorporate evaluation. Recognising their lack of evaluative expertise was a constant driver for participants to seek out new knowledge and source external advice. Participants provided many examples of how they had actively sought opportunities for supervision from someone external to the organisation or who had a complementary skill set that they could learn from. They also understood the importance of feedback on their work and constructive criticism for their professional growth and development. Participants in this research wanted to make a difference, took action to learn and improve, and then wanted to know how they were doing.

Hence, the main reason participants reported they were motivated to incorporate evaluation was because they wanted judgements about the effectiveness of their work. Participants were working in the non-profit sector because they wanted to help other people and contribute to social improvement. They were undertaking tasks in these organisations, delivering programs, or managing projects that all had a purpose of making positive changes in people's lives. Social benefit was desired, and they were looking for a process that could help them answer their *so what* questions. These were questions that resemble Davidson's (2005) examples when she introduces evaluation as a means of assessing value: "Is it better than what we had before? Is it better than the other options we might have chosen? How else might it be improved to push it to the next level? What did we learn from trying it out?" (p. 1). Schwandt (2018) similarly suggests that practical knowledge traditions recognise that people want answers to "what should we do?" questions (p. 131).

In this research, participants were looking for a way of gathering evidence that could be synthesised into making conclusive statements about the value of their work. They wanted answers to questions about their work so they could undertake a process of judging their programs to be

good or needing improvement based on evidence. They were looking for a systematic approach to analysing the available evidence and making a judgement about their programs and organisation. Although participants did not overtly articulate the components, based on how they described what they were seeking, they wanted to apply evaluation logic, systematically using evidence to make a judgement about their work, and they sought out approaches and tools to assist. Participants reported being motivated to include evaluation in their everyday practice because they valued the insight that evaluation logic could bring to their work.

They were open to exploring tools that might help find out about the difference their work was achieving and if they could do more with the resources they had. This aligns with the findings from Silliman et al.'s (2016a) research:

> Interest in evaluation grew from intense interest in a discipline, whether livestock or crop production, nutrition or food safety, and in clientele—producers, youth, or citizens of their county. Many expressed strong commitment to the ideals and institution of Cooperative Extension and viewed evaluation as a means to "tell the Extension story," improve programs, and make a difference in the community. (p. 12)

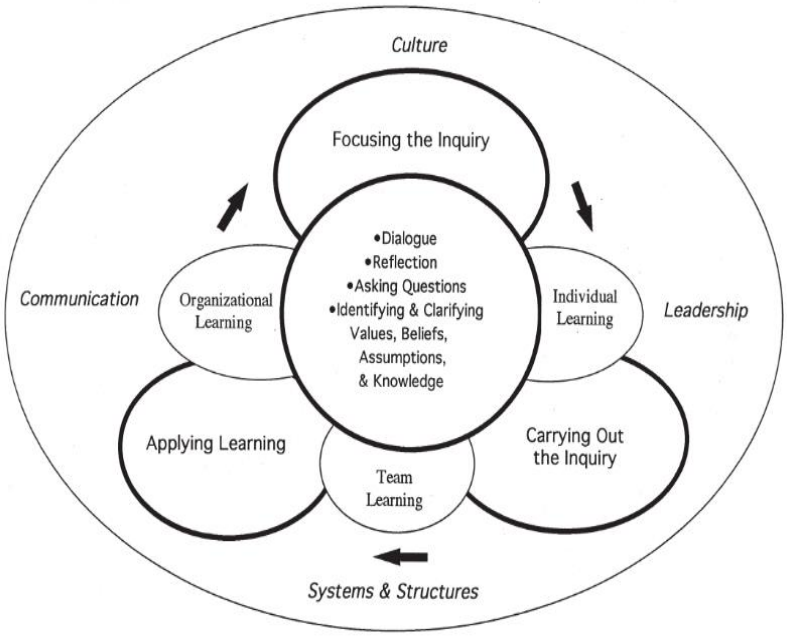
Participants also realised in the non-profit context they needed answers to meet multiple demands for information. They could see the value in evaluation for improving, learning, and communicating their worth as an organisation to multiple audiences, including funders, the public, and the decision makers in their organisations. Participants at all levels were thinking and reasoning evaluatively and attempting to work with their co-workers to find opportunities where evaluation could assist with organisational learning. Similarly, Silliman et al. (2016a) also found that evaluation champions "described evaluative thinking as an extension of their personality, training, and/or programming experience" (p. 9).

Participants were therefore attempting to integrate evaluation into their colleagues' everyday practice and make evaluative information available for improvement, for decision making

purposes, and for communicating to multiple audiences. These attempts closely align with the concept of evaluative inquiry; by asking questions, talking and sharing knowledge, values, beliefs, and assumptions, co-workers can learn from each other, support improvement, and develop positive change (Preskill & Torres, 1998, p. 191). Participants' responses were related to the elements in the centre of the Preskill and Torres' (1999) model for Evaluative Inquiry Learning Processes included in Figure 16.

Figure 16

Learning Processes of Evaluative Inquiry (Preskill & Torres, 1999, p. 45)



In summary, participants reported that their motivations for incorporating evaluation were because they wanted judgements about the effectiveness of their work. They wanted to build a culture of evaluative inquiry, and the model represented above is indicative of what they were trying to achieve. However, while this research found participants with similar motivations and similar aspirations for a culture of evaluative inquiry, there were differences among participants in regards to the degree of sustainability of their evaluation initiatives. The next segment uses evaluative inquiry (Preskill & Torres, 1999) to illustrate the differences between strategies undertaken by the

project-level participants compared with evidence from senior-level participants. It maps the key features of evaluative inquiry and evidence from this research against the elements of cooperative teamwork from social interdependence theory to provide insights into how participants increased the likelihood of embedding evaluation within the organisational system.

Embedding evaluation in the organisational system: Differences among participants

This section concludes by discussing the differences among participants that had implications for embedding evaluation in the organisational system. Although all participants were motivated to build a culture of evaluative inquiry and influenced their peers to engage with evaluation, only participants in senior-level positions and participants who influenced people in senior-level positions incorporated intentional strategies and strategic thinking that increased the likelihood of making their efforts sustainable beyond their personal involvement. Social interdependence theory can provide insights into the relationship between hierarchical position and the strategies participants used. This segment will highlight specifics from the case studies where participants created mutually beneficial interactions and cooperative working relationships using intentional strategies based on trust. This segment argues that as their strategies aligned with all five elements of cooperative teamwork, these participants increased the likelihood of embedding evaluation in their organisational systems.

As discussed in the previous section, project-level participants were less able to influence organisational processes and systems to make decisions. They said their key strategies for embedding evaluation included keeping evaluation on the agenda, using evaluation for advocacy, and being opportunistic to connect evaluation with other plans. They kept it simple, manageable, useful, and appropriate to audience and context. They also used persuasive communication techniques. Project-level participants recognised themselves as people who could keep the momentum going through their influential communication approaches and who excelled by generating enthusiasm for the potential of evaluation.

Many project-level participants believed that if they were not present, advocating for evaluation, the initiatives would not be sustained. When asked about sustainability, project-level participants said they helped people to understand the value and purpose, linked evaluation to the benefits the organisation was seeking, and garnered support from different sections of the organisation. However, they were not confident that their initiatives would continue beyond their involvement. This finding resonates with the research on sustainability of evaluation capacity building initiatives. Wade and Kallemeyn (2020) found that employees recognised how fragile and personality dependent evaluation initiatives could be:

> Turnover and potential turnover of key evaluation personnel was the main source of anxiety for organizations around sustainability… Although real turnover was an issue, the fear of potential turnover was most commonly related to the instability of evaluation within organizations. (p. 5)

In contrast, this research, perhaps not surprisingly found that, compared with project-level employees, senior-level participants had a greater scope of influence. In addition to encouraging evaluative thinking and appropriately promoting the benefits, they also considered evaluation capacity, worked with intent, and took a more strategic approach to developing a culture of evaluative inquiry. The case studies provided examples of participants who were moving towards a sustainable approach to embedding evaluation. These participants were still promoting evaluation to co-workers by finding ways of connecting individuals and their role in evaluation to the future vision of the organisation, and, like the project-level participants, they were also using multi-pronged individualised strategies to encourage and support teamwork in their diverse settings. However, while they remained focused on embedding evaluative thinking, they also considered evaluation capacity and developed systems. They incorporated strategies that aligned with individual accountability and group processing.

The literature supports the finding that only when participants were at a senior-level on the organisational hierarchy or in a position of influence over senior-level colleagues did they have the capacity to make intentional plans and put in place structural changes to develop the systems and processes required to embed a culture of evaluation (Bäck et al., 2020). For example, in Case Study A, the senior-level participant established peer support mechanisms and working groups. By contrast, project-level participants who had less influence over other employees to initiate formal strategies had to rely upon informal ways to connect, provide support, and have meaningful interactions. Therefore, individuals in senior-level positions or who were centrally located in their network were ideally placed to drive a strategic and comprehensive approach to evaluation that could support improvement and source the technical expertise required (Newcomer & Brass, 2016). This is an important finding if the aim is to embed evaluation in an organisation in a sustainable way.

The literature also acknowledges that champions may work differently at different levels (Schön, 1963; Shaw et al., 2012; Straith, Adamowski, & Reilly, 2014; Taylor, 2008). Hyde (2018) has evidence to support that, in addition to senior-level positions, leadership can happen from low-power actors and that these individuals are able to facilitate organisational change. Schön (1963) suggested there was a division between product champions who proposed innovative ideas and management who accepted or rejected them. Similarly, Taylor's (2008) research on environmental champions found two types of champions:

> Project champions act as change agents on a daily basis within organisations or broader institutions, and primarily rely on personal forms of power. In contrast, executive champions are more senior leaders with high levels of position power who allocate resources to innovations and who share some of the associated risks. (p. 2)

Wade and Kallemeyn (2020) also identified where individuals worked differently at different levels. At a senior level, “Evaluation champions were particularly powerful at the board-level,” and in contrast at the staff level, they provided examples of individuals preaching benefits to co-workers

and “laying the groundwork for people to understand the need for evaluation” (Wade & Kallemeyn, 2020, p. 4). Silliman et al.'s (2016a) research found that the actions of evaluation champions mostly connected to changes in individual and project-level practice and not with change at an organisational level. The description in Silliman et al.'s (2016b) research of how participants supported evaluation to be embedded within the organisational system was similar to the project-level participants in this research:

> Evaluation champions collaborated with “top-down” policies (e.g., evidence-based, outcome- focused), practices (e.g., project teams, mentoring), and resources (e.g., tools, experts) but initiated “bottom-up” learning and doing networks to “bridge the gap” or “lead the way” where organizational capacity was limited or lacking. Starting with a belief that “evaluation was everyone’s job” because it was integral to program processes (e.g., action and reflection) and accountability, champions engaged clients, co-workers, and funders in improving programs, appreciating impacts, and learning to evaluate better. (p. 35)

To make the differentiation more explicit, Table 27 shows where evidence existed for project and senior-level participants’ strategies mapped against the components of evaluative inquiry for organisational learning and the elements of cooperative teamwork.

Table 27

Evidence of Evaluative Inquiry by Level

An evaluative inquiry culture (Preskill & Torres, 1999, p. 44)	Alignment with elements of cooperative teamwork	Project-level evidence	Senior-level evidence
A focus on program and organizational processes as well as outcomes	Positive interdependence / Group processing	–	✓
Shared individual, team, and organizational learning	Positive interdependence	✓	✓
Education and training of organizational practitioners in inquiry skills	Individual accountability	–	✓
Modelling the behaviours of collaboration, cooperation, and participation	Social skills	✓	✓
Establishing linkages between learning and performance	Individual accountability	–	✓
Searching for ways to create greater understanding of the variables that affect organizational success and failure	Positive interdependence / Promotive interaction	✓	✓
Using a diversity of perspectives to develop understanding about organizational issues	Social skills	✓	✓

The table above might give the impression that there is a clear-cut differentiation among project-level and senior-level participants. However, the findings from this research indicate there was a progression that moved from critical thinking in relation to evaluation, or evaluative thinking (Buckley et al., 2015), through to developing a culture of evaluative inquiry where individuals and teams are connected to organisational learning (Preskill & Torres, 1999). Läubli Loud (2014) suggests, “Moving evaluative thinking from pockets of individuals and departments to the entire organization is preferable for sustainable, organizational learning and commitment to the principles and ideals of evaluation” (p. 249). Therefore, this statement supports the notion that a culture of

evaluative inquiry may be initiated with individuals thinking evaluatively, providing encouragement, generating enthusiasm, and other interpersonal strategies, and then progressing to more sustainable structural strategies (Garcia-Iriarte et al., 2011). These strategies should not be automatically delineated by high and low hierarchical power as there can be project-level employees "with relatively little formal authority but who nonetheless influence organizational processes and outcomes in ways disproportionate to their official role" (Hyde, 2018, p. 53). Project-level participants exerted influence on other colleagues, which is congruent with the Johnson and Johnson definition of leadership (Johnson & Johnson, 2014a). The project-level participants' way of thinking aligned with Weiss' description of how people collaborate around evaluation:

> Helping program people reflect on their practise, think critically, and ask questions about why the program operates as it does. They learn something of the evaluative cast of mind—the sceptical questioning point of view, the perspective of the reflective practitioner. (Weiss, 1998, p. 25)

Findings from this research appear to be consistent with the concept of needing to engage with individuals in organisations who think evaluatively as a first step until a tipping point is reached and evaluation becomes more firmly embedded (Archibald, Buckley, Urban, & Trochim, 2012).

The literature review of this thesis highlighted a key quotation about the role of an evaluation champion in developing an evaluation culture. Buckley et al. (2015) stated, "If Evaluative Thinking is promoted by an evaluation champion in a position of influence and is increasingly practiced by members of the organization as part of a learning community, an evaluation culture will follow" (p. 384). The finding that the strategies deployed depended on the level of the individual on the organisational hierarchy is supported by this quotation and adds weight to the part of the sentence that states "position of influence" (Buckley et al., 2015, p. 384).

This section of the discussion has analysed why participants were interested in incorporating evaluation – their underlying motivations. It has articulated that participants wanted to make a

difference through their work in their human social service non-profit organisations and that they identified evaluation as a useful tool for making judgements, finding ways to improve, learning, and communicating about their programs. Although all participants aspired towards building a culture of evaluative inquiry, only those participants who moved beyond opportunistic strategies and worked with intent increased the likelihood of their efforts being sustainable beyond their personal involvement. These participants overcame logistical and social psychological barriers to incorporate strategies that aligned with all five elements of cooperative teamwork from social interdependence theory. Thereby, the discussion chapter has so far presented what participants did in practice (activities), how participants worked with colleagues (strategies), and why they were motivated to include evaluation in the first place (motivations). The next section will dive more deeply into understanding the characteristics of participants by examining their attributes with the purpose of understanding more about the features that enabled them to effectively promote evaluation to their co-workers.

Attributes

Examining the characteristics in terms of the attributes of knowledge, skills, and attitudes is useful for investigating underlying patterns and approaches. At the end of each attribute, a table summarises where there was alignment with the sources of literature on champions. The tables include these particular references because they were the main sources incorporated in Chapter 2. In addition, the tables also specifically incorporate references from the literature on policy entrepreneurs and advocates from the social sector, in acknowledgement that *advocate* was a preferable descriptor and that these bodies of literature can help to further understand the characteristics of evaluation advocates.

Knowledge

In this thesis the term *knowledge* is understood to have many meanings, interpretations, and classifications and is used in a broad sense to be about how information is made sense of,

understood, and applied in different contexts (Ottoson, 2009; Powell, 2006). As Chapter 1 detailed, in non-profit organisations staff in general may not value knowledge from research and evaluation as highly as tacit knowledge that has come from experience or from individuals working in their context (Hardwick, 2019; Kelly, 2021; Naccarella et al., 2007; Preskill, 1994; Shaw & Faulkner, 2006). While this sentiment may exist for many individuals working in non-profit organisations, this research intended to specifically understand how people identified as evaluation champions sourced and used knowledge and expertise.

To summarise the findings from Chapter 4, participants in this research were critical thinkers, experiential and lifelong learners, and generalists. Participants sought out expertise and implemented new knowledge in their organisation. They also adapted information and tools for the different audiences they were working with. As such, the way that participants engaged with and applied different sources of knowledge differed from the way many of their peers used knowledge and therefore can be considered a defining attribute.

Identifying, obtaining, creating, clarifying, using, and sharing knowledge is a core component of embedding evaluation within a learning organisation (Cousins et al., 2004; Davidson, 2005; Preskill & Torres, 1998). Learning from the knowledge and information management literature is not new for the field of evaluation, and the literature suggests that theories about knowledge utilization, diffusion, implementation, and transfer can enhance the practice of evaluation (Davison, 2009; Ottoson, 2009; Rogers & Malla, 2019). This body of literature can help examine what participants are doing in practice. Literature is available that draws upon the knowledge fields to understand more about how evaluators can act as knowledge brokers, how the knowledge of individuals can be incorporated into the creation of new knowledge, and how to find appropriate ways of communicating about evaluation and lessons learned (Donnelly & Searle, 2017; Donnelly, Letts, Klinger, & Shulha, 2014; Rogers & Malla, 2019; Wathen, Sibbald, Jack, & MacMillan, 2011). For

example, Archibald, Sharrock, Buckley, and Young (2018) refer to a *knowledge worker* as a person who "uses reflective practice to collaborate, reflect, and make real-time course corrections" (p. 74).

Participants in this research put their communication skills into practice by acting as knowledge workers or brokers among different people within and external to the organisation to promote evaluation use. Evidence from this research illustrated that participants worked in a way that addressed this need identified by Läubli Loud (2016):

> Knowledge generated through evaluations needs to be "translated" into the language of different stakeholder groups and the relevant messages need to be "brokered" and brought to their attention.… In short, the task of translating evaluation results into meaningful messages and getting them to the "right" stakeholder groups should be a recognised mission if evaluation is to help decision makers gain and utilise credible evidence. (p. 27)

Similar ways of using knowledge have been identified across the literature on champions. Silliman et al. (2016a) summarised the organisational change literature related to champions to illustrate how these employees act as learning and innovation catalysts. The three approaches included: "(a) knowledge acquisition (development of skills, insights, relationships), (b) knowledge sharing (dissemination, engagement, collaboration), and (c) knowledge utilization or integration into new situations" (p. 3). Table 28 summarises where similarities exist between the research findings and the extant literature on both champions and policy advocates or entrepreneurs.

Table 28

Key Knowledge Attributes from this Research Mapped to the Literature

Key knowledge attributes from this research	Evaluation champions (Silliman et al., 2016a, pp. 7-13).	Environmental, health, innovation, business champions, and positive organisational scholars (Bateman & Porath, 2003, pp. 122-137; Demes et al., 2020, p. 1; Howell et al., 2005, p. 649; Shea & Belden, 2016, pp. 4–12; Spreitzer & Sonenshein, 2003, pp. 207-224; Taylor, 2010, p. 72).	Policy advocates/ entrepreneurs (Mintrom, 2019, pp. 312-313).	Advocates: Social work, mental health, counselling (ACA, 2018, pp. 5-10; Paladino et al., 2011, p. 12; Wiede, 2011, pp. 18, 39, 53).
Experiential learner, lifelong learner.	In the process of improving how they practiced evaluation, champions developed a greater understanding. Skill practice was self-taught, trial-and-error, and punctuated by peer learning or working with an expert or mentor.	Openness to experience. Encourage learning. Rationality and mindfulness both employ the skills, abilities, and practices that overcome inhibitory biases and provide fuller and more proper use of information.	When gaps in evidence and data serve to weaken a preferred position, it is incumbent on the policy entrepreneur to consider ways that new evidence or data can be found.	A need for real world understanding of the practical, political mechanisms involved in decision making and funding.
Someone who seeks out expertise and implements new knowledge.	Evaluative thinking was evident in questions such as, 'Which method fits what we want to know about this program?' Mentored by or worked closely with evaluation specialists.	Innovative. Accurately reading institutional landscapes (including politics and social networks). Gets problems into the hands of those who can solve them. Knowing oneself and the limits of one's own knowledge. Personal efficacy.	Adept at collecting evidence and using it strategically to support their quest.	Advocates named policy and systems, legislation and legislators, resources, self-knowledge or awareness and research and writing as most necessary to successful advocacy work. Connecting with outside systems—collaboration. Specific alliances—backdoor approaches. Identify potential allies for confronting the barriers.

Key knowledge attributes from this research	Evaluation champions (Silliman et al., 2016a, pp. 7-13).	Environmental, health, innovation, and business champions (Bateman & Porath, 2003, pp. 122-137; Demes et al., 2020, p. 1; Howell et al., 2005, p. 649; Shea & Belden, 2016, pp. 4–12; Spreitzer & Sonenshein, 2003, pp. 207-224; Taylor, 2010, p. 72).	Policy advocates/ entrepreneurs (Mintrom, 2019, pp. 312-313).	Advocates: Social work, mental health, counselling (ACA, 2018, pp. 5-10; Paladino et al., 2011, p. 12; Wiede, 2011, pp. 18, 39, 53).
Critical thinker.	Evaluative thinking as an extension of their personality, training, and/or programming experience. Rigorous thinking and management.	Questioning the status quo.	The art of evidence collection is to establish a rigorous, defensible base of data to support a given position and to present it and discuss it in ways that most effectively draw others to the cause.	Self-awareness is also essential in ensuring the advocacy effort is not about the advocate but about the people they serve. Recognize the significance of counselor's own cultural background and sociopolitical position.
Generalist.	Seeking professional development resources. Self-directed learning.	Excellent strategic and relational knowledge of the institutional environment. Good general knowledge of methods.	Having a large and growing 'toolbox' of policy solutions that could be applied to address specific problems	Beyond knowledge of resources, advocates must have knowledge of parameters, advocacy models, and systems changes.
Adapter of information and tools for different audiences.	Mastered existing evaluation tools. Searched for and utilized existing instruments. Interpreting the value of and opportunities for evaluation.	Analysing information. Using a wide variety of influence tactics to suit the context. Brokering knowledge.	We need to tell the same story in different ways. Doing so means emphasizing different points to different audiences while maintaining a consistent broader message.	Used knowledge of systems to advocate for others within the system. Sharing resources and information. Share resources and tools.

Skills

In this thesis *skills* refer to an ability that comes from knowledge, practice, or aptitude, meaning that the specific competence can be learned or acquired (Macquarie Dictionary, 2016). This chapter has previously discussed that participants and the associated evaluators did not think that they had technical evaluation skills to impart to their co-workers. When the activities were listed regarding what participants did in practice, the skill set was focused on motivating colleagues and advocacy. When examples of their strategies were aligned with the activities, there was strong evidence for finding shared goals, providing encouragement, and using their social skills to create an inclusive working environment. The analysis of the participants' skill sets presented here, and considered in relation to the extant literature, consistently reinforces the earlier findings.

Participants' skill sets were primarily focused on supporting, encouraging, and promoting evaluation to colleagues. These skills can be aligned with the promotive interaction element of cooperative teamwork as discussed earlier. They also listened, communicated effectively, and developed rapport by being respectful, humble, empathetic, and inclusive. These skills can all be aligned with the social skills element of cooperative teamwork as also previously outlined. Participants also used their networks to find the means to source the expertise required and demonstrated their commitment by modelling the desired behaviour. To summarise these skills, interpersonal connections are strongly emphasised; forming positive meaningful working relationships was the overarching theme of this skill set.

The literature on champions references the need to find the right balance between technical skills and more general skills. In contrast to participants in this research, participants in Silliman et al.'s (2016a, 2016b) research were interested in developing technical evaluation skills. They requested training ranging from basic knowledge and skills, through to data analysis, interpretation, and reporting. Their identified training needs indicated their willingness to become proficient across

all the evaluation competencies (Silliman et al., 2016b, p. 34). For environmental champions, Taylor (2008) mentions the importance of both technical and general social skills:

> A good general knowledge of the water industry and associated technology; advanced skills at exercising influence (e.g. via strong communication skills); power through their social networks, expert knowledge and credibility amongst colleagues; and key leadership behaviours, such as identifying influence opportunities, choosing the right influence tactics for the right target and time, executing a variety of such tactics, developing and encouraging colleagues, and undertaking advanced forms of social networking. (p. 2)

By contrast, participants in this research reportedly placed their skill set more towards the general skills and were less inclined than the champions from the literature to claim that they had technical skills. However, in regards to the general skills there were many consistent findings among participants and the references in the literature. Table 29 summarises where similarities exist between the research findings and the extant literature on both champions and policy advocates or entrepreneurs.

Table 29

Key Skills Attributes from this Research Mapped to the Literature

Key skills attributes from this research	Evaluation champions (Silliman et al., 2016a, pp. 7-13).	Environmental, health, innovation, business champions, and positive organisational scholars (Bateman & Porath, 2003, pp. 122-137; Demes et al., 2020, p. 1; Howell et al., 2005, p. 649; Shea & Belden, 2016, pp. 4–12; Spreitzer & Sonenshein, 2003, pp. 207-224; Taylor, 2010, p. 72).	Policy entrepreneurs (Mintrom, 2019, pp. 312-313).	Advocates: Social work, mental health, counselling (ACA, 2018, pp. 5-10; Paladino et al., 2011, p. 12; Wiede, 2011, pp. 18, 39, 53).
Supports, encourages, and promotes evaluation to colleagues.	Vocal "cheerleaders." Practice emphasis incorporated thinking, initiating, measuring, and using data to add value to peers' or clients' learning. Mentoring and training. Assistance or long-term mentoring.	Transformational leadership skills. Providing inspiration and motivation to colleagues. Coordinating distributed leadership within groups. Continues to be involved with the innovation until it is implemented. Uses friendliness and ingratiation. Persuasiveness. Applying sanctions. Horizontal and collective leadership style. Ability to inspire and motivate people.	The key is to look for ways to make positive impacts salient and find ways to reduce negative impacts or mitigate them by offering additional benefits that tend to compensate for any losses.	Looking at, identifying, and celebrating strengths. Empowering your clients.

Key skills attributes from this research	Evaluation champions (Silliman et al., 2016a, pp. 7-13).	Environmental, health, innovation, business champions, and positive organisational scholars (Bateman & Porath, 2003, pp. 122-137; Demes et al., 2020, p. 1; Howell et al., 2005, p. 649; Shea & Belden, 2016, pp. 4–12; Spreitzer & Sonenshein, 2003, pp. 207-224; Taylor, 2010, p. 72).	Policy entrepreneurs (Mintrom, 2019, pp. 312-313).	Advocates: Social work, mental health, counselling (ACA, 2018, pp. 5-10; Paladino et al., 2011, p. 12; Wiede, 2011, pp. 18, 39, 53).
Uses networks.	Engaging campus experts, community partners, and funders, and by working in project teams.	Identifying influence opportunities. Building and sustaining social networks and coalitions of support. Gathering political and managerial support. Gets the right people involved. Gets key decision makers involved. Building coalitions. Appealing to higher authority. Organizational citizenship behaviors, will lead to greater centrality in organizational networks, with its attendant benefits (information, knowledge), as well as to trust, reciprocity, and cooperation.	Using and expanding networks. Policy entrepreneurs who get along well with others and who are well connected in their local policy contexts are more likely to achieve their policy goals. Anyone seeking to have influence in policymaking must develop excellent awareness of the nature of the policy networks operating around them and determine effective ways to participate in them.	Collaboration was at the center of productive engagement. Building individual relationships as well as community relationships is essential to creating an effective advocacy network. Networking (technology, social networking sites).

Key skills attributes from this research	Evaluation champions (Silliman et al., 2016a, pp. 7-13).	Environmental, health, innovation, business champions, and positive organisational scholars (Bateman & Porath, 2003, pp. 122-137; Demes et al., 2020, p. 1; Howell et al., 2005, p. 649; Shea & Belden, 2016, pp. 4–12; Spreitzer & Sonenshein, 2003, pp. 207-224; Taylor, 2010, p. 72).	Policy entrepreneurs (Mintrom, 2019, pp. 312-313).	Advocates: Social work, mental health, counselling (ACA, 2018, pp. 5-10; Paladino et al., 2011, p. 12; Wiede, 2011, pp. 18, 39, 53).
Listens and communicates effectively.	"Personal factor" for peers.	Communicating clearly and frequently. Facilitating and negotiating. Using scanning and framing behaviours. Presenting rational arguments. Persuasiveness. Communication and persuasion.	Carefully reflecting on the nature of the content and mode of delivery that will be most effective in making the desired connection with each specific audience.	Communication skills are at the core of essential advocacy competencies; listening and verbal. Maintain open dialogue.
Models desired behaviour.	Talk about evaluation and more frequent actions as monitors, models, and mentors.	Aligning resources with this vision. Establishing pilot projects. Selecting the most appropriate set, sequence, and timing of influence tactics to suit the context. Expresses confidence in what the innovation can do. Engaging in workflow redesign. Assertiveness.	Leading by example. Developing effective ways to work with others and reduce the barriers to others supporting your proposals. Any knowledge and experience that can help policy entrepreneurs to effectively structure negotiations and work through them will serve them well as they pursue their policy goals.	Modelling self-advocacy strategies. Advocating for other services. Assist students and clients in carrying out action plans.

Key skills attributes from this research	Evaluation champions (Silliman et al., 2016a, pp. 7-13).	Environmental, health, innovation, business champions, and positive organisational scholars (Bateman & Porath, 2003, pp. 122-137; Demes et al., 2020, p. 1; Howell et al., 2005, p. 649; Shea & Belden, 2016, pp. 4–12; Spreitzer & Sonenshein, 2003, pp. 207-224; Taylor, 2010, p. 72).	Policy entrepreneurs (Mintrom, 2019, pp. 312-313).	Advocates: Social work, mental health, counselling (ACA, 2018, pp. 5-10; Paladino et al., 2011, p. 12; Wiede, 2011, pp. 18, 39, 53).
Develops rapport by showing respect and by being empathetic and inclusive.		Seeing an issue from many perspectives. Resolving conflict. Individualized consideration. Humility. Empathy. Being other-focused enhances interpersonal facilitation, including cooperative helping behaviours and human social capital.	They understand the ideas, motives, and concerns of the people whose support they must garner.	The ability to achieve collaboration also requires the ability to establish solid relationships. Compassion/empathy. Understanding the client‘s culture. Gaining trust and respect of the client.

Attitudes

Attitudes is the third area of characteristics that this section discusses to consider the underlying factors that enabled participants to promote evaluation. If *knowledge* focused on how participants used information and *skills* considered attributes that could be learned or acquired, *attitudes* focus on the underlying personal dispositions, manners, and positions that an individual might hold towards the topic of evaluation (Macquarie Dictionary, 2016). This segment presents an analysis of the participants' attitudes and discusses them in relation to the extant literature.

Summarising the findings from Chapter 4 and 5 in respect to attitudes, participants self-reported that their manner towards evaluation was positive, persistent, tenacious, resilient, and patient. Supported by evidence from evaluators and colleagues, participants were self-motivated, versatile, enthusiastic, and passionate. They were curious, open to change and challenges, inquisitive, and willing to take risks and make mistakes. Participants were visionary and willing to drive the process.

These findings resonate strongly with the extant literature. For example, this quotation from Howell (2005) could equally be applied to participants in the current research: "Champions are individuals who informally emerge to promote the idea with conviction, persistence, and energy, and willingly risk their position and reputation to ensure the innovation's success" (p. 108). Taylor (2010) also found in his research that looked at environmental champions that motivation, determination, openness to experience, high focus on communication, high to very high levels of enthusiasm, agreeableness, and confidence were commonly distinguishing personality characteristics. Table 30 summarises the attitudes that were emphasised in the literature relating to champions, and policy advocates or entrepreneurs.

Table 30

Key Attitude Attributes from this Research Mapped to the Literature

Key attitude attributes from this research	Evaluation champions (Silliman et al., 2016a, pp. 7-13).	Environmental, health, innovation, business champions and positive organisational scholarship (Bateman & Porath, 2003, pp. 122-137; Demes et al., 2020, p. 1; Howell et al., 2005, p. 649; Shea & Belden, 2016, pp. 4–12; Spreitzer & Sonenshein, 2003, pp. 207-224; Taylor, 2010, p. 72).	Policy entrepreneurs (Mintrom, 2019, pp. 312-313).	Advocates: Social work, mental health, counselling (ACA, 2018, pp. 5-10; Paladino et al., 2011, p. 12; Wiede, 2011, pp. 18, 39, 53).
Positive.		Shows optimism about the success of the innovation.		Optimism. A positive outlook in the form of believing change is possible. Looking at, identifying, and celebrating strengths. Identify strengths and resources of clients and students.
Persistent, tenacious, resilient, patient.	Persistence.	Persistence, commitment, and focus. Persevering despite opposition. Expresses strong conviction about the innovation. Shows tenacity in overcoming obstacles. Persists in the face of adversity. Knocks down barriers to the innovation. Dedication. Generating alternative backup strategies if needed.	Must be tenacious - Tenacity is the willingness to keep working towards a bigger goal, even when that goal seems nowhere in sight.	Perseverance/ patience

Key attitude attributes from this research	Evaluation champions (Silliman et al., 2016a, pp. 7-13).	Environmental, health, innovation, business champions and positive organisational scholarship (Bateman & Porath, 2003, pp. 122-137; Demes et al., 2020, p. 1; Howell et al., 2005, p. 649; Shea & Belden, 2016, pp. 4–12; Spreitzer & Sonenshein, 2003, pp. 207-224; Taylor, 2010, p. 72).	Policy entrepreneurs (Mintrom, 2019, pp. 312-313).	Advocates: Social work, mental health, counselling (ACA, 2018, pp. 5-10; Paladino et al., 2011, p. 12; Wiede, 2011, pp. 18, 39, 53).
Self-motivated, versatile.	Self-motivated. Motivation was self-generated.	Motivation. Determination. Self-determination.	Defined by their willingness to invest various resources in the hope of a future return.	Motivation
Enthusiastic, passionate.	Passion for evaluative thinking and making a difference with people. Enthusiasm.	Enthusiasm and energy. Propensity to engage in extra-role behaviours. Enthusiastically promotes the innovation's advantages. Enthusiasm. Charisma.	The energy and commitment they display in pursuit of a cause enhance their credibility.	Passion. Likeability.
Curious, open to change and challenges, asks questions.		Questioning the status quo. Intellectually stimulating other organizational members.		
Willing to take risks and make mistakes.		Risk-taking and tolerance to uncertainty. Does not give up when others say it cannot be done. Innovativeness. Overcoming technical Challenges. Risk-tolerance. Go-ahead type. Courage is a willingness to confront risk to do what one thinks is right.		Risk-taking. Taking the risk to be an advocate.

Key attitude attributes from this research	Evaluation champions (Silliman et al., 2016a, pp. 7-13).	Environmental, health, innovation, business champions and positive organisational scholarship (Bateman & Porath, 2003, pp. 122-137; Demes et al., 2020, p. 1; Howell et al., 2005, p. 649; Shea & Belden, 2016, pp. 4–12; Spreitzer & Sonenshein, 2003, pp. 207-224; Taylor, 2010, p. 72).	Policy entrepreneurs (Mintrom, 2019, pp. 312-313).	Advocates: Social work, mental health, counselling (ACA, 2018, pp. 5-10; Paladino et al., 2011, p. 12; Wiede, 2011, pp. 18, 39, 53).
Visionary.	Engage and educate target audiences, staff, and funders about a program's purpose, potential, and impact. Viewing the extra efforts or setbacks of each project in a long-term perspective.	Vision and a strategic perspective. Accurately reading institutional landscapes. Points out reasons why the innovation will succeed. Have a vision.	They often help others to see how their specific actions can contribute to the bigger vision for policy change. Strategic thinking.	Insight.
Willing to drive the process.	Leading needs assessment, planning, monitoring, and reporting activities.	Keeps pushing enthusiastically. Sticks with it. Assertive actions. Achievement. Proactivity. Structuring and weighing life goals, handling life conflicts and life decisions.	Ambition. Conveying the significance of a change effort can assist policy entrepreneurs as they seek to maintain the focus and commitment of those working with them.	

The chapter has so far listed participants' activities and their alignment with the elements of cooperative teamwork, documented strategies, and discussed why they were interested in evaluation. This section has examined attributes in relation to the participants' knowledge, skills, and attitudes. The investigation uncovered some of the features that enabled participants to effectively engage with others around evaluation by drawing together the findings from this research with the literature on the attributes of champions, policy entrepreneurs, and advocates. The final section of the discussion develops a revised definition and field guide.

Revised definition and field guide

To summarise, in this research participants motivated others and provided energy, interest, and enthusiasm around evaluation. Finding shared goals was the predominant strategy they used to increase uptake, but by developing meaningful interpersonal relationships, they also provided encouragement and incorporated the individual skills, interests, and perspectives of co-workers to support evaluation initiatives. Participants were interested in evaluation because they wanted judgements about the effectiveness of their work and were working towards developing a culture of evaluative inquiry. To increase the likelihood of embedding evaluation within the organisational system in a sustainable manner, some participants worked with intent and combined strategies that aligned with all five elements of cooperative teamwork from social interdependence theory. This section will now collate these key points along with sources from the literature to develop a revised definition and field guide for evaluation advocates.

The literature review proposed a definition of an evaluation champion as "an employee who practises reflection and critical thinking, and promotes evaluation among colleagues" (Rogers & Gullickson, 2018, p. 55). However, this thesis argues that the label of evaluation champion undermined participants' efforts to develop mutually beneficial interactions and cooperative working relationships. The research proposes a revised definition that defines these individuals as evaluation advocates. It argues that *evaluation advocate* is more appropriate and acceptable*;* the

label does not draw unwanted attention, does not allude to any claims about specific technical evaluation skills, and avoids placing responsibility for evaluation upon the shoulders of an individual.

As discussed earlier, the definition of an advocate that most accurately relates to participants in this research is "someone who defends, vindicates, or espouses a cause by argument; an upholder; a defender" (Macquarie Dictionary, 2016, para. 1). While this definition is relatively straightforward and self-explanatory, many different definitions of advocates across different sectors exist because of the different levels of advocacy and the multi-faceted nature of reasons for being an advocate (Freddolino et al., 2004; Wiede, 2011). However, to overcome the lack of clarity, this thesis has drawn upon a definition of a policy entrepreneur, a definition of a social work advocate, and the definition of evaluation champion from Silliman et al.'s (2016a) research, along with the proposed definition from Chapter 2, to develop a revised definition of an evaluation advocate.

Policy entrepreneurs have been defined as:

> Energetic actors who engage in collaborative efforts in and around government to promote policy innovations.... Involves various strategies, including (1) problem framing, (2) using and expanding networks, (3) working with advocacy coalitions, (4) leading by example, and (5) scaling up change processes. (Mintrom, 2019, p. 307)

Definitions of social work advocates include the following themes: "Championing the rights of others, defending others from abuse or dehumanizing circumstances, overcoming bureaucratic barriers to service or entitlements, and facilitating access to resources or opportunities" (Freddolino et al., 2004, p. 120). To restate, evaluation champions were defined by Silliman et al. (2016a) as "individuals who serve as catalysts for building evaluation capacity within an organization. They advocate for the importance of program evaluation, model good evaluation behaviors, and mentor their peers in program evaluation skills and competencies" (p. 1).

Table 31 is an extension of the definition developed in Chapter 2 and published in the Rogers and Gullickson (2018) journal article. It divides the published definition into smaller components, activities (what they did in practice), "Practices reflection and critical thinking," and strategies (how they worked), "Promotes evaluation among colleagues" (Rogers & Gullickson, 2018, p. 55), and draws upon the literature to find evidence for attributes (inherent features), and motivations (why they were interested in evaluation). The table maps the relevant definitions from the literature outline above, alongside the findings from this research to develop a revised definition of an evaluation advocate. Using this table as a basis, the revised definition replaces *Practices reflection and critical thinking* and *Promotes evaluation among colleagues* from the proposed definition, with the primary activity derived from this research of *Motivate others and provide energy, interest, and enthusiasm* and the primary strategy of *Connecting evaluation with colleagues' personal aspirations and the organisational goals*. Including the word *personal* is in recognition of how the participants understood their co-workers as individuals and created intentional one-on-one relationships to discover what motivated each individual. The other change from the definition proposed in the literature review was to substitute *employees* with *individuals* in acknowledgment that, particularly in the non-profit sector, evaluation advocates can be volunteers or board members. The prominent activity from this research, *Advocate for support and resources* was not included because the label *evaluation advocate* captures the activity. The attributes mentioned in the other definitions focused more on the features that enabled evaluation advocates to undertake the strategies and activities and were therefore too specific for inclusion in the definition.

Table 31

Revised Definition Components

Component of definition	Proposed definition (Rogers & Gullickson, 2018, p. 55).	Evaluation champion (Silliman et al., 2016a, p. 1).	Policy entrepreneur (Mintrom, 2019, p. 307).	Social worker advocate (Freddolino et al., 2004, p. 120).	Evidence from findings	Revised definition
Activity: What they do.	Practices reflection and critical thinking.	Serves as catalysts for building evaluation capacity within an organization.	Engages in collaborative efforts in and around government to promote policy innovations. Problem framing.	Champions the rights of others, defending others from abuse or dehumanizing circumstances.	Motivates others and provides energy, interest, and enthusiasm.	**Motivates others and provides energy, interest, and enthusiasm.**
Strategies: How they worked.	Promotes evaluation among colleagues.	Mentors their peers in program evaluation skills and competencies.	Scales up change processes.	Overcomes bureaucratic barriers to service or entitlements.	Connects evaluation with colleagues' personal aspirations and the organisational goals.	**Connects evaluation with colleagues' personal aspirations and the organisational goals.**
		Advocates for the importance of program evaluation.	Works with advocacy coalitions.		Advocates for support and resources.	*Not included as recognised in label.*
Attributes: Inherent features.		Models good evaluation behaviours.	Leads by example.		Skill: Models desired behaviour.	*Not included in definition as too specific, but included in the field guide.*
			Uses and expands networks.	Facilitates access to resources or opportunities.	Skill: Uses networks.	
Motivations: Why participants were interested in evaluation.					To make judgements about effectiveness.	**To make judgements about effectiveness.**

The revised definition is therefore based on three components: what participants did in practice, how they achieved this, and why they were motivated to include evaluation. This thesis defines an evaluation advocate as "an individual who motivates others and provides energy, interest, and enthusiasm by connecting evaluation with colleagues' personal aspirations and the organisational goals to make judgements about effectiveness." The original contribution to knowledge is this revised definition and a practical field guide for evaluation advocates to facilitate identification, recruitment, support, and development. The field guide is comprised of a statement about the underlying motivations for why evaluation is of interest, a summary of activities (what they do), a list of strategies (how they do it), and the underlying attributes, knowledge, skills, and attitudes to articulate their enabling features. The activities are in the reprioritised order to reflect the level of support by participants. The five strategies are prominent examples drawn directly from the tables with each one representing an element of cooperative teamwork; these are a reminder that, in accordance with social interdependence theory, to effectively structure cooperative teamwork all elements need to be intentionally incorporated. The attributes are a summary of some of the critical knowledge, skills, and attitudes documented in the findings. Table 32 presents the definition and field guide.

Table 32

A Definition and Field Guide for Evaluation Advocates: Who, Why, What, and How

<table>
<tr><td colspan="3">Evaluation advocate: An individual who motivates others and provides energy, interest, and enthusiasm by connecting evaluation with colleagues' personal aspirations and the organisational goals to make judgements about effectiveness.</td></tr>
<tr><td colspan="3">Why they do it: Advocates look for systematic approaches to analyse evidence and make judgements about the effectiveness of their work.</td></tr>
<tr><td>What they do:</td><td>How they do it:</td><td>Attributes:</td></tr>
<tr><td rowspan="2">Activities
- Motivate others and provide energy, interest, and enthusiasm
- Consider how evaluation can be strategically promoted and used for organisational change
- Assist, train, mentor, support evaluation while considering different perspectives, and encouraging others to contribute
- Advocate for support and resources
- Ask and encourage others to ask critical questions and initiate discussions and debates
- Develop engaging ways to explain details and develop common visions
- Help others to apply evaluative thinking, use evaluation findings, and create opportunities for reflection
- Provide or access tools, resources, networks, and expertise</td><td rowspan="2">Strategies
- Cultivate relationships and use personal connections to clarify the purpose of the interaction and make relevant for that individual.
- Start small and find simple and quick tangible wins by finding the projects and people that are ready to use evaluation
- Use analogies, metaphors, or simple explanations that connect short-term tasks with a long-term, big-picture perspective regarding the benefits of evaluation
- Provide training, instruction manuals, short guides, peer support mechanisms, and incorporate accountability into work plans
- Incorporate evaluative questions in routine meetings and general conversations to normalise making judgements and reflecting upon the teamwork dynamics</td><td>Knowledge
- Experiential lifelong learners
- Someone who seeks out expertise and implements new knowledge
- Critical thinker
- Generalist
- Adapter of information and tools for different audiences</td></tr>
<tr><td>Skills
- Supports, encourages, and promotes evaluation to colleagues
- Uses networks
- Listens and communicates effectively
- Models desired behaviour
Attitudes
- Positive
- Persistent, tenacious, resilient, patient
- Self-motivated, versatile
- Enthusiastic, passionate
- Curious, open to change and challenges, asks questions
- Willing to take risks and make mistakes
- Visionary
- Willing to drive the process</td></tr>
</table>

The field guide is not exhaustive as it essentially provides a sample of possible activities and strategies. Likewise, an individual may not need to do everything listed to consider themselves an evaluation advocate. The examples presented above may be of value for helping them to recognise their important contribution. Often working in an invisible way, some of these quite intangible

characteristics are difficult to articulate. Many advocates may not realise the full extent of their contribution until they see these characteristics presented in a way that defines their package of skills more holistically. Just as participants reacted positively to reviewing the activities listed in the proposed definition from Chapter 2, the field guide that includes strategies and attributes may also be useful for evaluation advocates. It could potentially assist with self-identification and self-assessment as individuals could reflect on their own personal strengths and weaknesses. This table could also complement existing professional development resources (Mintrom, 2019; Silliman et al., 2016b; Warrick, 2009) and enable evaluators and decision makers in organisations to identify, recruit, retain, and support advocates.

Summary

This research initially developed a definition to help identify an evaluation champion, and this discussion chapter opened with an examination of this definition in relation to what participants did in practice by drawing upon the theory of social interdependence. The theory assisted with understanding the dynamics in cooperative and competitive work environments and helped analyse why the label *evaluation champion* was inappropriate. The chapter discussed why using the label *evaluation advocate* may help avoid negative repercussions.

To delve deeper than just being able to identify these individuals, a major component of the chapter focused on examining how participants worked. It mapped their activities and strategies to the elements of cooperative teamwork. The chapter presented evidence to indicate participants effectively found shared goals, provided encouragement, and included diverse perspectives to strengthen the positive outcomes by developing meaningful interpersonal relationships. Their strategies aligned with the positive interdependence, promotive interaction, and social skills elements of cooperative teamwork.

The chapter continued with a discussion about the participants' underlying motivations for engaging with evaluation. Participants wanted to include evaluation because they wanted answers

to *so what* questions and they valued evaluative thinking and logic. They wanted to make a difference through their work, sought constructive judgement about the effectiveness of their work to learn and improve, and wanted to use evaluative information for multiple purposes. This research found that participants were successfully contributing to building cultures of evaluative inquiry by making evaluation appealing to co-workers. There were some participants who effectively structured cooperative teamwork around evaluation by working with intent and combining strategies that aligned with all five elements of cooperative teamwork. This increased the likelihood of them being able to embed evaluation in a sustainable manner.

The final sections of this chapter summarised the attributes that facilitated participants' effective influence on their colleagues and presented the findings in relation to the extant literature. The chapter concluded by compiling the key discussion components into a revised definition and practical field guide that evaluation advocates, evaluators, and decision makers can use for identification, recruitment, retainment, and development. The following final chapter concludes the thesis by presenting the implications, sharing recommendations, and highlighting areas for future research.

CHAPTER 7 – CONCLUSION

This research contributes to the knowledge base of evaluation by providing information and analysis about individuals who champion and advocate for evaluation in their organisations, who prefer to be known as *evaluation advocates*. It initially proposed a definition of an evaluation champion based on the literature, but ultimately provided a revised definition and a field guide for evaluation advocates, by collating their activities, compiling the interpersonal strategies they used to promote evaluation, and examining their underlying motivations and attributes. The results of this research can be used to identify, understand, support, develop, and encourage these individuals to increase the uptake of evaluation in organisations. It may be also useful for those attempting to promote evaluation to non-evaluators as it examined an influential phenomenon that helped to deliver positive outcomes and identified strategies that create the conditions for sustainability. In addition, using evaluation as the conduit and drawing upon social interdependence theory, this research also contributes to understanding how to effectively structure cooperative teamwork to achieve common goals in increasingly competitive organisational environments.

Chapters 1 and 2 in this thesis initially justified why evaluation champions might offer a solution to helping organisations increase the uptake of evaluation by collating evidence from the literature. Chapter 3 documented how data were collected and analysed. Chapters 4 and 5 shared how participants, working in the challenging context of non-profit organisations, effectively engaged with their colleagues and increased the uptake of evaluation to support the achievement of organisational goals. These chapters examined the activities, strategies, motivations, and attributes of participants with Chapter 5 focusing on the perspectives of the evaluators and colleagues who worked alongside them. Chapter 6 combined the findings from this research with the literature and theory to argue that the label of *evaluation advocate* is more conducive for developing mutually beneficial interactions and cooperative working relationships. The chapter culminated in a revised definition and a field guide for an evaluation advocate.

The purpose of this final chapter is to demonstrate how having an increased understanding of evaluation advocates may contribute to the body of knowledge that is exploring ways to increase the uptake of evaluation. It begins by answering each research question. It describes the value and limitations of this research, outlines three recommendations, makes two suggestions for future research, and then provides a concluding statement.

Answering the research questions

What are the characteristics of evaluation champions working in non-profit organisations?

To answer this question, this thesis examined the social processes of individuals championing evaluation working in non-profit organisations, investigating their activities, strategies, motivations, and attributes. After examining the participants' characteristics in terms of their attributes of knowledge, skills, and attitudes, I deduced that participants were experiential lifelong learners; they supported, encouraged, and promoted evaluation to others; and they were positive, persistent, tenacious, resilient, and patient. Consequently, due to their cooperative style of working and orientation to cultivating and maintaining mutually beneficial interpersonal relationships, this research found that participants did not want to be called *evaluation champions.*

Participants suggested that it would not be useful to be singled out as champions when they were trying to promote a cooperative team environment as opposed to a competitive workplace. The theory of social interdependence assisted with understanding why it was important for participants trying to develop mutually beneficial cooperative goals around evaluation to avoid any signs of competition or negative interdependence. This was pertinent in the non-profit sector where anxiety and resistance to evaluation may be higher than in other sectors, but it would also be a consideration in any setting where there is a desire to develop cooperative team environments around evaluation where everyone can contribute. Therefore, the findings from this research re-define and re-label *evaluation champions* as *evaluation advocates* who motivate others and provide energy, interest, and enthusiasm by connecting evaluation with colleagues' personal aspirations and

the organisational goals to make judgements about effectiveness. The original contribution to knowledge is a revised definition and a field guide for evaluation advocates to facilitate identification, recruitment, support, and development (Table 32).

What motivates champions to include evaluation in their everyday practice?

Participants were motivated to include evaluation because they wanted answers to *so what* questions, valued evaluation logic and evaluative thinking, and were looking for judgements about the effectiveness of their work. Participants also wanted to use evaluation for multiple purposes; they prioritised use and were well-positioned to use evaluation to provide different audiences with the information they needed.

Understanding this motivation, evaluation advocates could use this research to recognise that at any level of the organisational hierarchy they can promote use and be influential. Similarly, evaluators could extend their engagement beyond senior-level staff and recognise the value of advocates from across the organisation to support their efforts to use evaluation over the long-term. Participants understood that this might take a long time and that several interconnecting factors would need to combine before colleagues engage meaningfully with evaluation, but often they were in the right position to see this come to fruition.

In what ways, and with whom, do champions promote evaluation?

Linked to the cooperative teamwork elements of positive interdependence and promotive interaction, the two main ways participants promoted evaluation among their colleagues were by providing encouragement and finding shared goals so peers could see how evaluation could benefit their work. Underpinning these two approaches in a non-profit context was the strategy of including as many people with different worldviews as possible in all aspects of the evaluation. Participants were skilled in developing positive interpersonal relationships, understanding their co-workers as individuals, and developing equitable and inclusive working environments.

These findings contribute to filling a gap in knowledge regarding strategies around promoting evaluation that may be useful for evaluation advocates, evaluators, and decision makers (Tables 22 - 26). Although many of the strategies for building relationships, understanding the individual determinants, and exploring the underlying value systems of colleagues take considerable amounts of time and energy, they may be worthwhile. Participants reported that time allocated to understanding the needs, strengths, values, and knowledge systems of their peers was worth the effort to ensure they could find an alignment with evaluation. This way of working favours long-term working relationships that are based on trust and reciprocal engagements. If the process is rushed, time bound, or not based on a positive interpersonal dynamic, then significant barriers may prevent the interaction from being mutually beneficial.

In what ways, and to what extent, do champions support evaluation to be embedded within the organisational system?

To varying degrees, all participants sought to make evaluation meaningful and relevant for their colleagues and were working to develop a culture of evaluative inquiry. However, participants' level on the hierarchy and degree of influence determined the extent to which they could embed evaluation in routine operations. Participants in low hierarchical positions used opportunistic strategies that aligned with the positive interdependence, promotive interaction, and social skills elements of cooperative teamwork. Participants who had a higher degree of hierarchical and influential power supported structural changes, intentionally introduced the processes and systems to support evaluation to become routine, developed capacity, and further contributed to building a culture of evaluative inquiry. These strategies aligned with the other two elements of cooperative teamwork: individual accountability and group processing.

Hence, participants high on the organisational hierarchy or those who had influence over people in senior-level positions could use planned and intentional strategies that aligned to all five elements of cooperative teamwork and thereby increase the likelihood of making their efforts

sustainable; their strategies increase understanding about how to effectively structure cooperative team work around evaluation. This finding may contribute to the body of knowledge related to the theory of social interdependence. The strategies identified may also be useful for advocates at any level to extend their influence and increase the likelihood of evaluation being embedded in a sustainable way. The examples provided in this thesis (Tables 22 - 26) may contribute ideas for how advocates at any level of the hierarchy can take a more intentional approach to promoting evaluation by drawing upon the elements of cooperative teamwork from social interdependence theory to structure interpersonal interactions more effectively.

In summary, this research increases understanding about people who convince others about the value of evaluation. This contribution may assist with reducing the barriers to uptake and help non-evaluators see the benefits of using evaluation as a tool to advance the work of their organisations. Beyond evaluation advocates, this research may be useful for understanding how to effectively structure cooperative teamwork to achieve common goals in increasingly competitive organisational environments.

Figure 17 provides a representation of social interdependence theory, with specific reference to the elements of cooperative teamwork. It illustrates that the underlying way participants in this research convinced their colleagues to do something they did not necessarily want to do was by creating positive interdependence and avoiding negative interdependence. Table 33 follows the diagram and provides a succinct summary of the answers to the original research questions.

Figure 17

Results Framework

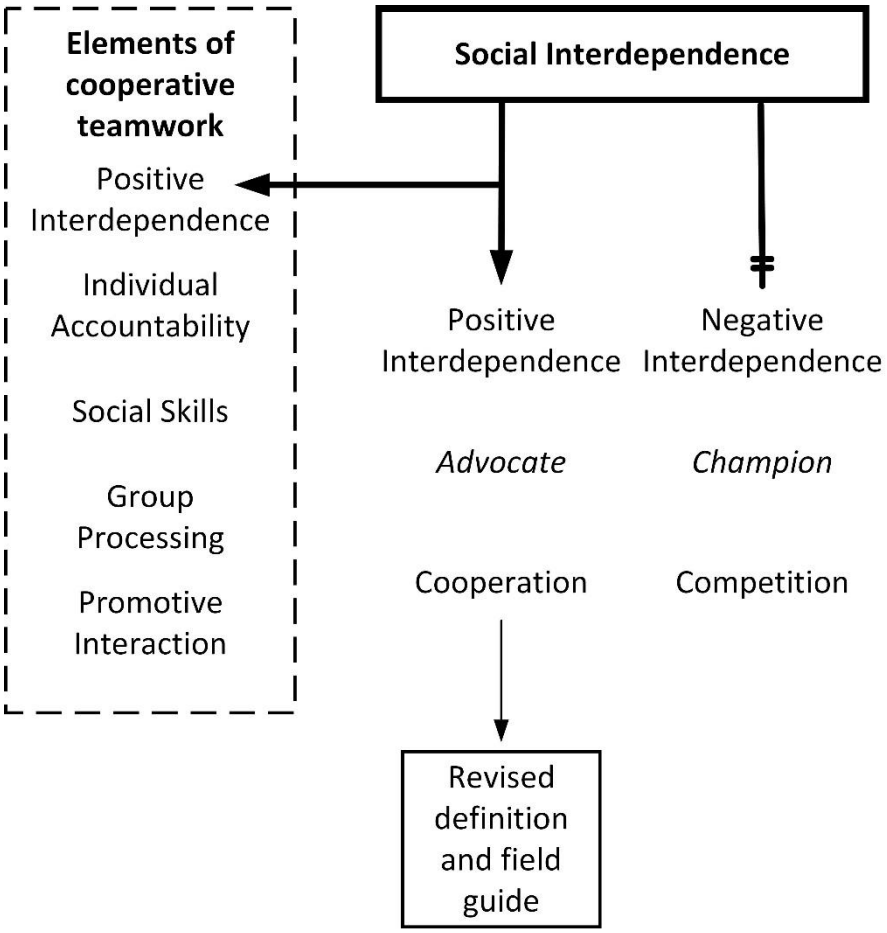


Table 33

Summary of Findings Against Research Questions

Question asked:	Findings:	Contribution:	The importance and to whom:	Recommendations:
What are the characteristics of evaluation champions working in non-profit organisations?	Participants were experiential lifelong learners; they supported, encouraged, and promoted evaluation to others; they were positive, persistent, tenacious, resilient, and patient. Connected to their cooperative way of working, participants did not want to be called champions.	Linked to social interdependence theory, the label evaluation champion is not appropriate for cooperative teamwork; evaluation advocate was a preferable descriptor.	Evaluators and decision makers can engage with non-evaluators and invite involvement using advocate instead of champion which may be more acceptable and appropriate.	Use evaluation advocate as a label to support the overall goal of cooperative teamwork.
	Evaluation advocates motivate others and provide energy, interest, and enthusiasm by connecting evaluation with colleagues' personal aspirations and the organisational goals to make judgements about effectiveness.	A revised definition and field guide for evaluation advocates.	Enables advocates to recognise that they offer a unique and valued skillset and enables them to self-identify, self-assess, and find pathways into evaluation. Enables evaluators and decision makers to recruit, retain, support, and develop advocates.	Use the definition and field guide for the identification, recruitment, assessment, and development of evaluation advocates.
What motivates champions to include evaluation in their everyday practice?	Participants looked for systematic approaches to analyse evidence and make judgements about the effectiveness of their work.	The definition includes a reference to their motivations.		
In what ways, and with whom, do champions promote evaluation?	Linked to the elements of positive interdependence, promotive interaction, and social skills, participants made evaluation appealing to colleagues by: - Finding shared goals - Providing encouragement - Including diverse perspectives.	Examples of strategies that align with the elements of cooperative teamwork to make evaluation more appealing, strengthen outcomes, and increase the likelihood of embedding evaluation in organisational systems.	Advocates can recognise their strategies are worthwhile. Evaluators can incorporate the strategies participants used when engaging with non-evaluators. Professional development for advocates can incorporate strategies that align with all five elements of cooperative teamwork to intentionally increase the sustainability of efforts.	Educators could incorporate the strategies aligned with all five elements of cooperative teamwork into development opportunities for advocates and evaluators.
In what ways, and to what extent, do champions support evaluation to be embedded in the organisational system?	Participants in high hierarchical positions, or those who had influence, worked intentionally and incorporated strategies that aligned with all five elements of cooperative teamwork.			

Value and limitations

The unique value of this research was its focus on people who advocate for evaluation in organisations in the non-profit sector. The literature does not delineate between evaluation champions working in different sectors, and they can be found in different organisational settings from schools, health centres to government agencies, and even for-profit organisations. However, undertaking research in the non-profit sector was ideal for elucidating interpersonal dynamics and understanding why and how interactions were happening in a real-world context. The pressure these organisations are under from funders, the enormity of the problems they are trying to deal with, and the restricted resource environment means they need a high degree of creativity, innovation, and problem solving for longevity. The cultural and linguistic diversity of staff, clients, and volunteers as well as diversity of age, gender, education levels, learning and engagement styles, and aptitude for administration was highly variable within each of the organisations. Thereby, this research identified strategies for engaging with peers and promoting evaluation that were creative and innovative and of greater range and depth than what might have existed in a context where there were minimal communication issues or less resistance to evaluation.

Unfortunately, because of the limited resourced non-profit sector, only the minimum level of time could be allocated from the organisations to the research. Given that non-profit organisations are dealing with challenging social problems with limited resources (Boyd-Caine, 2016), the main limitations of this research relate to the lack of resources available for organisations to participate. In addition, a general distrust of research and researchers may be present among employees in non-profit organisations, based on different ideas as to what constitutes knowledge and the prioritising of practice-based wisdom (Hardwick, 2019; Kelly, 2021; Naccarella et al., 2007; Preskill, 1994; Shaw & Faulkner, 2006). This often means that access to employees' time, documents, and the internal processes of these organisations is not easily obtainable.

In this research, this meant that extensive observation and opportunities to view participants in action were simply not available. I offered project-level participants an opportunity to be involved, but their managers declined on their behalf, stating lack of time and lack of capacity. Willingness and enthusiasm were evident, but a lack of support from senior-level staff with competing priorities meant that, apart from one case, the case study organisations all had participants who were at senior levels. Individuals in senior-level positions became the dominant type of participant who was willing to take a risk and open the organisation up to an external researcher. It would have been ideal to undertake a case study with an additional individual who was influencing their organisation from a low hierarchical position, but this was not possible. For that reason, it was difficult to distinguish between the impact of project-level people who advocate for evaluation from people in senior-level positions who recognise the value of evaluation as an organisational management tool.

However, I was partially able to overcome these limitations and obtain sufficient high-quality data because of my personal characteristics as a researcher. My professional experience working in non-profit organisations, networks, years of rapport building, establishing trust, and ensuring interactions were mutually beneficial were essential characteristics. I had access to organisations not normally receptive to research because of a long-standing positive professional reputation. I had also proven my ability to interact appropriately in culturally and linguistically diverse settings and had demonstrated my commitment to supporting the non-profit sector. During the research, this meant being flexible, adaptable, and ensuring my interactions caused the organisations the least amount of disruption and provided the maximum return.

Another reason I was able to overcome the limitations of conducting research in the non-profit sector was because of the research design. The reciprocal arrangements negotiated with the case study participants enhanced the amount and quality of the data this research was able to collect. The intention of the research design was to contribute to organisational development and,

hopefully, result in a mutually beneficial arrangement. This arrangement was crucial because even for the organisations that did commit to participating, time devoted to collating documents for review, nominating available staff for interviews, and facilitating access to data management systems was still severely restricted. For example, initially the volume of data in two of the case studies was unlikely to be sufficient for rigorous analysis. Developing a report that was of value to each of the organisations overcame this issue; sharing a draft version had the effect of unlocking more of their time to find other relevant documents and additional staff to interview. Additionally, the design of the data analysis compensated for the lack of low hierarchical input into the case studies with the discussion section incorporating findings from the interviews and case studies to ensure it considered data from the project-level participants when articulating contributions and making recommendations.

Overall, although there were limitations when undertaking research in the non-profit context, the value and intention of this research were that, in addition to the field of evaluation, it would be useful for practitioners advocating for evaluation in organisations across other sectors. As I am an interpretive qualitative researcher, undertaking this research offered an opportunity to amplify the voices of those who were working under challenging circumstances to incorporate different tools, skills, and ways of thinking from multiple perspectives to achieve their organisational aims. My personal characteristics opened doors for joint exploration, and this mutually beneficial, reciprocal way of working ensured that there were sufficient data for analysis and likely increased the quality of the report provided to the organisation. Researching the interpersonal skills of people working in these challenging settings did provide useful insights and strategies that illustrate how individuals are able to overcome their organisational issues. By placing diverse voices at the centre of the research, it has hopefully identified solutions that may help others working in any setting.

Implications for practice

Implication: Use evaluation advocate as a label instead of evaluation champion to support the overall goal of cooperative teamwork.

Evaluators and decision makers could use *evaluation advocate* as a label instead of *champion* to appropriately engage with and invite non-evaluators in ways that are welcoming to more people and more appropriate when establishing cooperative teams. This title has fewer negative connotations, is less threatening to people who may not think they have the technical skills, and does not single out one individual into a role that distinguishes them from the rest of the team.

In regards to more general organisational change management, decision makers in organisations could also carefully consider the circumstances in which they label an employee as a *champion* before they allocate such a title. Decision makers need to ensure that all enabling factors, including support, employee and peers' acceptance, and resources are present before imposing such a label as it may produce negative consequences in relation to team dynamics.

Implication: Use the definition and field guide for the identification, recruitment, assessment, and development of evaluation advocates.

The revised definition and field guide could help advocates recognise that they offer a unique and valued skillset (Table 32). They could use it to self-identify, self-assess, and find professional development opportunities. The definition and field guide may help evaluation advocates acknowledge on a personal level their often overlooked and understated activities, strategies, and attributes that result in significant contributions to their organisations.

The field guide could also enable evaluators and decision makers to assist with recognising, acknowledging, recruiting, retaining, and supporting these valuable employees. Using the table to develop a job description or professional development plan, identify training opportunities, or to provide recognition of their efforts may well be worthwhile.

Implication: Educators could incorporate the strategies aligned with all five elements of cooperative teamwork into development opportunities for advocates and evaluators.

Evaluation educators could incorporate the practical examples of strategies examined in Tables 22 - 26 into training for both advocates and other cadres in the field of evaluation. Anyone attempting to make evaluation appealing and engaging for non-evaluators could use these strategies that tailor information to the needs of individuals as the basis for any interaction. Evaluators can understand more about the practical interpersonal skills required to work responsively and inclusively and incorporate these strategies when engaging with non-evaluators. Even though they take time and personal investment, this research has shown that these strategies for building positive relationships and values-based approaches are worthwhile.

To assist with increasing the likelihood of embedding evaluation in the organisational system and to find ways to work more strategically and with intent, professional development opportunities could encourage the incorporation of strategies across all five elements of cooperative teamwork. Tailored strategies and nuanced support could be particularly useful for people in lower hierarchical positions who want to extend their efforts to promote the use of evaluation and progress towards making their evaluation initiatives sustainable. Incorporating strategies that align with individual accountability and group processing to make their efforts less personality dependent could support individuals to amplify their impact and further harness their contribution.

Further research

Following on from these recommendations, two additional questions would be worth exploring in future research.

What are the similarities and differences among advocates, champions, and internal evaluators and under what circumstances do people transition from role one to another?

Participants in this research prioritised accessing, using, and understanding evaluation, and they sought out expertise, resources, and tools to help guide what they could do to support

embedding evaluation. Seeing the value in evaluation for making judgements on their organisation's worth manifested itself for the participants in seeking out information about evaluation, accessing evaluative information and people who could give them the resources they needed, using evaluation findings to communicate what they were doing, and promoting the value. They did not purport to have any evaluation technical skills, social research skills, or theoretical understanding of evaluation. They reported disinterest in learning more about how to do evaluation. These findings may suggest that participants had a reasonable level of evaluation literacy, the social and cognitive ability to understand, access, and use evaluative information to support the achievement of organisational goals, but not the skills or inclination to do evaluation (Bourgeois, 2008; Bourgeois & Cousins, 2008; Rogers et al., 2019a). In Silliman et al.'s (2016b) research, they found that while the evaluation champions had a perceived need for basic evaluation skills, what they specifically asked for was training on planning an evaluation and understanding the evaluation process (p. 29). This provides an indication that the different sets of participants may have different development needs.

Future research could investigate how evaluation advocates, evaluation champions from Silliman et al.'s (2016a) research, and evaluation practitioners from Shaw and Faulkner's (2006) research would place themselves against emerging sets of evaluator competencies. Further research could expand beyond the focus on the interpersonal and consider the organisational, contextual, and structural factors in which these positions are located to understand more about the scope of influence. This might help elucidate the differences in training needs and determine whether the reluctance to do evaluation was only in the sample of participants in this research. It would be beneficial to explore the enablers and barriers to developing evaluation skills and understanding more about the reasons behind preferences for the different skill sets. Understanding more about the circumstances in which individuals may transition to different roles is also consistent with the research on champions from other sectors (Keränen & Liozu, 2020).

In what ways do practitioners address the power imbalances and structural inequalities that underlie the interpersonal dynamics in culturally diverse contexts?

The focus of this research was exploring how individuals interact with each other and deal with differences in communication styles when promoting evaluation. Participants stated how important it was to understand their colleagues as individuals, and they promoted strategies that aligned with *individualised consideration* (Bass, 1999). However, they were reluctant to use terminology such as cross-cultural, culturally responsive, or culturally appropriate, and they did not want to separate cultural competence from other types of social skills. This strongly articulated sentiment from experienced participants working in culturally diverse organisations is an important point that deserves further exploration. While it was beyond the scope of this research, further inquiries could explore if and how their way of working ignores power imbalances and the underlying structural inequalities or whether they have a highly developed version of inclusivity.

Participants did indicate that they were aspiring to address power imbalances and doing what was within their power and control to address issues of inequity. For example, in identifying participants' underlying motivations for working in the non-profit sector, they reported being focused on addressing social inequalities, and many participants were working in organisations that had a guiding vision of social justice and inclusion (Brazzel, 2007). They also had a desire to obtain evidence to identify more precisely what was taking place and whether their efforts were making a difference in addressing inequalities. However, this research did not designate sufficient focus on this topic to make any conclusive statements.

Researchers and practitioners have been critical of approaches that do not pay enough attention to culture, racial differences specifically, and underlying power dynamics (Archibald et al., 2018; Brazzel, 2007; Chilisa & Ntseane, 2010; Chouinard, 2014; Chouinard & Cousins, 2015; Davidson, 2014; Hyde, 2004; Stickl Haugen & Chouinard, 2018; Thomas & Parsons, 2016). Askew, Beverly, and Jay (2012) stated, "Without explicit attention to considerations raised in culturally

responsive evaluation approaches (for example, issues of race, power, and privilege), the voices and concerns of marginalized and underserved populations may be acknowledged, but not explicitly or adequately addressed" (p. 552). For these scholars, acknowledging everyone as diverse does not go far enough to address the underlying power imbalances and may well continue to perpetuate inequalities among staff. Recent literature is calling for cross-cultural evaluation approaches and participatory ways of working to go beyond just looking at the team dynamics and the situation in front of people and think about the underlying system (Chouinard, 2014). Hyde (2004) suggests:

> A fully realized multicultural agency is premised on a broader definition of diversity, a reconfiguration of power and privilege, and a commitment to social justice. It strives to create one culture premised on the strengths of various groups (for example, race, socioeconomic status, gender) and perspectives within the organization. (p. 8)

Froncek and Rohmann (2019) have also articulated a need to address the underlying system in critiques of social interdependence theory. They suggest that the theory lacks guidance for minimising the negative outcomes of encouraging participation when there are power imbalances in the workplace. Froncek and Rohmann (2019) draw upon the procedural justice literature that proposes that individuals develop their socioemotional interests through their relationship to the group. They suggest procedural justice can help evaluators understand interpersonal dynamics. These recent publications recommend that employees and evaluators think more deeply about the way interaction is occurring and change their practice to address some of the underlying causes.

Further research could explore this issue in greater depth. It could examine the strategies people are using and if they are effective. It could determine the value of high quality interactions on an interpersonal level compared with other types of social skills and assess whether practitioners would be willing to increase the emphasis placed on the social and emotional interests of the group on a social inequality level (Froncek & Rohmann, 2019). It seems likely that evaluation advocates

would find this call to action in the recent publications useful for extending their thinking and re-evaluating their roles, but further research could assist to assess this claim.

Conclusion

This thesis began by introducing a participant called Tahlia. Her vignette in Chapter 1 provided an example of a person who advocates for evaluation in their organisation. She identified as an Aboriginal and Torres Strait Islander person and had intimate knowledge of the context and people with and for whom she was working. Tahlia was not an evaluator, but promoted evaluation to resistant colleagues for improvement purposes. She was initially scared of evaluation, but she overcame her fears and became an advocate among her colleagues, fellow board members, friends, and family. She showed them how evaluation could help achieve their goals. Tahlia found ways of connecting her co-workers with tools and resources that could be adapted to answer their questions. She found small tangible ways of promoting evaluation and used her interpersonal skills to influence colleagues. Tahlia found success by making suggestions that her manager adopted and by providing encouragement to keep her co-workers engaged.

Through this research I learnt how evaluation advocates like Tahlia inspire others. The passion for their work was infectious, and their dedication and personal efforts were admirable. However, more importantly, what I took away from the research was hope. I witnessed effective cooperation in action. I documented how people can work together and progress towards their aspirations. I found evidence that positive change was able to occur even when some team members might not have been fully on board at the beginning, were anxious about what could happen to them personally, were reluctant to get involved, or were possibly even just resistant to change. These are large obstacles for participants to overcome, but I listened to accounts about how evaluation advocates found ways to cooperate and collectively improve the way they worked.

Therefore, I end this research hopeful about the future of non-profit organisations in their quest to make a difference in the lives of the most vulnerable in our communities. Beyond an

organisational level, I am hopeful that within our global community there are effective individuals striving to make cooperative interactions the dominant way of working and engaging with others to achieve positive change. Cooperative ways of working could well be the essence of what the world needs to help us solve our seemingly overwhelming problems. In closing, I would like to acknowledge that the 17 participants from this research are just a handful of people among millions who are striving for cooperative relationships in their quest to make the world a better place.

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APPENDICES

Appendix A

Literature review methodology based on Rogers and Gullickson (2018)

I initially searched the literature for examples of evaluation in organisations, for models of internal evaluation, and for approaches to undertaking evaluation capacity building. Search terms were initially broad and were not restricted by time to encompass circumstances where interpersonal dynamics may be challenging (capacity building and cross-cultural situations). I came across a term called evaluation champions – people who do not identify as evaluators but are enthusiastic about the potential for evaluation.

While I talked to external and internal evaluators about these individuals, I reengaged with the literature with a more specific focus on evaluation champions. I searched extensively about how the term came into existence from organisational development through to collating all instances where I found the term evaluation champion in the literature. I also compiled pieces of information that could help me build a proposed definition that included the possible activities of an evaluation champion. I read the literature on internal evaluators, evaluation capacity building practitioners, and evaluative thinkers. I also drew upon the theories of evaluation use and social interdependence to help understand how these individuals may be interacting with their colleagues. The proposed definition was useful for starting to develop a picture of what individuals might be doing in their organisation regarding evaluation. I also used it to assist with recruiting participants and generate the interview questions. The aim was to see whether the literature and theory resonated with how individuals were working in the real world.

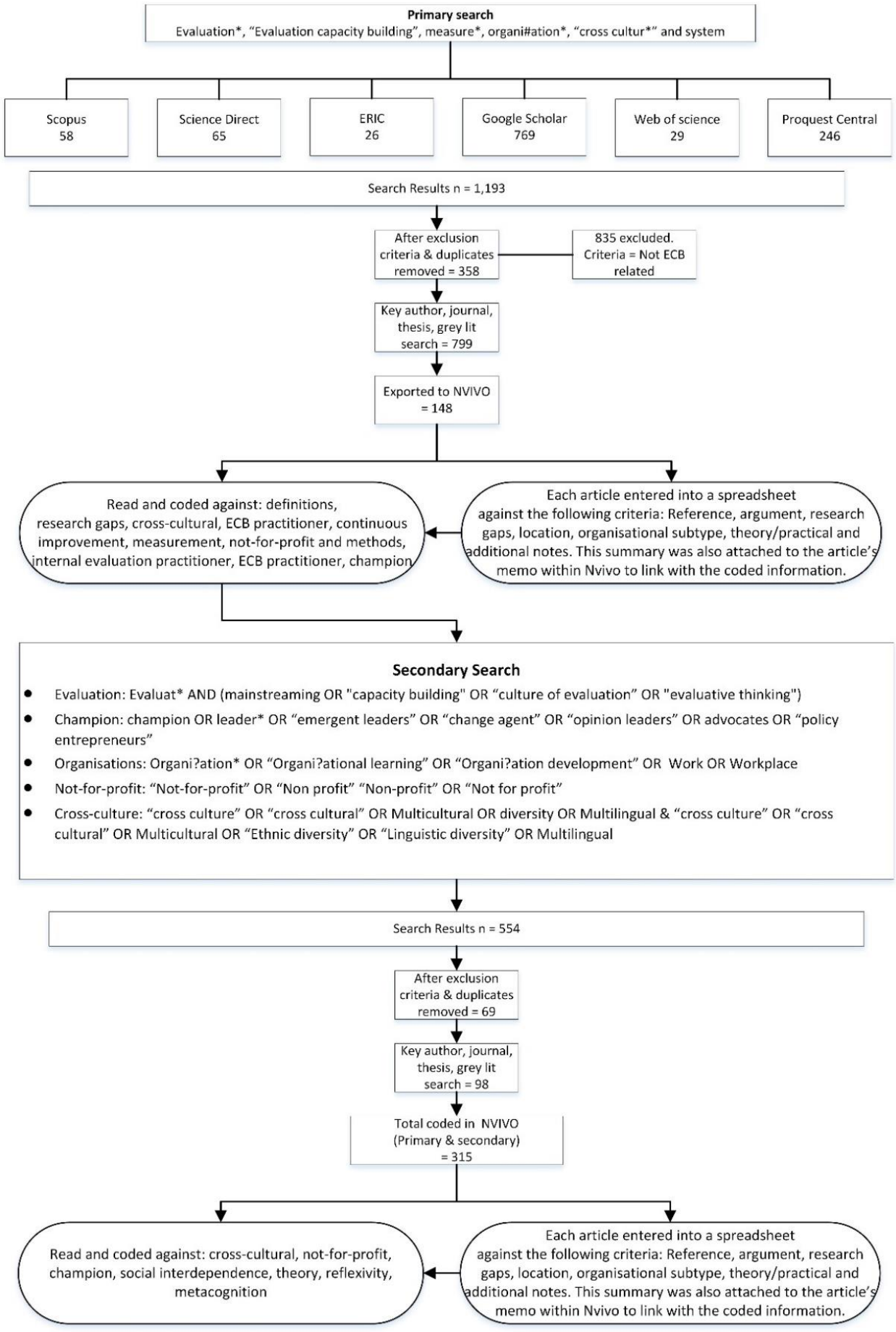
The initial review of the literature included 1) Evaluation capacity building in organisations, 2) Evaluation in non-profit organisations, 3) Evaluation in cross-cultural contexts. Sampling involved a structured review of peer-reviewed articles and relevant grey literature, limited to the English

language. I conducted the search for relevant articles across the ScienceDirect, Scopus, Web of Science, ERIC, Google Scholar, and Proquest Central databases. I also used Google to search the grey literature. Initially finding nearly 800 articles, following a preliminary scan, I read and coded 148 articles using NVIVO software against definitions, research gaps, cross-cultural, evaluation capacity building practitioner, continuous improvement, measurement, non-profit, internal evaluator, and champion (NVivo, 2012). I found a reference to evaluation champions in 36 of the 148 articles.

I then conducted a subsequent review using the following search terms:

- Evaluation: Evaluat* AND (mainstreaming OR "capacity building" OR “culture of evaluation” OR "evaluative thinking")
- Champion: champion OR leader* OR “emergent leaders” OR “change agent” OR “opinion leaders” OR advocates OR “policy entrepreneurs”
- Organisations: Organi?ation* OR “Organi?ational learning” OR “Organi?ation development” OR Work OR Workplace
- Not-for-profit: “Not-for-profit” OR “Non profit” “Non-profit” OR “Not for profit”
- Cross-culture: “cross culture” OR “cross cultural” OR Multicultural OR diversity OR Multilingual AND “cross culture” OR “cross cultural” OR Multicultural OR “Ethnic diversity” OR “Linguistic diversity” OR Multilingual

I also used the snowballing technique to pursue relevant references cited in the retrieved literature. Known also as reference harvesting or pearl growing, snowballing is an approach to find additional evidence was not retrieved through the initial search (Choong et al., 2014; Smith, 2012). Throughout data collection, I used alerts from the databases to advise me of any new articles that contained my search terms. I retrieved an additional 167 articles, making a total of 315. I read and coded in addition to the terms listed above against cross-cultural, non-profit, champion, and social interdependence theory. The following figure provides a summary of the process.


Primary search
Evaluation*, "Evaluation capacity building", measure*, organi#ation*, "cross cultur*" and system
Scopus 58
Science Direct 65
ERIC 26
Google Scholar 769
Web of science 29
Proquest Central 246
Search Results n = 1,193
After exclusion criteria & duplicates removed = 358
835 excluded. Criteria = Not ECB related
Key author, journal, thesis, grey lit search = 799
Exported to NVIVO = 148
Read and coded against: definitions, research gaps, cross-cultural, ECB practitioner, continuous improvement, measurement, not-for-profit and methods, internal evaluation practitioner, ECB practitioner, champion
Each article entered into a spreadsheet against the following criteria: Reference, argument, research gaps, location, organisational subtype, theory/practical and additional notes. This summary was also attached to the article's memo within Nvivo to link with the coded information.
Secondary Search
Evaluation: Evaluat* AND (mainstreaming OR "capacity building" OR "culture of evaluation" OR "evaluative thinking")
Champion: champion OR leader* OR "emergent leaders" OR "change agent" OR "opinion leaders" OR advocates OR "policy entrepreneurs"
Organisations: Organi?ation* OR "Organi?ational learning" OR "Organi?ation development" OR Work OR Workplace
Not-for-profit: "Not-for-profit" OR "Non profit" "Non-profit" OR "Not for profit"
Cross-culture: "cross culture" OR "cross cultural" OR Multicultural OR diversity OR Multilingual & "cross culture" OR "cross cultural" OR Multicultural OR "Ethnic diversity" OR "Linguistic diversity" OR Multilingual
Search Results n = 554
After exclusion criteria & duplicates removed = 69
Key author, journal, thesis, grey lit search = 98
Total coded in NVIVO (Primary & secondary) = 315
Read and coded against: cross-cultural, not-for-profit, champion, social interdependence, theory, reflexivity, metacognition
Each article entered into a spreadsheet against the following criteria: Reference, argument, research gaps, location, organisational subtype, theory/practical and additional notes. This summary was also attached to the article's memo within Nvivo to link with the coded information.

Appendix B

Key references to evaluation champions based on Rogers and Gullickson (2018)

Reference	Key Quotation
Alaimo, 2008b, p. 267	Fischer cites Weaver's leadership as the driving force behind enabling him to advance program evaluation in Families First: "He was vitally interested in evaluation, a real champion of it, and he asked tough questions."
Aponte-Soto et al., 2014, pp. 37, 42	Championing culturally responsive leadership for evaluation practice. The face-to-face connections with CRE champions and attending AEA sessions on CRE influenced me to become an advocate.
Arasanz and Nylen, 2020, p. 2	This is why a fundamental guiding principle of the ESP is learning by doing, where key champions of the community organizations are internally selected to participate in the evaluation.
Arnold, 2006, p. 262	Working in small, collaborative teams allows educators to experience all phases of the evaluation process without having to "go it alone."
Baker, Wilkerson, and Brennan, 2012, p. S292	CHAMPIONS: Local champions had the following characteristics: visionary, charismatic, energetic, possessing a take-charge attitude, passionate, well-known, and respected, well- connected with a strong network of resources, trusted by the community and the partnership, competent, persistent, and politically savvy.
Bourgeois, Whynot, and Thériault, 2015, pp. 51-54	With no history of evaluation in the organization until recently, and with a dissenting Board of Directors regarding the usefulness of evaluation in decision-making, the capacity level of this organization is likely to remain low, until a champion can be found to support the conduct and use of evaluation on an ongoing basis. The capacity level of this organization is likely to remain low, until a champion can be found to support the conduct and use of evaluation on an ongoing basis. The leaders or champions of evaluation within all three organizations played a critical role in ensuring adequate resourcing for evaluation activities and in promoting evaluation use
Boyd, 2009, p. 1	Evaluation champions are leaders who have influence in the organization and who support and value evaluative thinking… How evaluators and administrators will involve people early in processes, connect key people, and be champions of the effort.
Brandon, Smith, and Hwalek, 2011, p. 300	Second, a client organization has to have an ''evaluation champion'' who is closely involved in the study. This is a person who brings the evaluation to the right people at the right time for the right discussion…. When there is trust, a sense of equality, a caring about each other's needs, a champion for evaluation within the client organization, and an organizational culture of learning, evaluation can be a powerful, value-added service. When some or all of these are not present, evaluation can be a waste of time and money.
Bryson and Patton, 2015, pp. 33-34	Evaluation sponsors (persons with enough authority or power, or both, to commission an evaluation) or process champions (persons who will focus on managing the day - to - day effort and keeping every- one on track) may be part of the group or may be identified during the group's process. Evaluators must find strategically located people who are committed, competent, and connected — in short, who are tipping point connectors, people who are looked to by others for information (Gladwell, 2000).
Buckley, Archibald, Hargraves, and Trochim, 2015, p. 384	If Evaluative Thinking (ET) is promoted by an evaluation champion in a position of influence and is increasingly practiced by members of the organization as part of a learning community, an evaluation culture will follow. No single workshop can change an organization's culture. This will depend on internal ''evaluation champions''… being continuously supported by an ET professional as well as administrators and policies internal to the organization.
Cairns, Harris, Hutchison, and Tricker, 2005, p. 146	Our study findings also suggest that effective implementation is more likely to take place in organizations with leaders who are committed to the selected system, or systems, and can act as quality champions, explaining purposes and allowing exploration of multiple means of achieving quality ends.

Reference	Key Quotation
Cerra, Drake, Sick, and King, 2015, p. 55	A number of recommendations may aid future course development. First, when implementing IPE interventions, it may be helpful to identify site champions and enroll them in ongoing, formal training in the field of IPECP. After receiving formal training, champions can be used to host future courses.
Chaudhary et al., 2020, p. 5	Identify Extension agents and specialists who can serve as evaluation champions to help others with evaluation.
Christie & Vo, 2011, pp. 557-559	The objective is not to demonstrate that one can do an evaluation, rather to train people who are leading evaluations and who are consumers of evaluation to be ''evaluation champions'' in their organizations; to be evaluation advocates, and informed evaluation consumers. They may or may not stay in the [evaluation] field, but without question they will be champions for evaluation.
Chubinski et al., 2019, p. 63	Supportive leaders: Leaders are committed to organizational learning • Clear vision and goals for organizational learning • Champions and role model
Cousins and Bourgeois, 2014a, pp. 104, 108	Enablers: senior commitment and championing…. Such individuals and administrative teams demonstrate commitment to evaluation through the development of organizational policies and procedures that rely on evaluation data. Leaders not only promote the use of evidence for decision making and learning but they also model it.
Cousins and Bourgeois, 2014b, pp. 38, 52	The process can also spawn a new (user) champion for evaluation. At the same time, interviewees noted the existence of strong evaluation champions who have and continue to strongly promote the value and use of evaluation as being an important driver for evaluation at IDRC.
Dickinson and Adams, 2012, p. 29	For evaluation capacity building to be successful, it is also important to identify evaluation champions within organisational management and among groups within organisations.
Greenhalgh et al., 2004, p. 603	The different champion roles for organizational innovations include (1) the organizational maverick, who gives the innovators autonomy from the organization's rules, procedures, and systems so they can establish creative solutions to existing problems; (2) the transformational leader, who harnesses support from other members of the organization; (3) the organizational buffer, who creates a loose monitoring system to ensure that innovators properly use the organization's resources while still allowing them to act creatively; and (4) the network facilitator, who develops cross-functional coalitions within the organization (for moderate indirect evidence, see Shane 1995). There is very little direct empirical evidence on how to identify, and systematically harness the energy of, organizational champions.
Guerra-López and Hicks, 2015, p. 24	This project benefited from the support of internal champions and the active involvement of all other stakeholders…. The support of an internal champion drives the initiative as well as sees it through post implementation.
Hanwright and Makinson, 2008, p. 22	By doing this, we have been able to develop 'champions' across the agency who share with colleagues in their immediate work units the value of evaluation. As a result, whole work units now incorporate evaluation into the planning of new major projects from their inception.
Kegeles, Rebchook, and Tebbetts, 2005, p. 292	Need buy–in from all levels and a champion of evaluation at a higher level.
King, 2002, p. 74	Some of the components to support the implementation were in place: (1) many committed professionals who were used to collaboration and were eager to make sense of their practice.
King, 2005, p. 93	The committee would directly seek to improve the school climate, making it supportive of change through evaluation. They would do this by their positive attitudes toward evaluation, their open-mindedness when challenged, their respect for colleagues' opinions, their enthusiasm for risk taking and creativity, and a continuing sense of good humor. Committee members would become evaluation champions, serving as visible supporters of the process, mentioning it in favorable terms, identifying issues for possible study, and taking on naysayers pleasantly but firmly throughout the school day and across the school year.
King, 2007, p. 49	First, you must identify individuals who understand or intuitively get evaluation, that is, people who are willing to spend time with you discussing options, thinking about how to involve others, and eventually making sense of data.
King, 2016, p. 10	Third, pay continuous attention to developing productive connections with these evaluation users so that when the time comes to consider next steps following an evaluation, you have strong relationships on which to build.

Reference	Key Quotation
King, 2020, p. 4	Two of them have already been discussed as possible mechanisms, either in general or in specific: (1) identifying and supporting evaluation champions who would nurture evaluative thinking in themselves and others, and (2) working with these champions to construct an evaluation process and structures to support continuing evaluation capacity in the organization.
King and Volkov, 2005, p. 13	The value of evaluation champions is hard to overestimate. Although leadership is critical, so too are the activities of people who champion the evaluation cause…. people voluntarily implementing evaluation activities and purposely passing their evaluative spirit and knowledge to their colleagues.
Labin, 2014, p. 109	Outcomes - Organizational Level - evaluation capacity building focused - Leadership = Champion
LaMarre et al., 2020, p. 1005	Underscoring the need to at least partly level the evaluation playing field, some PHUs had begun to engage in their own ECB, including through exploring mentorship opportunities, joining or creating communities of practice, delegating "evaluation champions," offering training, and creating guidelines.
Lennie, 2005, p. 21	One of the learnings from the project was that such issues need to be dealt with in a proactive but sympathetic manner through strategies such as choosing local 'champions' and coordinators carefully and personally approaching key leaders and stakeholders in the community.
Mackay, 2002, p. 96	This support should include a strong champion who is both willing and able to push hard for evaluation capacity building to happen and to keep pushing hard until it has become embedded in the corporate culture.
Maxwell, Rotz, and Garcia, 2016, p. 17	Before developing a [data-driven decision making] DDDM investment or capacity-building plan, a champion of DDDM should clearly articulate his or her expectations and parameters.
Mayne, 2010, pp. 8-11	Strong senior leadership in building an evaluative culture can be evident through such actions as: - supporting the results management regime, including demonstrating the benefits of using evidence, identifying and supporting results management champions… supporting results management with resources, and supporting managers who experiment and make use of the lessons learned…..This capacity can be enhanced through: identifying and encouraging *peer champions*
McDonald, Rogers, and Kefford, 2003, p. 13	The fifth factor was personal. People who were involved in the early stages of building evaluation capability in one project moved into positions where they could influence the whole Division, becoming evaluation champions.
Milstein, Chapel, Wetterhall, and Cotton, 2002, p. 38	Designate an Organizational Lead or Champion Designate an organizational entity to be the agency wide focal point and champion for evaluation and program improvement
Nielsen, Lemire, and Skov, 2011, p. 333	Organizational context covers issues such as externally mandated requirements as well as internal context in the form of items such as supportive leadership, the presence of an evaluation champion, broad-based interest in, and demand for, evaluation information, an internal environment that encourages change, and sufficient input in decision making
Nu'Man, King, Bhalakia, and Criss, 2007, p. S31	Foster an internal demand or motivation for evaluation. Organizations realizing the greatest benefits were those that participated as active partners, being motivated to improve the efficacy of their interventions and willing to champion evaluation activities.
Nylen and Sridharan, 2020, pp. 2-3	While progress was slower for this organization, champions for evaluation and its benefits have now taken root. This scenario highlights the reality that most organizations face and why changing organizational culture is not always straightforward and why programs like the ESP can offer support. We recognize that building evaluation culture is a long-term effort that often requires key champions and the right levels of organizational readiness to raise tough questions around self-reflection, learning, and accountability.
Owen, 2003, p. 46	The inclusion of a staff member on the evaluation team served to embed the evaluation process in the ongoing fabric of the organisation. This provided a degree of ownership and reduced the chance of a two-cultures mentality towards evaluation (Owen & McDonald 1999).
Parsons, Lovato, Hutchinson, and Wilson, 2016, pp. 31-34	We also have some new evaluation champions who are now engaging more actively in discussions about evaluation.

Reference	Key Quotation
	Using relatively minimal inputs, E-CLIPs were able to successfully deliver on a number of evaluation capacity-building outcomes, including increased appreciation and knowledge of evaluation, increased independent evaluation activity, better quality evaluation, more internal evaluation champions, and the increased use of evidence for program improvement.
Pejsa, 2011, p. 40	The need to work with people, identify evaluation champions, and address organizational context are common with studies in the school context, as well as assertions made in the prescriptive literature.
Preskill, 2007, p. 5	Leaders who support evaluation: - Are champions of evaluation – they actively engage in, and encourage others to think evaluatively.
Preskill and Boyle, 2008a, p. 455	In addition to financial resources, the organization must also invest in personnel with evaluation expertise who can champion ongoing evaluation activity and provide evaluation assistance to staff members as needs arise.
Preskill and Boyle, 2008b, p. 165	Enlisting these people in motivating others to engage in evaluations, encouraging them to ask the critical questions, helping them implement and act on the evaluation findings, and providing support and resources for evaluation work are all ways in which internal champions can serve the evaluation capacity building effort.
Schwarzman et al., 2019, p. 81	This interpretation of leadership reflects a breadth of examples of leadership for evaluation (e.g., champion evaluation…
Silliman et al., 2016a, p. 1	Evaluation champions are individuals who serve as catalysts for building evaluation capacity within an organization. They advocate for the importance of program evaluation, model good evaluation behaviors, and mentor their peers in program evaluation skills and competencies.
Silliman et al., 2016b, p. 22	Champions include line supervisors and rank-and-file co-workers who actively advocate, model good practice, conduct training, and mentor peers in program evaluation.
Sonnichsen, 2000, pp. 67, 110	In traditional, stabilized, hierarchically aligned organizations with clearly established, centralized lines of authority, internal evaluators achieve their power (and thus the ability to influence the organization) through the support of senior officials and "champions" who provide legitimacy for the evaluation process. In some cases after the completion of an evaluation, it may be necessary to locate and cultivate "champions," those persons who believe in the evaluation findings and recommended courses of action. Champions can diffuse the resistance among their peers and hasten acceptance of the recommended courses of action.
Stockdill, Baizerman and Compton, 2002, p. 21	Some roles that have been identified by a long-time evaluation capacity building practitioner who is also a case author are the • Champion role (often at a senior-level within an organization) • Manager or coordinator of evaluation capacity building activities (which has elements of salesmanship and advocacy and could include organizing others to conduct evaluations, provide evaluation training, or provide evaluation advice • Technical evaluation functions In a small organization, all these roles might be combined into one.
Stockmann, 2016, p. 60	Institutional evaluation champions that are open to building learning and reflection into their organizational practice should be identified and supported.
Szijarto and Cousins, 2018, p. 170	Championing. The evaluations had champions within the funding agencies in three cases and accounts highlighted their importance to making space for DE. In one case, an internal staff person in a leadership position was described as acting as a broker between the levels of the organization, reporting and providing assurance upward about the value that DE was bringing to the initiative. They also acted as a counsellor for staff who struggled to adapt to the approach. In another case, an internal staff person acted as a trusted advisor who was “in touch” with what was happening in the collaboration and the local community and who acted to interpret local issues for the evaluators (based elsewhere), which supported their sensitivity to changing conditions in the context.
Taylor-Powell, and Boyd, 2008, p. 61	They must be continuously identified and nurtured to grow the evaluation culture and to withstand potential setbacks when a key ally moves or retires or when less interested administrators take the helm…. We have found that working with these individuals over time, cementing relationships, and encouraging reflective practice help to build a cadre of key advocates that can communicate the value of evaluation and share evaluation capacity building responsibilities.
Volkov, 2011, p. 31	Major role category: Advocate - Program advocate; advocacy for support; champion of evaluation; advocate for intended primary users; evaluation use advocate; advocate for the program’s target groups; advocate for the most vulnerable population; advocate for cultural justice.
Volkov and King, 2007, p. 1	Locate existing and enlist new evaluation champion(s) in the organization.

Reference	Key Quotation
Wade & Kallemeyn, 2020, p. 3	Leadership support for the change or an enthusiastic and engaged champion of the change within the organization that helps facilitate and sustain the change.
Wandersman, 2014, p. 101	Presents several factors that practitioners should consider when attempting to sustain an effective program: (a) ‘‘buy in,’’ (b) effectiveness, (c) diversity of funding, (d) staff training, (e) presence of a program champion, and (f) political capital of the program.
Weiss, 1999, p. 468	This kind of ‘enlightenment’ is difficult to see, and it works best when it receives support from policy champions.

Appendix C

Interview guide – Interviewees

1. Can you please tell me about your professional background and the reasons why you work in this sector?
2. What do you think of when I talk about evaluation?
3. Do you have an experience with evaluation that you would like to share?
4. Why and under what circumstances did you first engage with evaluation?
5. What motivates you to incorporate evaluation into your work?
6. What would you say are your skills related to evaluation?
7. Where have you sourced information on evaluation?
8. What attitude do you think you bring to evaluation?
9. How do you encourage others to engage with evaluation?
10. Can you recall an example when this worked well?
11. How do you handle people who've had bad evaluation experiences in the past?
12. In relation to evaluation, what do you consider to be important when working in culturally diverse teams?
13. What do you think are the key factors required to embed and sustain evaluation in an organisation?
14. Please give an example of what has worked for you.
15. What challenges have you faced?
16. Do you see yourself as a champion of evaluation? (See attached for some inspiration)
17. Any risks associated with being considered a champion of evaluation?
18. Any characteristic that you strongly identify with?
19. Which ones are most important in a culturally diverse setting? Anything missing?
20. Are there support structures in place to assist your work with evaluation?
21. What type of support would be of further assistance?
22. What lessons would you want to share with other champions?
23. Approaches, tools, techniques or processes that you would repeat?
24. Anything else to add?

Interview guide – Case study participants

1. Can you please tell me about your professional background and the reasons why you work in this sector?
2. What do you think of when I talk about evaluation?
3. Please tell me what you have been working on with Fred?
4. How did you get involved?
5. What has been the most rewarding activity?
6. What skills does Fred use to incorporate evaluation?
7. What are the attitudes that Fred brings around evaluation?
8. How does Fred encourage others to be involved with evaluation?
9. Please give an example of a time when this worked well.
10. How have the people you work with found their involvement with evaluation?
11. In relation to evaluation, what do you think are important considerations when working in culturally diverse teams?
12. How does Fred handle these considerations?
13. What changes (positive and negative) have happened in the organisation in regards to evaluation?
14. What is it about Fred that has facilitated the changes?
15. How sustainable will the changes be in the long-term?
16. What evaluation lessons might you share with others?
17. Anything else to add?

Case study protocol

CASE STUDY PROTOCOL

Understanding evaluation champions in culturally diverse not-for-profit organisations.

A. OVERVIEW OF THE CASE STUDY

1. Introduction

   This case study forms part of a study on evaluation champions being conducted by PhD student Alison Rogers under supervision of Dr Amy Gullickson at the Centre for Program Evaluation, Melbourne Graduate School of Education, University of Melbourne (amy.gullickson@unimelb.edu.au 03 9035 9682).

   Evaluation champions are organisational employees that use reflection and critical thinking skills in their practice and promote evaluation amongst their colleagues. The purpose of this study is to understand how champions promote evaluation within not-for-profit organisations. This includes exploring how champions think about evaluation, interact with their colleagues and work towards embedding evaluation. In this research 'evaluation' refers to how organisations assess their own performance to see if they are achieving their strategic ambitions, how the organisations assess the programs and services that they deliver and/or how the organisations develop systems to learn and improve on an ongoing basis. This study will develop an in-depth description and practical strategies to support evaluation champions.

2. Case study questions

   The purpose of this case study is to explore how employees within [Insert organisation] interact around evaluation and consider what has happened as a result of the focus on evaluation. The overarching questions that will guide the case study include:

   - How have employees within this organisation engaged with each other around evaluation?
   - What has happened since there has been a focus on evaluation?

3. Framework for the case study

   This will be a case study that will consider what has happened in this organisation over the past [X] years. The purpose is to consider evidence that could be linked with information that has come from an interview undertaken previously. The case studies will involve semi-structured interviews with employees of [Insert organisation] and a document analysis.

   As part of the study as a whole, the findings in this case study will be compared with findings from other case studies undertaken with not-for-profit organisations that are also working in culturally diverse settings. This means that there will be results available from an individual case study but some results will be generalised through the identification of patterns.

4. This protocol

   The purpose of this document is to outline the standard approach that will be undertaken at each of the case study sites. However, this document will also include an opportunity for [insert organisation] to document specific organisational requirements and expectations. The finalised protocol will provide a guide for interaction throughout the study.

B. DATA COLLECTION PROCEDURES

1. Researcher

Alison Rogers, a PhD student with the University of Melbourne, will conduct the research. Alison has worked for an international non-government organisation for over 8 years, has experience in public health and community development and has previously been involved with research looking at food systems in remote Aboriginal and Torres Strait Islander communities. Alison is very interested to learn about how other organisations are engaging with evaluation and how people from different cultural backgrounds work together to focus on evaluation. By exploring what has happened it is hoped that the findings will be useful and make a contribution to the development of this organisation. Alison is very willing to take the lead from the organisation about the process so that the case study is appropriate for this context. Advice will be sought at each step to clarify appropriateness and relevance. It is hoped that by working in this way, with a commitment to ongoing clear communication of expectations, a mutually beneficial partnership will be able to develop a useful product for the organisation.

2. Data collection plan (Type of evidence, roles of people to be interview, events to be observed, other documents to be reviewed when on site).

Interviews

Interview guide attached.

Interviews will be with the following representatives:

- [Names, titles, email addresses & phone numbers to be inserted by the organisation]
-

Depending upon location of the participant these interviews may be conducted face to face or via telephone / internet link. All interviewees will be able to choose a safe space in which to conduct the interview. All interviewees will receive a copy of the interview questions prior to the interview. The approximate time commitment is one hour. The interview will be recorded and there will be an opportunity for the interviewee to review the transcript to remove, add or clarify any information.

Document review

The documents could include, but not be limited to, evaluation reports, presentations, board reports, meetings of minutes and donor reports. Researcher and organisation to insert titles of documents and locations:

- [Title, location]
-

Site visit

A site visit may be required predominantly for the purpose of face to face interviews. Any other activities for the purpose of observation may also be noted here. Researcher and organisation to insert location and date of visit:

- [Location and date]
- [Primary purpose]
- [Secondary purpose]

3. Expected preparation prior to fieldwork
   - [Insert info to be reviewed and issues to be covered, prior to site visit]
   - [Insert any local requirements; adherence to cultural protocols, ethics approval processes]

C. RISK MANAGEMENT

1. Confidentiality and anonymity

All participants will be de-identified. Only aggregate results will be reported. The confidentiality and anonymity of responses will be upheld through the use of pseudonyms, coding, and changes to other identifying information that will be applied to the transcripts before analysis. All references to the organisation in the researcher's thesis will be anonymous as this organisation will be given the pseudonym 'Organisation A'.

2. Consider how politically, culturally and/or ethically sensitive topics will be handled and insert jointly agreed strategies here:

- [Strategies]

D. DATA COLLECTION QUESTIONS

Study questions	Interview questions for colleagues of champion	Document Analysis
What are the characteristics of an evaluation champion working in culturally diverse not-for-profit organisations?		
What motivates champions to include evaluation in their everyday practice?	Background about self, organisation and professional experience What do you think of when I talk about evaluation? Can you tell me about what you have been working on with [champion]? What do you think motivates [champion] to incorporate evaluation? What are their skills? What are their qualities that they bring? Would you consider them to be a champion of evaluation?	Document analysis for production of timelines &/or social network analysis maps
In what ways and with whom do champions promote evaluation?	What strategies does the [champion] use to engage with the team? Who does the champion work with? How have the people connected to [champion] found their involvement? What considerations do they give to the culturally diverse team?	Vignettes &/or evidence mapping
In what ways, and to what extent, do champions support evaluation to be embedded within the organisational system?	What changes have happened in the organisation in regards to evaluation? How has [champion] contributed to the change? What is it about the champion that has facilitated the changes? Do you have any lessons to share with others?	Combination of vignettes, timelines &/or other systems analysis tools.

E. GUIDE FOR THE CASE STUDY REPORT

The format of the final report will be negotiated by the researcher and organisation. Formats may include, but not be limited to, an oral presentation, written report or multimedia product.

Negotiated specifications to be inserted here:

- Audience(s) or intended users for the report
- Stylistic preferences for communicating with the audience(s)
- Specific questions related to organisational requirements
- Attachments: Chronology of events covering implementation and outcomes of the practice at this site, logic model of the practice, depiction of data, references to relevant documents, list of persons interviewed.
- Due date for final draft
- Intellectual property requirements
- Authorship agreement

F. BEYOND THE SCOPE

This Project is not intended to:

Negotiated specifications to be inserted here:

-

-

G. KEY DELIVERABLES

Negotiated specifications to be inserted here:

-

-

H. TIMING

It is anticipated that # days of work will be required on site and # days to undertake the analysis.

The site visit will be scheduled for: [Insert dates]

The draft report will be delivered: [Insert date]

The final report will be delivered: [Inset date]

I. ATTACHMENTS

- Insert any required attachments

J. AGREEMENT

Signed By researcher + Date: ……

Signed By organisational representative + Date: ……

K. REFERENCES

Eisenhardt, K., & Graebner, M. (2007). Theory building from cases: Opportunities and challenges. *Academy of Management Journal*, 50(1), 25–32.

Stake, R. E. (2006). *Multiple case study analysis*. Guilford Press.

Appendix D

Initial email – Evaluators

To: [Insert email address]

Date: [Insert]

Subject: Evaluation Champions

Attachment: Plain Language statement

Content:

Hello [Insert title & name]

I'm Alison Rogers, a PhD student under supervision of Dr Amy Gullickson at the Centre for Program Evaluation, Melbourne Graduate School of Education, University of Melbourne (amy.gullickson@unimelb.edu.au 03 9035 9682). The title of my research project is 'Understanding evaluation champions in culturally diverse not-for-profit organisations.'

I am emailing to ask you to consider nominating an evaluation champion to be part of my study: someone who works in a not-for-profit organisation, is interested in evaluation, practises reflection and critical thinking, and promotes evaluation among their colleagues.

The purpose of this study is to understand how champions promote evaluation within culturally diverse not-for-profit organisations. This includes exploring how champions think about evaluation, interact with their colleagues and work towards embedding evaluation. In this research, 'evaluation' refers to how organisations assess their performance against strategic ambitions, how they assess their programs and services and/or how they learn and improve on an ongoing basis. This study will develop an in-depth description and practical strategies to support evaluation champions.

The eligibility criteria include:

- Employed in a not-for-profit organisation that employs and works with people from culturally diverse backgrounds
- Does not have any reference to evaluation in their job title
- Displays characteristics or undertakes strategies and activities that may be indicative of the behaviours of an evaluation champion (Refer to attachment for more inspiration)
    - Has an interest in and energy for evaluation
    - Motivates others to engage in monitoring, evaluation, and learning
    - Asks, and encourages others to ask, critical questions
    - Helps others to implement and act on findings and recommendations
    - Provides or advocate for support and resources for evaluation
    - Nominated by an external evaluator or colleague as a champion

If you know anyone that meets these criteria, please feel free to send them the information about this study attached or forward me their email address and I will contact them directly.

If you have any questions or require more information about the study itself, don't hesitate to email me arogers1@student.unimelb.edu.au or call (0448227422).

Regards,

Alison Rogers

Initial email – Potential participants

To: [Insert email address]

Date: [Insert]

Subject: Evaluation Champions

Attachment: Plain Language statement

Content:

Hello [Insert title & name]

I'm Alison Rogers, a PhD student under supervision of Dr Amy Gullickson at the Centre for Program Evaluation, Melbourne Graduate School of Education, University of Melbourne (amy.gullickson@unimelb.edu.au 03 9035 9682).

Your name was given to me by [Insert name of evaluator] as someone they think of who practises reflection and critical thinking, and promotes evaluation among their colleagues. I am emailing to invite you to be part of my study titled: 'Understanding evaluation champions in culturally diverse not-for-profit organisations.'

The purpose of this study is to understand how champions promote evaluation within not-for-profit organisations. This includes exploring how champions think about evaluation, interact with their colleagues and work towards embedding evaluation. In this research, 'evaluation' refers to how organisations assess their performance against strategic ambitions, how they assess their programs and services and/or how they learn and improve on an ongoing basis. This study will develop an in-depth description and practical strategies to support evaluation champions.

Participating in the study would involve a face to face or web-link interview. The approximate time commitment is one hour. You will be able to choose a time and location that is convenient and safe. The interview will be recorded and you will have an opportunity to review the transcript to remove, add or clarify any information.

I have attached some more information about the study but if you have any questions or require more information about the study itself, don't hesitate to email me arogers1@student.unimelb.edu.au or call (+61 448227422).

If you would like to participate, please email or call and we can make a time & place for the interview that is convenient for you.

Regards,

Alison Rogers

Recruitment flyer

Evaluation Champions

may...

Plain language statement – Interviewees

Project: Understanding evaluation champions

Dr Amy Gullickson (Responsible Researcher)
Tel: 03 9035 9682 Email: amy.gullickson@unimelb.edu.au
Alison Rogers (PhD student) Email: arogers1@student.unimelb.edu.au

You are invited to participate in a study on evaluation champions being conducted by PhD student Alison Rogers under supervision of Dr Amy Gullickson.

Evaluation champions are organisational employees that use reflection and critical thinking skills in their practice, and promotes evaluation amongst their colleagues. The purpose of this study is to understand how champions promote evaluation within culturally diverse not-for-profit organisations. This includes exploring what motivates champions to include evaluation in their everyday practice, interact with their colleagues and work towards embedding evaluation. In this research 'evaluation' refers to how organisations assess their own performance to see if they are achieving their strategic ambitions, how the organisations assess the programs and services that they deliver and/or how the organisations develop systems to learn and improve on an ongoing basis. This study will develop an in-depth description and practical strategies to support evaluation champions.

What does the study involve?

The first phase is a face to face or interview via the internet. The approximate time commitment is one hour. You will be able to choose a time and location that is convenient and safe. The interview will be recorded and you will have the opportunity to review the transcript to remove, add or clarify any information.

Four case studies will be conducted as part of the second phase and this is only relevant for participants and organisations that would have the time and be willing to be involved. There is no obligation to participate in the second phase of the research, a case study, following the initial interviews.

What questions will I be asked in the interview?

The guiding interview questions will be available prior to the interview and some examples of activities that may be indicative of the behaviours of evaluation champions are attached to this letter.

What would the case study involve?

If you and your organisation were willing to be part of a case study, it would involve providing access to documents, site visits and arranging interviews with other staff members and key stakeholders such as external evaluators. The documents could include, but not be limited to, evaluation reports, presentations, board reports, meetings of minutes and donor reports. This data collection phase could occur as part of a site visit. A protocol for the case study would be jointly negotiated prior to commencement.

How do I participate in the study?

To participate, please email Alison Rogers (arogers1@student.unimelb.edu.au). She will reply to make a time and place for the interview that is convenient for you.

What will happen to the information I give you?

Alison and I are the only people who will have access to the information gathered from the interviews. Alison will keep all your information on a password-protected computer. Alison will do everything she can to protect your anonymity and the confidentiality of your information. The regulations of the university mean that she will keep all the data for a minimum of five years. After that it will be destroyed.

What if I say yes, then I change my mind?

Involvement in the study is voluntary. If at any time you wish to withdraw from this project, you can let Alison know and she will not use your information.

Will I receive information about the research findings?

You will be sent a summary of the interview findings and overall findings when they are completed. Information about evaluation champions may be useful for yourself and your organisation. It is anticipated that information about the practicalities of these roles in not-for-profit organisations could be of interest.

Where can I get further information?

If you have any questions or require more information about the study itself, you may contact Alison Rogers (Email: arogers1@student.unimelb.edu.au) or Amy Gullickson (email: amy.gullickson@unimelb.edu.au or phone 03 9035 9682)

This research project has been approved by the Human Research Ethics Committee of The University of Melbourne. If you have any concerns or complaints about the conduct of this research project, which you do not wish to discuss with the research team, you should contact the Manager, Human Research Ethics, Office for Research Ethics and Integrity, University of Melbourne, VIC 3010. Tel: +61 3 8344 2073 or Email: humanethics-complaints@unimelb.edu.au All complaints will be treated confidentially. In any correspondence, please provide the name of the research team or the name or ethics ID number of the research project.

Please keep this information sheet for your records.

Thank you for your time and consideration.

Sincerely,

Dr Amy Gullickson (Supervisor)

Email: amy.gullickson@unimelb.edu.au

Alison Rogers

Email: arogers1@student.unimelb.edu.au

HREC: 1647875; **Date:** 2017; **Version: 1.3**.

Plain language statement – Case studies

Centre for Program Evaluation, Melbourne Graduate School of Education

Project: Understanding evaluation champions

Dr Amy Gullickson (Responsible Researcher)
Tel: 03 9035 9682 Email: amy.gullickson@unimelb.edu.au
Alison Rogers (PhD student) Email: arogers1@student.unimelb.edu.au

What is this research about?

Your organisation is invited to participate in a study on evaluation champions being conducted by PhD student Alison Rogers under supervision of Dr Amy Gullickson. Evaluation champions are organisational employees that use reflection and critical thinking skills in their practice and promotes evaluation amongst their colleagues. The purpose of this study is to understand how champions promote evaluation within culturally diverse not-for-profit organisations. This includes exploring what motivates champions to include evaluation in their everyday practice, interact with their colleagues and work towards embedding evaluation. In this research 'evaluation' refers to how organisations assess their own performance to see if they are achieving their strategic ambitions, how the organisations assess the programs and services that they deliver and/or how the organisations develop systems to learn and improve on an ongoing basis. This study will develop an in-depth description and practical strategies to support evaluation champions.

What is the purpose of the case study?

The first phase of the overall study involved interviews with evaluation champions. These interviews assisted with identifying case study sites for the second phase. The case studies will assist with finding more information that supports what was said in the initial interviews, describing the organisational context and comparing the experiences of champions across sites.

The purpose of the case study is to explore how employees interact around evaluation and consider what has happened as a result of the focus on evaluation. The overarching questions that will guide the case study include: 1) How have employees within this organisation engaged with each other around evaluation? 2) What has happened since there has been a focus on evaluation?

What does the case study involve?

If your organisation was willing to be part of a case study, it would involve jointly developing a case study protocol template, advising on any organisational protocols required, providing access to documents, organising a site visit and arranging interviews with other staff members and key stakeholders such as external evaluators. The documents could include, but not be limited to, evaluation reports, presentations, board reports, meetings of minutes and donor reports. The maximum cost to the organisation will be up to 15 hours (2 days) over a period of 1 month and will involve up to 6 employees. This includes an approximate time commitment for the employees being interviewed of a maximum of 2 hours.

What will the organisation be asked to do?

A protocol for the case study would be jointly negotiated prior to commencement. The purpose of the protocol template is to outline the standard approach that will be undertaken at each of the case study sites. Jointly negotiating the protocol will mean your organisation can include specific organisational requirements and expectations. The finalised protocol will provide a guide for

interaction between the researcher and the organisational representatives throughout the study. The guiding interview questions and data collection procedures are included in the 'Case Study Protocol' template attached to this letter.

How does the organisation participate in the study?

A person in a leadership position is required to write and sign a letter of endorsement indicating approval to participate. It can be emailed to Alison Rogers (arogers1@student.unimelb.edu.au). She will reply to begin negotiations to finalise the case study protocol for your organisation. The research will follow all local organisational requirements for obtaining consent for conducting the research based on the advice of the organisational leaders.

What are the possible benefits?

Information about evaluation champions may be useful for the organisation for recruiting, supporting and retaining individuals with these characteristics. It is anticipated that information about the practicalities of these roles in not-for-profit organisations could be of interest and the summary report may valuable for organisational development.

What are the possible risks?

There is a risk that discussing evaluation could raise sensitive topics, a potential for confidentiality to be breached and a risk of inconvenience. To minimise these risks, the interviewees can choose a time and location that is convenient and safe. The interview will be recorded and they will have the opportunity to review the transcript to remove, add or clarify any information. All information from individuals will not be able to be identified and all references to the organisation will be anonymous.

What will happen to the information that is provided?

Alison and I are the only people who will have access to the information gathered from the case study. Alison will keep all your information on a password-protected computer. Alison will do everything she can to protect the anonymity of participants and the confidentiality of the information. The regulations of the university mean that she will keep all the data for a minimum of five years. After that it will be destroyed.

What if the organisation says yes, then we change our mind?

Involvement in the study is voluntary. If at any time the organisation wishes to withdraw from this project, you can let Alison know and she will not use your information.

Will I receive information about the research findings?

The individual participants will be sent a summary of their interview findings and overall findings when they are completed. The organisation will receive a summary report with results of the document analysis in combination with the analysis of the interviews. An oral presentation of the findings can also be delivered by the researcher if desired.

Where can I get further information?

If you have any questions or require more information about the study itself, you may contact Alison Rogers (Email: arogers1@student.unimelb.edu.au) or Amy Gullickson (email: amy.gullickson@unimelb.edu.au or phone 03 9035 9682)

Who can I contact if I have any concerns about the project?

This research project has been approved by the Human Research Ethics Committee of The University of Melbourne. If you have any concerns or complaints about the conduct of this research project, which you do not wish to discuss with the research team, you should contact the Manager, Human

Research Ethics, Office for Research Ethics and Integrity, University of Melbourne, VIC 3010. Tel: +61 3 8344 2073 or Email: humanethics-complaints@unimelb.edu.au All complaints will be treated confidentially. In any correspondence please provide the name of the research team or the name or ethics ID number of the research project.

Please keep this information sheet for your records.

Thank you for your time and consideration.

Sincerely,

Dr Amy Gullickson (Responsible Researcher)

Email: amy.gullickson@unimelb.edu.au

Alison Rogers

Email: arogers1@student.unimelb.edu.au

Consent Form – Interviewees

Understanding evaluation champions in culturally diverse not-for-profit organisations.

1. I consent to participate in the research 'Understanding evaluation champions in culturally diverse not-for-profit organisations'. The details of the project have been fully explained to me in the Plain Language Statement.
2. The student researcher is Alison Rogers at the PhD level. The responsible researcher / supervisor is Dr Amy Gullickson at the Centre for Program Evaluation, Melbourne Graduate School of Education, University of Melbourne (amy.gullickson@unimelb.edu.au 03 9035 9682).
3. I acknowledge that:
    a. The possible uses of the information arising from the study have been explained to me to my satisfaction.
    b. I have been informed that I am free to withdraw my consent for participation at any time and to withdraw any identifiable unprocessed data previously supplied.
    c. The research is for the purpose of Alison Rogers' dissertation.
    d. The interview will be recorded and I will have the opportunity to review the transcript to remove, add or clarify any information.
    e. I have been informed that the confidentiality of the information provided in the study will be safeguarded in the following ways:
        - No names or personal details of individual participants will be revealed in the thesis, or any other papers produced as part of the thesis (e.g. journal articles, conference presentations).
        - Only Alison Rogers and Amy Gullickson will have access to the data collected in this study.
        - Data collected will be stored securely in a password-protected file accessible by the researchers for five years from the completion of the thesis.
        - Once signed and returned, a copy of this consent form will be retained by Alison Rogers.

Name _____Participant's signature _____
Date_____

Consent obtained by:

Name _____ Signature of researcher _____
Date_____

HREC: 1647875; **Date:** 2017; **Version: 1.3**.

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Consent Form – Case Study Participants

Understanding evaluation champions in culturally diverse not-for-profit organisations.

1. I consent to participate in the research 'Understanding evaluation champions in culturally diverse not-for-profit organisations'. The details of the project have been fully explained to me in the Plain Language Statement and in the Case Study Protocol.
2. The student researcher is Alison Rogers at the PhD level. The responsible researcher / supervisor is Dr Amy Gullickson at the Centre for Program Evaluation, Melbourne Graduate School of Education, University of Melbourne (amy.gullickson@unimelb.edu.au 03 9035 9682).
3. I acknowledge that:
    a. The possible uses of the information arising from the study have been explained to me to my satisfaction.
    b. I have been informed that I am free to withdraw my consent for participation at any time and to withdraw any identifiable unprocessed data previously supplied.
    c. The research is for the purpose of Alison Rogers' dissertation.
    d. The interview will be recorded and I will have the opportunity to review the transcript to remove, add or clarify any information.
    e. I have been informed that the confidentiality of the information provided in the study will be safeguarded in the following ways:
        - No names or personal details of individual participants will be revealed in the thesis, or any other papers produced as part of the thesis (e.g. journal articles, conference presentations).
        - Only Alison Rogers and Amy Gullickson will have access to the data collected in this study.
        - Data collected will be stored securely in a password-protected file accessible by the researchers for five years from the completion of the thesis.
        - Once signed and returned, a copy of this consent form will be retained by Alison Rogers.
4. (Optional) I consent to my organisation presenting, publishing or sharing identifiable information from the case study report related to this research in the public domain in collaboration with the researcher.

Name_____ Participant's signature _____Date_____

Consent obtained by:

Name_____ Signature of researcher _____Date_____

HREC: 1647875; **Date:** 2017; **Version: 1.3**.

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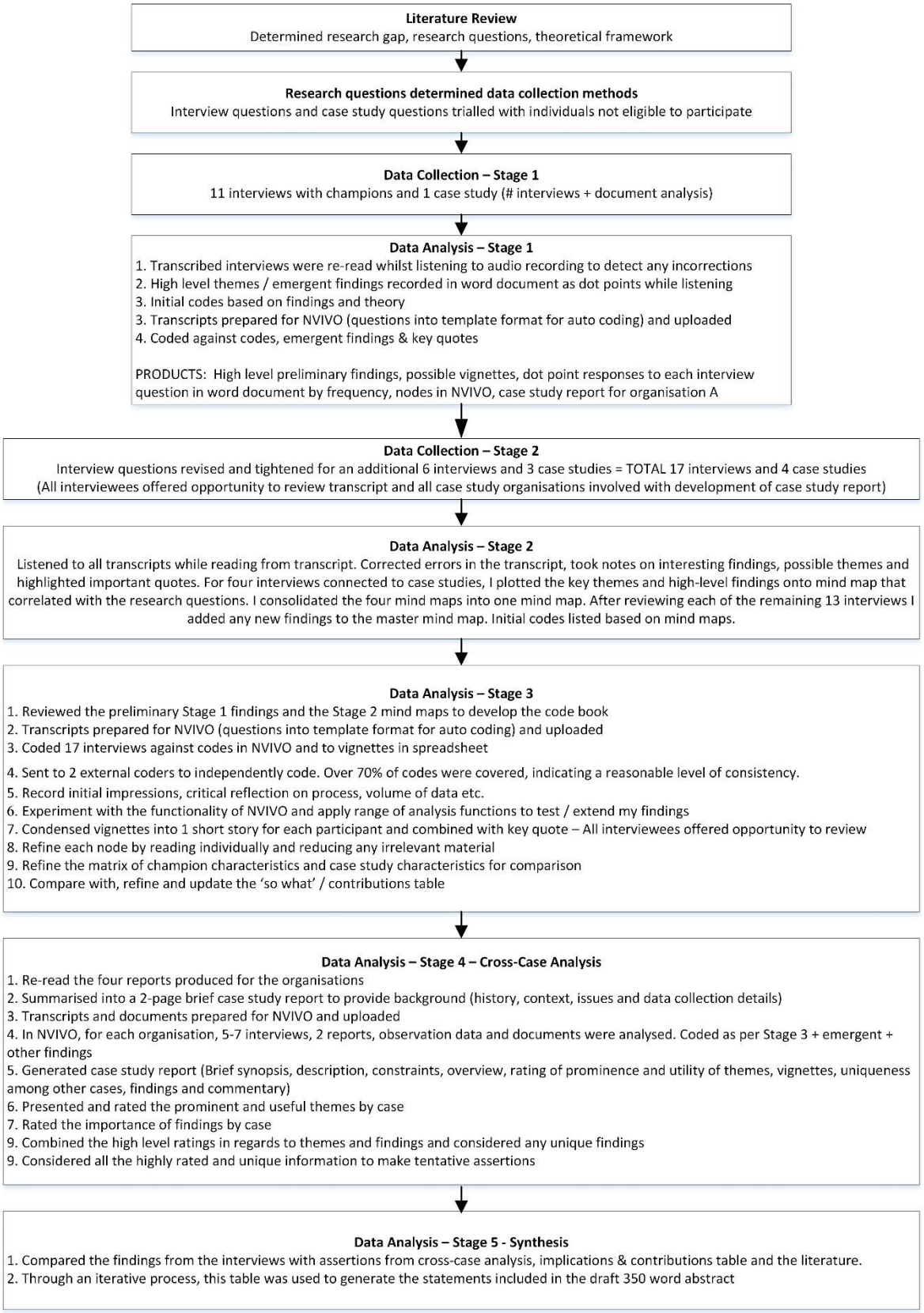
Appendix E

A detailed overview of the iterative data collection and analysis process



Appendix F

Ethical issues and mitigation strategies

Ethical Issues	Mitigation Strategy
Rights, respect, and recognition	I endeavoured to foster respectful and ethical research relationships. I acknowledged that everyone had a right to their own values, norms, aspirations, and worldviews. I attempted to be culturally humble. This meant creating a space for self-reflection and carefully considering assumptions and beliefs. I was willing to acknowledge and suspend any initial judgements about a person or group based on cultural generalisations. In relation to the case studies, the development of the organisational report actively engaged staff, including interpretation of the document analysis and determining overarching findings from the interviews.
Negotiation, consultation, agreement, and mutual understanding	At all stages of the research there was ongoing consultation and negotiations to ensure free, prior, and informed consent. I maintained this at both the organisational level and at the individual level. The research topic was in alignment with the priorities of many non-profit organisations. Explaining the purpose of the research and ensuring that there were links to the organisation's efforts to develop evaluation capacity, was addressed prior to undertaking the case study. The research investigated ways that evaluation could support the achievement of organisational goals. An organisational case study protocol was jointly negotiated to achieve mutual understanding about the proposed research. This provided an opportunity for me to develop trust and a meaningful research partnership. The protocol clearly explained the purpose and nature of the study, the objectives and methods, roles and responsibilities, timelines, cultural protocols, a risk assessment, and the likely impacts, and consequences of the research, including production of research outputs and publications. Within the case study I acknowledged the cultural distinctiveness of different communities and undertook respectful methods. The research questions and methods focused only on workplace interactions.
Participation, collaboration, and partnership	The methods were appropriate to answer the research questions and placed minimal burden on participants. I did not anticipate that the project would cause harm to any participants. Data collected during the project was not of a sensitive nature and did not include any personal health or financial data. Individual participants within the organisations had information about the research, the questions, and were provided with an opportunity to review the transcript and report. I liaised with the organisational representative to identify any potential negative consequences and minimise the risk prior to commencement. I had previous expertise working in this context and had undertaken similar research without any negative consequences. I was aware of the cultural and political implications and sensitivities surrounding research undertaken in Aboriginal and Torres Strait Islander communities. I was responsible and accountable to the organisation as well as to the research participants.

Ethical Issues	Mitigation Strategy
Benefits, outcomes, and giving back	Organisations involved with the case studies received a summary report with results of the document analysis in combination with the analysis of the interviews. I made an offer to present the findings to the organisations through an oral presentation. It was my intention for the report and presentation to contribute to increasing the understanding among decision makers in non-profit organisations about the characteristics, motivations, and interactions of evaluation champions so that the roles could be more effectively recruited, supported, and retained. I also assisted the organisations to formulate proposals for further research or plan for organisational development actions based on the findings from the research and developed a report answering a specific question for the organisation so it was useful, meaningful, and contributed to the organisation's overarching goals. Thereby, enabling a mutually beneficial partnership.
Managing research: use, storage, and access	The organisation decided who needed access to the research results that arose specifically from the organisation. The organisation determined if, when, and how the final report or a subsequent version was used. All references to the organisation in the thesis have been made anonymous.
Reporting and compliance	There was a small risk of anonymity being breached due to the small size of the organisations. I made every attempt to avoid this from occurring by de-identifying participants and using only aggregate results. The confidentiality and anonymity of responses was upheld by using pseudonyms, coding, and changes to other identifying information that was applied to the transcripts before analysis. The challenges of anonymity and confidentiality in an organisational context were addressed by giving the individual organisations a specific pseudonym (Organisation A, B, C or D). All references to the organisation, colleagues and evaluators in the thesis were made anonymous.