



Evaluation capacity building (ECB) interventions and the development of sustainable evaluation practice: An exploratory study

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ABSTRACT

Evaluation capacity building (ECB) is a practice that can help organizations conduct and use evaluations; however, there is little research on the sustainable impact of ECB interventions. This study provides an empirical inquiry into how ECB develops sustained evaluation practice. Interviews were conducted with 15 organizational leaders from non-profits, higher education institutions, and foundations that “bought in” to ECB and were at least six months removed from an ECB contract. The result of this work highlights how sustained evaluation practice developed over time and what these practices looked like in real-world settings. A developmental, iterative cycle for how ECB led organizations to sustain evaluation practice emerged around key components to sustainability. First, leadership supported ECB work and resources were dedicated to evaluation. Staff began to conduct and use evaluation, which led to understanding the benefits of evaluation, and promoted value and buy-in to evaluation among staff. Common barriers and emerging sustainability supports not previously identified by ECB literature—the “personal” factor and ongoing ECB practitioner contact—are described. Practical tips for ECB practitioners to promote sustainability are also detailed.

1. Introduction

Many organizations are required to conduct evaluations that take considerable time, resources and expertise (Andrews, Motes, Floyd, Flerx, & Lopez-De Fede, 2006; Chinman et al., 2008; Huffman, Thomas, & Lawrenz, 2008; King, 2002; Miller & Lennie, 2005). Organizations with limited resources struggle with evaluation and reporting to their funders (Carman, 2007). This struggle means that organizations are barely able to gather and report data, much less think about it and use it for program improvements and organizational growth (Author(s) (2015); Author(s) (2016)). Evaluation capacity building (ECB) is a potential solution to this problem. In the first definition of ECB, Baizerman, Compton, and Stockdill (2002) defined ECB as “... the intentional work to continuously create and *sustain* overall organizational processes that make quality evaluation and its uses routine” (p. 109, emphasis added). Thus, ECB is historically connected to sustainability.

Sustainability can be defined as “maintaining well-being over a long, perhaps even an indefinite period” (Kuhlman & Farrington, 2010;). Costanza and Patten (1995) defined a sustainable system as “one which survives or persists” (p. 193) and argued that defining sustainability is a question of predicting what will last and achieving

consensus on what we want to last. Preskill and Boyle (2008) identified sustainable evaluation practice as “what should last” and defined it as the ongoing, routine conduct and use of evaluation in organizations, “where members continuously ask questions that matter; collect, analyze, and interpret data; and use evaluation findings for decision-making and action” (p.2). This definition guided this study. In the remainder of the article, we use the terms sustainability and sustainable evaluation practice interchangeably.

2. Literature review

2.1. Sustainability in ECB research

Research on ECB has advocated for empirical research on the sustainable, long-term impact of ECB (Bourgeois, Chouinard, & Cousins, 2008; Cousins & Bourgeois, 2014) but a meta-synthesis of the empirical ECB literature did not address these concerns (Labin, Duffy, Meyers, Wandersman, & Lesesne, 2012). We reexamined the articles in the Labin et al. (2012) study, in addition to articles published since the study. We searched for sustainability terms (Savaya, Spiro, & Elran-Barak, 2008): *sustain* (-able, -ability), *continue* (-s, -ed) *integrate* (-tion), *incorporate* (-tion), *routine* (-ization, -ize), *maintain* and *maintenance*.

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Over 75 articles were screened; 50 contained sustainability terms. Of these, only three articles provided anecdotal evidence and six articles utilized systematic inquiry, such as survey or interview methods, of sustainability (Campbell et al., 2004; Carden & Earl, 2007; Katz, Sutherland, & Earl, 2002; MacLellan-Wright, Patten, Cruz, & Flaherty, 2007; Nagao, Kuji-Shikatani, & Love, 2005; Taut, 2007). Common follow-up protocol was six months to one year after the ECB effort. In all cases, the follow-up was not the central focus of the article.

These six articles provided encouraging results; each article suggested that evaluation practice was sustained as a result of the ECB intervention. Nagao et al. (2005) conducted a six-month follow up survey of schools that participated in ECB and found that many schools continued conducting evaluations, but felt that they needed ongoing support and coaching. Campbell et al. (2004) found that a year after ECB work, 80 % of organizations still conducted evaluations and altered their programs, curriculums, or evaluation tools as a result. Similarly, MacLellan-Wright et al. (2007) did a six-month interview follow-up with workshop participants who created an evaluation framework and found that as a result of the ECB process participants used the framework to engage in dialogue with Board members, funders, and used it to write grants and reports. Carden and Earl (2007) conducted one-year follow-up interviews and found that the ECB process sustained reflection and evaluative thinking. Katz et al. (2002) also reported a sustained “evaluation habit of mind” in certain ECB participants (p.111). Taut (2007) found in a six-month follow-up that some participants were still thinking evaluatively, while others had ceased the practice. These studies revealed three specific sustained evaluation practices: (1) conducting evaluations, which included revisiting and refining tools and processes, (2) using evaluations, which included discussions about data for programming and funding, and (3) thinking evaluatively. Because evaluative thinking is an emerging area for evaluation research (Vo & Archibald, 2018), it warrants additional explanation. Evaluative thinking is “critical thinking applied to the context of evaluation” (Buckley, Archibald, Hargraves, & Trochim, 2015, p. 376) and it is considered critical to the ECB process, as evaluators teach others to think about and apply evaluation concepts to their work (Vo, Schreiber, & Martin, 2018). There was no empirical discussion of how these practices were supported and developed over time.

2.2. Sustainability in ECB models

Although the empirical literature demonstrates whether organizations may be sustaining evaluation, this literature provides a limited understanding regarding supports for sustainability. To identify supportive factors, we turned to ECB models (Alaimo, 2008; Baizerman et al., 2002; Bourgeois & Cousins, 2008, 2013; Cousins, Goh, Clark, & Lee, 2004; Huffman et al., 2008; King & Volkov, 2005; Labin et al., 2012; Nielsen, Lemire, & Skov, 2011; Preskill & Boyle, 2008; Suarez-Balcazar et al., 2010; Taylor-Powell & Boyd, 2008; Tseng, 2011) and organizational change theories (Armenakis & Bedeian, 1999; Boyce, 2003; Buchanan et al., 2005; Ely, 1990; Kotter, 1995; Rogers, 1995). Only supports mentioned in both literatures were included in the table. All definitions in the table below are based on the authors blending key components of the definitions provided from these theories and models. The results of this review are found in Table 1.

Several supports for sustaining evaluation practices were common across the two theoretical bases. *Leadership* needs to be supportive of change and/or an evaluation champion needs to emerge to advocate for and facilitate changes in evaluation practice. Organizational *culture* needs to be open to change, value learning, and adopt to change in positive and support ways. Change in practice needs to be *communicated* effectively to develop consensus expectations and organizations need to promote *learning* to help staff to nurture and improve staffs’ skills. *Resources*, such as investments of time, money, and personnel need to be allocated to learning and improving evaluation practice. These changes must be *aligned to mission and values* of the organization, which

helps perpetuate the change and situate it within the organization’s core mission. Moreover, organizations need to *understand the benefits* of the change and see how it will positively impact their work and benefit the organization or program. *Systems and structures* to support and routinize the change effort help sustain practice over time. And finally, *outside supports* such as collaborative funders, learning communities, and broader societal and cultural contexts facilitate a supportive environment for sustainability.

2.3. Research purpose & questions

The purpose of this study was to understand the role of ECB interventions in sustaining evaluation practice. The research question that guided this study was the following: Do organizations that undergo an ECB intervention sustain evaluation practice and if so, how does it developed over time?

3. Methodology

This study used a phenomenological interviewing methodology (Kvale & Brinkmann, 2009) to provide thick, rich description (Finlay, 2012) of sustained evaluation practice and its development for organizations that underwent an ECB intervention.

3.1. Sampling procedure

Snowball sampling was used to identify ECB practitioners (ECBPs) from three distinct threads: local ECBPs in the Chicago area, ECBPs presenting at the 2016 American Evaluation Association (AEA) conference, and prominent ECB researchers. These threads were not necessarily independent; care was taken to not oversample from a thread and ECBPs were evenly represented between each thread. ECBPs were asked to identify one to three leaders from organizations in which they supported ECB. ECBPs were also asked to identify other ECBPs who may be willing to participate in the research.

ECBPs were asked to purposefully select organizational leaders (OLs) based on two criteria:

- 1 They were from organizations that “bought in” and engaged the ECB process, were present during the ECB intervention, and still worked at the organization.
- 2 They were at least 6 months removed from the initial ECB contract.

The first criterion created a purposive sample of OLs who were invested in the ECB process and wanted it to succeed; buy-in was a critical factor because this research aimed to understand the sustainable evaluation practices of ECB interventions via positive case examples, to promote what can be achieved under supportive conditions. (Flyvbjerg, 2006). The second criterion was in line with follow-up studies within the ECB literature (MacLellan-Wright et al., 2007; Taut, 2007). Finally, although turnover is a well-known barrier to evaluation and ECB practice (Author(s) (2015); Taut, 2007), it was necessary that the OL was present during the intervention so they could properly contextualize the impact of the intervention. All ECBPs who connected the authors to OLs were highly trained evaluation personnel, each with either 10+ years of experience practicing ECB and/or a doctorate in the field.

3.2. Sample

Table 2 provides an overview of the 12 organizations in the sample. Fifteen OLs were interviewed and included in this sample, representing a total of 12 distinct ECB interventions. On three occasions (Organization 1, 4, and 7), two people from the same organization were interviewed to get a holistic representation of the ECB intervention. Three OLs had evaluation roles and responsibilities within the organizations.

Table 1
Sustainability Factors based on Organizational Change and ECB Literatures.

Factor	Definition
Leadership/ Champion	Leadership support for the change or an enthusiastic and engaged champion of the change within the organization that helps facilitate and sustain the change.
Culture	An organizational culture that is open to change and makes changes within the organization so it learns to adopt and adapt to the change in positive and responsive ways
Communication	How well the change is disseminated to staff within the organization, the expectations around the change, and communication of supports and help that can be offered to facilitate and sustain the changes.
Learning	An organization must be committed to consistent learning about and from the change.
Resources	An organization must dedicate the necessary resources to support the organizational change. Common resources include time, money, and personnel.
Mission & Values	The changes an organization makes (e.g., sustained evaluation practice) must align and help perpetuate the core mission and values of the organization.
Understanding Benefits	Staff must see and understand how the change positively impacts and benefits the organization. Within an evaluation context, this can include the change's impact on programming and procurement of funding.
Systems & Structures	Systems and structures are needed to support and routinize the change. In evaluation, this includes routinized protocols for data collection and systems for reporting and analysis.
Outside Supports	An organization might need external support to sustain evaluation, such as collaboration with funders, communities of practice with other organizations, or procuring multiple sources of funding for evaluation.

Two of these were trained evaluators with extensive background knowledge and experience in evaluation (OL#2, OL#5); another OL was an “accidental evaluator” and for many years helped the organizations with data collection and reporting (Stevahn, King, Ghery, & Minnema, 2005). The rest of the OLs had no extensive training or experience in evaluation; they were simply champions of ECB who saw its value-added to their organizations.

The organizational sample consisted of higher education institutions, state and national non-profit coalitions, foundations, museums and a community non-profit. OLs were typically Executive Directors, Program Directors, or Program Managers. Organizational size was variable. Some organizations were large institutions, such as a state university or university system, while other organizations consisted of six to seven full time equivalents. These organizations had a breadth of missions and populations served. Higher education institutions served both their faculty and staff, state and national coalitions served the organizations housed within their states and territories that were aligned to their mission, while foundations and non-profits focused on serving their communities via education and the arts.

Eight of the organizations had no formal contract with their ECBP and the ECB intervention was considered finished, although some of them still had informal contact with them via email and phone check-

ins. The remaining four organizations had an ongoing contract with their ECBP, which was a renewal of the initial contract. Nine of the initial ECB contracts were internally driven, which means that the organizations were looking to conduct an evaluation and/or build their evaluation capacity; a funder did not mandate them to seek out evaluation services. A total of three organizations had externally driven ECB services.

ECBPs deeply engaged the OLs and their organizations with evaluation knowledge and skills over an extended period of time. Commonly, ECBPs would convene staff together to plan for program evaluation, hold regularly scheduled meetings to measure progress towards evaluation goals, help organizations navigate evaluation challenges, and encourage and model reflection on evaluation findings, which were then integrated into the next iteration of evaluation. This process of planning, implementing, evaluating, and reflecting required ongoing meetings with leadership and staff throughout the year, and routine check-ins, training, technical assistance, and coaching in between. To do this effectively, ECBPs often ingrained themselves within the organizations and grew to understand the nuances of organizational programs, personnel and culture. For a majority of organizations, this process continued across multiple evaluation cycles. The length of ECB intervention duration ranged from six months to 11 years; however,

Table 2
Sample Characteristics for Organizational Leaders, their organizations, and Evaluation Capacity Building Initiative.

Organization	Interviewee	Organization Type	Organization Size*	ECB Target	ECB Duration (Years)	Years since ECB
Organization #1	OL #1	Museum	6 FTEs, 3 PTEs; 1/3 of organization budget	Department	11	3
	OL #1.1	Museum		Entire Organization	11	3
Organization #2	OL #2	Higher Education	Large public University	Entire Organization	4	2
Organization #3	OL #3	Higher Education	Large public University	Entire Organization	3	Unknown; multiple years
Organization #4	OL #4	Higher Education	Large public University – Department	Departments	12	N/A
	OL #4.1	Higher Education		Department	.75 (9 months)	2
Organization #5	OL #5	Non-profit state coalition	35 FTEs	Entire Organization	2–3 from initial contract	2–3 from initial contract
Organization #6	OL #6	Foundation	11 FTEs	Department	3 years from initial contract	3 years from initial contract
Organization #7	OL #7	Foundation	24 FTEs	Entire Organization	2-4	2
	OL #7.1	Foundation	24 FTEs	Entire Organization	2-4	2
Organization #8	OL #8	Foundation	7-8 FTEs	Entire Organization	3 from initial contract	3 from initial contract
Organization #9	OL#9	Community Non-profit	7 FTEs; 60 PTEs	Entire Organization	0.5 – 1	2
Organization #10	OL #10	Non-profit state coalition	7 FTEs	Entire Organization	2	6
Organization #11	OL #11	Museum	13 FTEs, 20PTEs,	Entire Organization	3	6–7
Organization #12	OL #12	Non-profit, national coalition	50 FTEs	Department	4 from initial contract	4 from initial contract

most of the interventions lasted between two to four years. Eleven of the ECB efforts focused on either the entire organization or an entire department. One higher education institution took an ECB approach to their assessment department.

The time since the ECB intervention was variable. For many organizations, these years represented their best guess, as time eroded their ability to articulate the exact timeframe. Additionally, informal, ongoing relationships with their ECBP after the formal ECB intervention made this a nebulous estimate. For other organizations that had renewed their contracts, the estimates were more precise, as the formal ongoing nature of the work made it easier to recall. The organizations that no longer had formal ongoing contracts with their ECBP had a time range since the ECB intervention of two to seven years. For those with ongoing contracts, time since the initial contract ranged from two to four years.

3.3. Data collection procedures

The first author conducted semi-structured interviews in-person, via telephone or via Skype, which lasted 60–90 min. The interviews addressed the background of the organization (e.g., population served, mission, budget), their experiences with the ECB intervention and any evaluation practices that were created or enhanced as a result of the ECB intervention. Sample interview questions included: 1) What supports are there for evaluation in your organization? 2) How did they develop during the ECB process? 3) Thinking back to before you participated in the intervention, what do you remember evaluation practices being like? 4) What does evaluation practice look like today in your organization?

3.4. Analysis procedure

The first iteration of analysis involved open and closed coding, rooted in the empirical and theoretical literature on ECB and organizational change. Over 50 codes were identified. Next, the first author began to collapse and categorize codes into themes, using the framework of sustained evaluation practices and supports (see Table 1). During this process, the first author had ongoing dialogue with multiple critical friends to organize the codes into cohesive themes. Two themes emerged that were not evident in this framework—evaluative thinking and the personal factor—although evident in the evaluation literature. Finally, the first author compared and contrasted patterns of themes across the organizations and explored patterns in the relationships between themes. Given the nature of this study, it was not possible to confirm causal links between ECB and sustainability, but considering relationships between themes was critical for understanding how ECB contributed to sustainability.

To ensure validity, the interview process involved frequent member checks with the OLs; when necessary, follow up member checks were also conducted via e-mail. The author(s) and critical friends reviewed the patterns and engage in collaborative discussions to arrive at consensus. A reflexive journal, and internal memos were leveraged to ensure consistency and credibility of results.

4. Results

All OLs described how the ECB intervention helped their organization to improve their ability to routinely conduct evaluations, use them and develop evaluative thinking. The quality and frequency of these practices, however, was largely dependent on the existing and/or developing sustainability supports. For example, staff turnover and unstable resources were identified as key impediments to sustainability. Three organizations that experienced these issues saw a lower quality and frequency of sustained practice and many were fearful these issues could arise in the future.

A common developmental, iterative process emerged across

organizations. First, *leadership* was supportive of evaluation and advocated for building the organization's evaluation capacity. As a result, leadership dedicated *resources* to evaluation, such as hiring a consultant and investing in proper technology and personnel training. With these resources in place, organizations were able to *conduct evaluations, use evaluations*, and develop *evaluative thinking*, which was bolstered by the *personal factor* of the ECB practitioner. Once evaluation findings were used, staff were able to *understand the benefits of evaluation* to the organization and began to *buy-in* and value it. This buy-in then reinforced support for evaluation among leaders, which perpetuated this cycle. Organizations engaged in multiple iterations of this cycle. Although the ECBP provided extensive supports during initial cycles, overtime the involvement of the ECBP either ended or lessened in the organizations. Given the retrospective nature of this study, it was not possible to identify how many iterations of the cycle occurred in an organization and the level of ECBP involvement at various iterations. In the sections that follows, we describe each element in this cycle. Within these descriptions, we have also included what OLs described based on their recollection of the ECB interventions, as well as their current practices in the organization.

4.1. Leadership

Leadership was a primary support for sustainability. Nine organizations were internally driven by leadership to seek out ECB work. In these cases, the leaders understood that there was a need for evaluation within their organization and/or they needed help with their existing evaluation practices. Four sources of leadership for evaluation were identified in organizations: (1) Board involvement, which described how Board members were involved in and supportive of evaluation (four organizations); (2) supportive Executive Directors, who provided resources for evaluation, but were not engaged or explicitly enthusiastic about evaluation (four organizations); (3) Executive Directors who bought-in, meaning that they were fully engaged in evaluation (eight organizations); and (4) Staff champions, who were staff members in leadership roles who were engaged with, and advocated for, evaluation within the organization (12 organizations).

The ECB process helped develop or empower *evaluation champions* that valued, owned, and advocated for the evaluation. For organizations without an internal evaluator, this champion was developed through the ECB process. For those with an evaluator, ECB empowered them to be vocal about evaluation. It was unclear in interviews how explicitly ECBPs cultivated these leaders into champions; however, it was clear that the ECB process itself emboldened these leaders to be more vocal and advocate for evaluation more than prior to the intervention. Due to the sampling frame, the finding that evaluation champions were cultivated and empowered through the ECB process is not surprising; however, the degree of their enthusiasm, buy-in and productivity around evaluation is nevertheless a strong indication that ECB efforts can have lasting effects. For example, OL#12 described how the ECB process developed buy-in. "But I think that [organization] have really grown [in evaluation buy-in and capacity] and I think that that's due to really I think due to [ECB work]." Also, OL#12 described the degree to which champions were advocates for evaluation. "I am kind of an evangelical evaluation person, I am like listen this is why we need to care about it and we try to always connect it back to it." Here there is a connection between ECB laying the groundwork for people to understand the need for evaluation and how a champion preaches its benefits to staff.

Evaluation champions were particularly powerful at the board-level: "So with [member's] leadership on the board...[member] spoke with staff about...evaluation...so we dedicated a staff person at the time to get on board, learn as much as you can...and so we decided as a leadership team to invest in our resources [in evaluation]." (OL#7.2). This demonstrates how evaluation champions helped to facilitate evaluation practice; they constantly advocated for evaluation among staff.

Data showed that having an evaluation champion, somebody in a leadership position who valued, advocated, and took on evaluation responsibilities, was essential to facilitating and developing sustainability. In most organizations, there was no full-time evaluator; thus, it was imperative that either one person took on evaluation responsibilities, or that all staff played a role in evaluation. This type of structure made it critical that a champion for evaluation emerge, because without somebody willing to take on the extra responsibility, set an example, and advocate for evaluation, it may not have been possible to sustain evaluation efforts.

Turnover and potential turnover of key evaluation personnel was the main source of anxiety for organizations around sustainability. This sample consisted of organizations that were relatively stable and experienced mild turnover; in most cases leadership remained stable and/or the champion for evaluation remained at the organization, which helped evaluation continue to flourish. Two organizations experienced turnover issues that affected their evaluation growth and progress. Although real turnover was an issue, the fear of *potential* turnover was most commonly related to the instability of evaluation within organizations.

4.2. Resources

All organizations continued to dedicate resources to evaluation to support sustained evaluation practice after the ECB intervention. *Technology resources* were invested in five organizations. Technological investments involved databases, Survey Monkey accounts, Excel workbooks for data entry and analysis, a program dashboard, and investments in iPads for visitors to fill out surveys.

Personnel resources were discussed by eight organizations. Investing in personnel resources involved changing job descriptions and roles, hiring personnel for newly formed evaluation-related positions, and creating an evaluation committee within the organization. These categories were not independent of each other in the organizations. OL#12 provided a strong example of personnel resources, "...And then also we have built it into job descriptions. It is in at least two job descriptions and then we are currently creating a position for an evaluation coordinator..." Changing job descriptions and roles to include evaluation was the most common personnel investment, which was evident in six organizations. In three cases, this involved a staff member who worked closely with the ECBP to take over evaluation responsibilities and had their job description changed to accommodate these new responsibilities. In another three cases, organizations decided to add it into job descriptions because they wanted all staff to have familiarity with evaluation. In a more drastic change, three organizations created a new position, or hired an intern, whose sole responsibility was evaluation; another organization was planning to hire an evaluation coordinator in the future. An organization also convened an evaluation committee that was responsible for creating evaluation protocols and procedures for the organization.

Monetary resources related to evaluation were present in eight organizations and took multiple forms. Four organizations renewed their contract with their ECBP and continued to work with them due to the positive results they saw over time. Additionally, three organizations found the money to invest in consultants for external evaluation work, workshops, or logic modeling: "...So in our budgets...we have a line item for consultant evaluation" (OL# 7.2). Three organizations described how they budgeted for evaluation as a line item either for grant proposals or within their organizational budget. Two organizations also invested in professional development, finding resources to send their staff to trainings, professional development opportunities and/or the American Evaluation Association (AEA) conference: "We write stuff into our grant now... we commit in our grant to attend the [AEA] conference" (OL#12). The support of *learning* was usually discussed in terms of monetary resources, and rarely described as a critical driver of sustainability.

Lack of resources was also identified as an impediment to sustaining evaluation practices. Many organizations wished to continue their ECB work and find a full-time evaluator but they did not have the funds to do so. For example, one organization did not have the extra funds to continue their ECB work and met with their ECBP on a pro-bono basis. Because of this, it became difficult to have consistent ECB work, which affected the organization's ability to sustain evaluation practices. Similarly, in two other cases, once the grant ended the ECB efforts were curtailed; as a result, the quality and frequency of evaluation conduct, use, and thinking were diminished.

4.3. Conducting evaluations

Every OL discussed ongoing and improved conduct of evaluation within their organization. Eight organizations discussed the creation and/or refinement of *logic models/theories of change*, to guide their evaluation process. Eleven organizations reported that *evaluation tools* were created or refined and that ECB interventions helped bolster their data collection and analysis. In most cases, this was the most direct result of the ECB process, as the ECBP worked with the organizations to create logic models, create or refine tools (e.g., surveys, focus group protocols), and create a protocol for data collection and analysis. The organizations then continued to use and refine these tools to conduct their evaluations. For example:

It's like night and day. Before we were struggling just to do, we called it our technical assistance satisfaction survey that was it... We now have about 4 or 5 different measurement tools that we are using for various areas of our work.... and we have a database that we put that information into, we are able to easily pull that data for reports or meetings.... and we talk about building a logic model... what are you trying to capture?...Our knowledge internally has changed. (OL #12).

Eleven OLs described how their organization sought out an ECBP who could routinize a *system and structure* for collecting, analyzing and reporting evidence within the organization. Initial systems were developed for organizations; however, many continued to struggle with analysis and reporting, and they were not routinized within the organization because there were not key individuals with the expertise necessary to systematize the evaluation process. Only one organization discussed a fully routinized evaluation system, which was an organization with an in-house evaluator prior to the ECB effort and a Board of Directors actively engaged with evaluation. With the help of the ECBP, the organization set up evaluation protocols with staff input, creating wide agreement. Then, the ECBP created an automated report which helped the internal evaluator set up an improved system for data feedback. The internal evaluator would then use this report to create feedback loops to staff so they could use the data in real-time.

4.4. Using evaluation findings

Once organizations conducted evaluations, they put it to use; all twelve organizations reported consistent use of findings as a result of ECB. There were two categories of use described: (1) use for feedback and program improvement, and (2) use for development purposes. Ten organizations reported that they used data to reflect and think about how to improve their programs. For example, "...but then bringing [staff] in and together working with the data to say what we are learning from this" (OL #6) and "So after an event... we would put together some sort of document that would capture all of that information so we could use it for next year's event to make the decision of whether or not to continue a program based on those results." (OL#11). In some instances, these data points provided large-scale changes to programs. For example, one organization revamped their entire staff onboarding process, and a foundation created a new grant making fund as a result of evaluation findings. Five organizations spoke

about how feedback loops helped cultivate an environment that was conducive to evaluation use. *Communication*, which was identified as a key support for sustained evaluation practice, overlapped with *use for feedback and program improvement*; most organizations communicated changes by bringing staff together to discuss evaluation findings.

Six organizations mentioned use for *development purposes*, which included (1) using evaluation data for new grants and proposals, (2) feeding data and reporting back to funders, and (3) procuring grant money because of evaluation data. "...[Evaluation] makes it easier for me to have conversations with our officials who are major funders for us, as well as one of our corporate donors who say, 'you know, great looks nice but what's the impact that you are really having on this community?' So it's a huge tool for those kinds of conversations" (OL #11). Four organizations reported that they used data for new grant proposals and shared their evaluation findings with their development department, while one organization attributed getting new grant money as a result of evaluation data. Four organizations noted that data helped them quantify their successes to their funders and eased the reporting process.

4.5. Evaluative thinking

Evaluative thinking as a result of ECB was described in every organization. Nine organizations described how staff used data to reflect on their programs and inform decision making. Reflection often overlapped with using data for feedback and program improvement, but it focused on the critical reflection process of making data useful rather than specific instances of use. For example, "...qualitative data tells the best story and accurately tells the best story about what happens when the rubber meets the road, how do you use that to inform your program?" (OL #3) and "[data] necessarily changes [the teachers'] views of the students and it gives [the teachers] ideas of how they can improve their own teaching and makes them more interested in working with others to improve the program" (OL #5). These quotes illustrate how organizations used the evaluation process to reflect critically on their programming and think about how they could learn from their work.

The ECB process also helped three organizations to reflect on how programs aligned to the mission and values of the organization. "...sometimes we get about the work and executing some of those tactical things about the vision and then we have to remember, but what is our theory of change for public humanities? How does this roll up to our larger mission? It's a great thing to do but is it a one-off? How does it further the five goals?" (OL #7.2). Here, the evaluation process helped this organization to think about whether and how a program contributed to the overall mission and values of the organization; evaluation was a tool that facilitated reflection on key values of the organization and mitigated scope creep.

After organizations got used to ongoing evaluation and how to do it properly, eight OLs reported staff that integrated the evaluation process into other work. Here, staff applied evaluation in other areas of the organization to improve programs. For example, "[Colleagues] understand [evaluation] better, right? So they hold our feet to the fire around evaluation. Or they may call the leadership table to call for evaluation where it wasn't called for before. So they are way more active and dynamic" (OL #2). OLs also discussed the value of evaluation, but did so in the context of understanding the benefits of evaluation and linking evaluation to the mission and values of the organization, which is addressed in subsequent sections.

4.6. The personal factor

Patton (2008) emphasized the importance of the personal factor, wherein evaluation is better used and implemented as a result of personal rapport between the evaluator and the client. Indeed, this personal factor emerged as an important component in organizations that

supported sustained evaluation practice. ECBPs came into organizations and worked with staff on rearranging their evaluation practice, which added extra responsibilities for staff members. Going through this process was challenging; however, an ECBP that was friendly, knowledgeable, and in-step with organizational mission and values helped facilitate the complicated ECB process.

Multiple organizational leaders praised the ECBP. "[ECBP] is incredibly bright and has this really broad ability to see things in a very broad way but also get to the nuts in ways I haven't experienced before. She was a pretty special person to have engaged our organization" (OL# 11). Additionally, organizational leaders noted that having an ECBP understand their needs was a necessity. In one instance, an organizational leader described not rehiring an evaluator because his or her stance did not match the organization's stance. "...The fact that she looks at it from like a long-term standpoint and I needed data right now. I did have to bring somebody else because that's not necessarily her style" (OL #9). Here we see a direct link between evaluator-fit and organizational need. For sustainable evaluation practice to manifest during the ECB process, it appeared that a good working rapport with an ECBP, and the ECBP's approach aligning with organizational needs, was helpful. Ongoing contact with the ECBP helped sustain evaluation after the ECB effort ended. Four organizations renewed ECBP contracts to continue ECB work. Three organizations described informal, ongoing contact with their ECBP. In these cases, the ECBP was not under contract, but leaders used the ECBP on an as-needed basis. Once the ECB contract ended, organizations had questions about program protocols, such as data analysis. Organizations found it beneficial to connect with their ECBP, receive input, and move forward with their professional advice. Thus, this contact was similar to an on-call technical assistance provider or evaluation coach, both of which are common activities to support ECB (Preskill & Boyle, 2008; Author(s) (2016)) Both ongoing formal and informal ECBP contact helped organizations "check-in" with their evaluation questions and concerns, which helped organizations continue their evaluation practices.

4.7. Understanding the benefits of evaluation

Once evaluation use occurred, staff began to understand the benefits of evaluation; organizational staff experienced how evaluation was helpful for their work.

The direct care folks who have the hardest job, they are not paid well. There's a high burnout. They can take information to them and go... look you are actually making a difference in these peoples lives and its hard to know that sometime because people disappear, you don't often get the thank you card from a client that you only saw four times. But that I think has been really helpful for them

(OL #10).

Here, the OL described how the organization communicated to staff to show their work was making a difference. In another example, OL#12 described how the evaluation reports shared to staff helped them understand the importance of evaluating their impact: "when... [staff] see the...graphs and they see the knowledge change.... I think that that is a very visual way of showing what we do matters and why we need to be evaluating it." This was echoed and consistent across organizations—using and reflecting on evaluation data helped staff understand the benefits of it.

4.8. Alignment of evaluation to mission and values

The interviews showed that *alignment of evaluation to mission and values* of the organization played a key role in helping staff understand the benefits or value of the evaluation process. One OL described how she used organizational values to garner buy-in from staff: "We have a set of seven core values, like we are constantly going back to that because it's like if I see eyes glazing over when I am talking about

evaluation I don't like that and I am going to tell you why you need to care" (OL #12). Another OL described how evaluation data helped her organization tell their story and helped staff reflect on their own values and impact. "...And so it speaks directly to that value, so its really based on...we make a set of commitment to community members, volunteers, and donors and this helps us to stay honest and clear about where we are doing well and where we need to do some work" (OL# 8). In these instances, the alignment of evaluation to the mission and values of the organization helped staff see the benefits of evaluation, which in turn facilitated evaluation practice.

There was a strong link between understanding the benefits of evaluation and beginning to buy-in and value it. Every OL articulated that once staff understood the benefits of evaluation, they were more likely to commit to evaluation and believe in its utility. For example, an organization described this relationship. "We have about 25 % who have been touched by assessment in such a way that they have experienced a benefit, either personal or program benefit. They do value it" (OL #4). Once staff understood the benefits of evaluation they were more likely to value it. Furthermore, "...we have been able to take that information and share it with the Board in meaningful ways. It helps them see why we do this and why organization community voice is vital" (OL #8). Thus, findings suggested that there was a developmental process in this outcome: first, people understood that it was necessary and once they personally benefited from it, they began to believe in its value for their practice and organization.

5. Discussion

In this purposive sample of organizations, we found consistent evidence of evaluation practice multiple years after organizations participated in an initial ECB intervention. This study also identified a developmental, iterative cycle for how ECB led to organizations practicing evaluation. By understanding this development in exemplary organizations, ECBPs and OLs may consider implications for sustaining evaluation in a variety of organizations. Although these findings cannot generalize to all ECB interventions in all organizations, they do provide evidence that sustained evaluation practice as a result of ECB interventions is possible.

This study demonstrates that organizations learning to practice evaluation might be like a child learning to ride a bicycle. ECB interventions and the work of ECBPs served as training wheels, providing helpful supports as organizations learned to balance themselves and build confidence in their abilities to practice evaluation. With these supports, organizations fully engaged in evaluation practice, in the same way that training wheels allow a child to ride a bicycle.

This research demonstrated what happens when it is time to take off the training wheels. In this metaphor, sustainability meant that organizations learned to keep their balance without the training wheels, and never forgot how to practice evaluation, similar to how someone does not forget how to ride a bicycle. This study demonstrated that organizations could practice evaluation, but they were still wobbling in their evaluation practice, and it is unclear if they might eventually fall due to changes in leadership, lack of resources, or other contextual factors. Organizations that invested in ongoing contracts or maintained contact with their ECBP recognized that they do occasionally fall; thus, they needed someone to help them get started again, similar to how an adult may hold the back of a child's bicycle to help them gain their balance and resume riding. In what follows, each element in the cycle is discussed in relation to the prior literature.

First, leadership has been consistently discussed in the ECB literature (Labin et al., 2012; Preskill & Boyle, 2008; Silliman, Crinion, & Archibald, 2016; Taylor-Powell & Boyd, 2008) and proved critical for the OLs this study. This study documented the impacts of Board members actively engaged in evaluation and ECB, which has not been explored previously and deserves further study. This study also showed the importance of evaluation champions in sustaining practice;

however, more research is needed about how ECB and ECBPs cultivate leadership or champions. Future research might also focus on the ideal conditions and contexts for ECB and what leads organizations and leaders to seek it out. Understanding how ECB *begins* is important for understanding how effective and sustainable it can be.

Closely related to leadership is the importance of dedicating resources to evaluation, which is also evidence in previous studies (Bakken, Núñez, & Couture, 2014; Cohen, 2006; Compton, Glover-Kudon, Smith, & Eden Avery, 2002; Author(s) (2016); Fleming & Easton, 2010; Hoole & Patterson, 2008; Katz et al., 2002; Milstein, Chapel, Wetterhall, & Cotton, 2002). Organizational contexts, such as turnover and lack of resources, were common barriers to sustainability. These findings also mirrored past ECB findings (Andrews et al., 2006; Chinman et al., 2008; Huffman et al., 2008; King, 2002; Labin et al., 2012; Miller & Lennie, 2005). In addition, with non-profits commonly struggling with funding (Carman, 2007), further research on the links between evaluation and funding for development would be helpful for organizations and ECBPs alike.

Leadership and dedicated resources were critical to starting and maintaining evaluation practices, which provided opportunities for practicing evaluation. ECB models have discussed these links (Bourgeois & Cousins, 2008; Preskill & Boyle, 2008; King & Volkov, 2005; Taylor-Powell & Boyd, 2008), and this study explicitly linked these components to sustainable evaluation practice. Previous research on long-term ECB impact identified conducting evaluation (Campbell et al., 2004; Nagao et al., 2005), using evaluation (Carden & Earl, 2007; MacLellan-Wright et al., 2007) and thinking evaluatively (Carden & Earl, 2007; Fierro et al., 2018; Katz et al., 2002; Taut, 2007) as key outcomes. This study provided further articulation of these practices, and more importantly, demonstrated that these apparent outcomes of ECB are also essential activities during ECB. In other words, organizations learned about evaluation through doing evaluation with the support of an ECBP. Overtime, these practices were expanded and refined.

This study affirmed that engaging in and using evaluation provided opportunities for organizations to understand the benefits of evaluation and value it. These efforts then led to further engagement in evaluation; thus, they were critical to sustainability. The link between them has not been evident in previous research. This finding is important because it shows how practitioners can actively promote positive attitudes and buy-in around evaluation. By pointing out personal, professional, organizational, or community benefits to evaluation, ECB practitioners can cultivate staff buy-in around it, which can help facilitate sustained evaluation practice.

The personal factor arose as critical in some organizations. The personal factor has received some attention in the ECB literature (Author(s) (2015)); however, characteristics and competencies that make an ideal ECBP remain undetermined. This study showed that a friendly demeanor, sharing organizational language, and understanding its mission and values helped build rapport. Ongoing ECBP contact was found to help organizations continue their evaluation efforts. Similarly, Nagao et al. (2005) noted that ECB participants felt that they needed ongoing support and coaching. Ideas, such as insourcing ECB, where evaluators are on-call to help several organizations with their needs, have received attention (Miller, Kobayashi, & Noble, 2006), in addition to ongoing evaluation coaching models (Author(s) (2016), 2015). This research further demonstrates that organizations benefit from ongoing, as-needed contact with an evaluator.

OLs did not emphasize some supports for sustaining evaluation practices that were identified in the literature review, including culture, communication, learning, systems and structures, and outside supports. These supports were either rarely mentioned or commonly mentioned in conjunction with other supports included in the cycle. For example, culture was discussed in the context of leadership, resources, conduct, use and value of evaluation. Evaluation practice may need to be sustained over a longer period of time before these supports are distinct

from the other supports, which is a link that has been hypothesized and explored in past research (Alaimo, 2008). Further research about the link between sustainability and the development of evaluation culture, communication, learning, and systems and structures are needed. The minimal emphasis on outside supports as a key ingredient for sustainability might be an artifact of the sample for this study. Many organizations were internally driven to seek out ECB work, and under these conditions outside supports might be less critical.

5.1. Limitations

This study had several limitations. By selecting organizations that “bought in” to the process and personally referred by ECBPs, the results do not provide the full picture of ECB impact. Not all organizations are ready, able, or willing to engage in an ECB intervention. Understanding contexts conducive to buy-in, whether or not an organization is ready for ECB, and how ECB interventions impact organizations with less buy-in are important areas for future research. The sample was also limited to high dosage ECB efforts across non-profits, foundations, and higher education institutions in America and Canada. A more diverse sample of larger organizations, across a broader range of institutions (e.g., government, public health, international development) at different ECB doses would provide contextual information about how ECB promotes sustained evaluation practices in different contexts. In addition, most of the ECBPs were independent consultants who led small organizations, which is not representative of all practitioners. Larger consultancy organizations were unable to participate in this study because of organizational protocols that disallowed them from identifying clients. A diversified portfolio of ECB practitioners and their impacts would have benefited this study. Finally, it is important to note that causal attributions between ECB and sustained evaluation practices are not possible given the methodology; however, evidence does suggest that ECB helps contribute sustainability. Research designs that can inspect causal links would benefit the field.

5.2. Lessons learned

This research found that evaluation practices can and do sustain after ECB interventions. It also showed important levers that OLS and ECBPs can use to sustain evaluation practices—encouraging leaders to engage actively with evaluation and approve resources for it, pointing out the benefits of evaluation to staff in real-time, aligning the work to the mission and values of the organization, and planning for ongoing contact after the intervention, as needed. The sustainability of evaluation, however, remains tenuous in organizations. ECBPs ought to consider issues of stable personnel and funding as they engage in ECB.

6. Conclusion

To date, research on sustainable evaluation practice has received limited attention in the theoretical and empirical literature, even though ECB research began with the promise of developing sustainable evaluation practice in organizations. This study did demonstrate the ECB interventions provided supports for organizations to practice evaluation, as evident by conducting evaluation, using evaluation, and thinking evaluatively. These practices were sustained through an iterative cycle that includes the investment from leadership, resources, personal factor of the ECBP, understanding the benefits of evaluation, and alignment of evaluation to organizational missions and values. However, returning to the metaphor of riding a bicycle, key questions remain. Did ECBPs teach these organizations to ride, or were these organizations born to ride and needed minimal supports? Are there some organizations that might always need the support from an adult? If wobbly organizations fall, do they get back up to practice evaluation again? Evaluators ought to continue to explore these questions.

Declaration of Competing Interest

The authors declare that they have no known competing financial interests or personal relationships that could have appeared to influence the work reported in this paper.

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