

# Evaluation Champions: What They Need and Where They Fit in Organizational Learning

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*Evaluation champions in four state Extension systems described needs for training and support and perspectives on building evaluation capacity in their organization as part of a larger interview study exploring their roles, growth, and motivations. These 40 evaluation leaders identified needs for basic and advanced evaluation skills training, technical assistance, and practical learning via mentoring and project teams. Recommendations for organizational change in evaluation capacity included “top-down” investments in communication, training, and practical support, as well as increased “bottom-up” efforts by champions like themselves to advocate, model best practice, and contribute to training and mentoring peers. Implications for professional development and evaluation capacity building in Extension and other community-based organizations are discussed.*

*Keywords:* program evaluation, evaluation capacity, evaluation capacity building, organizational learning, evaluation champions

## Introduction

In an era of rapid change, complexity, and accountability, evaluation is critical to both program and organizational effectiveness (Argryis & Schön, 1978; Russ-Eft & Preskill, 2009). Scholars of evaluation practice frequently identify “evaluation champions” as catalysts for organizational accountability, learning, and innovation in Extension (Taylor-Powell & Boyd, 2008) and in other organizations (King, 2007; Preskill & Boyle, 2008; Scheirer, 2005). Champions include line supervisors and rank-and-file coworkers who actively advocate, model good practice, conduct training, and mentor peers in program evaluation. However, there is a lack of primary research aimed at understanding the perspectives of evaluation champions. Thus, we interviewed peer-nominated champions about their experiences and roles (Silliman, Crinion, & Archibald,

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2016). As part of the same study, this paper reports champions' perceptions of their own and their peers' training and organizational evaluation capacity building (ECB) needs. Champions' "insider" positions and practical experience make them valuable informants on individual and organization needs for ECB (King, 2007). Equipping and engaging champions promises to be an efficient and effective means of building capacity.

Individuals and organizations in government and nonprofit sectors, including the Extension system, face increasing demands to document program quality and effectiveness (Carman, 2007; Carman, Fredericks, & Introcaso, 2008; Rennekamp & Engle, 2008). Consequently, these organizations are giving increased attention to professional competencies and organizational capacities that support staff performance and learning from programming, evaluation, and interaction processes with stakeholders (Lamm & Israel, 2011; McClure, Fuhrman, & Morgan, 2012; Rodgers, Hillaker, Haas, & Peters, 2012; Stevahn, King, Ghere, & Minnema, 2005; Taylor-Powell & Boyd, 2008). Evaluation skills are regarded as core competencies and training priorities for Extension professionals (Arnold et al., 2008; Diem, 2009; Kluchinski, 2014; Lekies & Bennett, 2011; National Professional Development Task Force, 2004; Schwartz & Gibson, 2010). Radhakrishna and Martin (1999) identified a strong demand for program evaluation training in a variety of formats (e.g., workshops, short courses, videos, seminars, or newsletters). More recently, studies have noted important differences in needs for and uses of evaluation skills across Extension disciplines (Garst, Baughman, & Franz, 2014; Ghimire & Martin, 2013). McClure et al. (2012) identified two major skill priorities overall (analyzing data and disseminating findings) as well as differences in needs across disciplines and experience groups. Even within a centralized program management model, evaluative thinking and implementation require significant insight and competence for professionals (Arnold, 2015; Buckley, Archibald, Hargraves, & Trochim, 2015) and systemic capacity for organizations (Preskill & Boyle, 2008).

Research on individual competency building points to the importance of mentoring, skill practice, and evaluation use as critical steps for staff to move beyond knowledge acquisition to skill mastery in evaluation (Arnold, 2006; Baughman et al., 2010; Baughman, Boyd, & Franz, 2012; Dillman, 2013; McClure et al., 2012; Morford, Kozak, Suvedi, & Innes, 2006;). Early career training (Baker & Hadley, 2014; Brodeur, Higgins, Galindo-Gonzalez, Craig, & Haile, 2011; Harder, Place, & Scheer, 2010; Llewellyn, 2013) as well as continuous learning (Taylor-Powell & Boyd, 2008; Silliman & Guin, 2012) enhance professional coping as well as program management, accountability, and improvement efforts. However, program evaluation is but one of many training needs, often considered less interesting, accessible, or urgent unless required by a sponsor organization (Lakai, Jayaratne, Moore, & Kistler, 2012; Lamm & Israel, 2011; Lekies & Bennett, 2011; Morford et al., 2006).

Growing out of research and practice in organizational change (Argyris & Schön, 1978; Nevis, DiBella, & Gould, 1995; Senge et al., 1999), the concept of ECB is more complex than

completing evaluation projects or training and motivating individuals at one moment in time (Compton, Baizerman, & Hueftle-Stockdill, 2002; Taylor-Powell & Boyd, 2008; Torres & Preskill, 2001). Continuous investments in training, mentoring, and sustained practice with relevant projects are essential for individuals to achieve skill mastery (Arnold, 2006; Dillman, 2013). Yet, cultivating independent evaluation practitioners is but one element in building organizations that effectively navigate and learn from complex and changing dynamics of the organization and larger social environment (Franz & Townson, 2008; Taylor-Powell & Boyd, 2008).

Although ECB includes *doing* evaluation projects, it extends to building and using knowledge and skills to learn, improve, and demonstrate accountability, and engage program staff and partners in a culture of continuous improvement (King, 2007). Taylor-Powell and Boyd (2008) explained that organizations build the skills and culture of evaluation through (a) professional development (formal and informal training and technical assistance, collaborative projects, mentoring and coaching, and communities of practice); (b) resources and supports (expert consultants or networks; technology; materials such as examples, guides, and metrics; evaluation champions; assets such as partnerships, networks, expertise, or infrastructure; financing; technology for evaluation and training delivery; and time allowances for learning and doing evaluation); and (c) organizational environment (leadership vision and goals; internal or external accountability expectations; incentives to evaluation performance; structures for communication, teamwork, and management; and policies and procedures guiding all phases and applications).

Preskill and Boyle (2008) have proposed a more detailed multidisciplinary model for organizational ECB that focuses on reciprocal processes of training and application of knowledge, attitudes, and skills in evaluation. Training process goals are grounded in motivations, assumptions, and expectations about the organization and context and expressed through teaching and learning strategies tailored to specific staff and settings. Training is adapted and informed by sustainable practice that includes commitments to policies, plans, processes, and structures that promote continuous learning and evaluation use. Organizational leadership, culture, structures, and communication provide a context and catalyst for training and practice and facilitate transfer of learning between the spheres of *knowing* and *doing* evaluation.

More recently, Labin, Duffy, Meyers, Wandersman, and Lesesne (2012) proposed an Integrative Model focusing ECB on three elements: (a) need, including motivations, objectives, context, and resources; (b) activities, incorporating strategies, implementation, and evaluation efforts; and (c) outcomes at the individual and organizational level, including positive and negative implications for programs sponsored by the organization. Although not all elements need to be in place to build capacity, leaders of complex organizations in changing environments are often challenged to know *which* strategic and sustained investments may advance evaluative thinking and doing at a given point in time (Franz & Townson, 2008).

King (2007) identified four practice-based indicators of *readiness* for ECB: (a) organizational capabilities and expectations, (b) emergence of evaluation champions as advocates and role models, (c) administrative leadership, and (d) policies and practices supporting program and evaluation best practice. Process use, or integration of evaluative thinking and follow-up in the everyday activities of an organization, is a starting point for ECB (King, 2007). Together, these observations suggest evaluation champions, whether administrators or coworkers, may be pivotal leaders in ECB through their advocacy and engagement, modeling of sound evaluation practices, and mentoring of individuals or program teams in the context of everyday programming.

Despite the benefits of ECB, organizations may limit investments due to competing demands in other areas, limited or unsustained administrative support, lack of knowledgeable facilitators, or inadequate infrastructure (King, 2007). Constraints that influence evaluation decisions such as money, time, personnel, context, constraints, and politics (Mertens, 2005) likely also affect capacity building. Under such circumstances, front-line champions may influence a relatively small circle of colleagues, while administrative champions may reshape policies and practices such as training, work teams, reporting, and reward systems (Lamm & Israel, 2011; Rennekamp & Arnold, 2009). However, champions' influences are likely to be more accessible, profound, and sustained (rather than periodic workshops or reporting guides), and especially as that small circle grows, more impactful than superficial or shifting emphasis on ECB typical of most organizations. However, there has been little empirical research on the activities and development of evaluation champions in government and nonprofit organizations.

This article describes exploratory research on the perceptions of Extension evaluation champions regarding individual and organizational needs for growth and change to improve evaluation capacity. The article concludes with implications for practice, research, and policy.

### **Extension Community of Practice Focus on Champions**

A professional evaluation community of practice (E-CoP) within the eXtension online network of the multistate Cooperative Extension system identified research on the work of evaluation champions as a priority for assessing the status of and needs for ECB among Extension professionals. A report on evaluation champions' roles and motivations is available separately (Silliman et al., 2016). Based on research and practice cited above and E-CoP interest in the experiences and needs of champions to be served by an electronic ECB network, we examined:

1. What do evaluation champions and their colleagues need to improve their understanding and practice of evaluation?
2. What technologies would evaluation champions find helpful for their evaluation work, especially in areas such as planning, data collection and analysis, and communicating results?

3. What changes do evaluation champions recommend to improve evaluation and capacity building in Extension systems?

### **Methods**

An exploratory, qualitative interview design was selected to capture the breadth of contexts, activities, and roles of county- and state-level evaluation champions. This methodological approach was selected because it is well-aligned with the overarching purposes of this study; qualitative data, especially semistructured qualitative interview data, are well suited for exploratory studies aimed at developing a nuanced understanding of people's experiences with a given phenomenon (Creswell, 1998). This methodological approach is also consistent with the researchers' espoused epistemological stance for this study, which is a pragmatist, constructivist epistemology with elements of critical realism (Creswell, 1998; Miles & Huberman, 1994).

In terms of researcher subjectivity and reflexivity, all three authors are Extension evaluation specialists who work to support ECB, often by working with evaluation champions, in our states. While we seek to better understand evaluation champions, our positionality predisposes us with a positive bias about them, and we have numerous anecdotes and preconceived notions about the experiences, roles, and needs of evaluation champions. We have used this positionality as a productive heuristic guide rather than letting it compromise the trustworthiness of the study.

### **Sampling**

A purposive sampling strategy was used to select one state Extension program in each of four Extension regions (i.e., Northeast, Southern, North Central, and Western). We do not report the names of states to help ensure confidentiality of participants in this study. Larger state programs were selected to ensure a sufficient number of respondents across a range of disciplines. Either via email or at statewide in-person Extension events, evaluation specialists, administrators, and agents in each state nominated up to ten champions based on their advocacy, practice, and/or training efforts for program evaluation, continuing purposive sampling at the level of individuals.

As this was an exploratory study, the selection of individual participants was purposefully open, without predetermined specific criteria for what constitutes an evaluation champion. Respondents were contacted by the authors and recruited into the study consistent with protocols approved by the Human Subjects Boards of the lead institutions. Almost all invited champions elected to participate in the study (five potential participants elected not to participate because of being too busy or being on maternity leave). Overall, the 40 champions, including 15 males and 25 females, had an average of 15 years of experience, with a state average range of 11.8 to 18.8 years, and an individual range of experience from 2 to 35 years. Champions represented all major Extension programs, with 18 having some responsibilities in 4-H; 17 in Agriculture and/or

Natural Resources; 12 in Family and Consumer Science, Nutrition, or Health; and 4 in Community Development. The group of champions consisted of specialists and agents representing various administrative positions within their respective Extension system, though the majority were county-based agents. In total, there were 6 state or county administrators, 6 state specialists/assistants, and 28 field agents in our sample.

### **Data Collection**

During initial phases of the development of this study, five Extension evaluation professionals (all affiliated with the E-CoP) brainstormed items for the semistructured interview protocol used in this study. A list of the 13 items included in the final protocol is included in the Appendix.

Two of the authors (BS and PC) conducted all of the interviews (with three states' interviews conducted by BS and one by PC). As longstanding evaluation practitioners, the researchers have extensive experience conducting interviews. The interviewers built rapport with the interviewees through their shared participation in the same professional system, the Cooperative Extension system. In some cases, the interviewer knew the interviewee personally. Across the four states, in the months between July 2013 and May 2014, 40 semistructured interviews were conducted by phone. Interviews lasted 30 to 45 minutes.

In most cases, to balance feasibility and precision, interviews were not audiorecorded, but extensive notes (including verbatim quotes) were typed by the interviewer during the interviews (Kvale & Brinkmann, 2008; Tessier, 2012). In one state, interviews were audiorecorded. To improve accuracy of interview notes, interviewers conducted immediate member checks with participants by paraphrasing their responses during the interviews. In addition, completed and edited interview notes were shared with interviewees for formal member checking, with roughly 20% of participants suggesting minor changes to the interview notes.

### **Analysis**

All three authors conducted the analysis of the data. A general inductive approach was used. This approach is an “easily used and systematic set of procedures for analyzing qualitative data that can produce reliable and valid findings” (Thomas, 2006, p. 237). It serves to:

- (a) condense raw textual data into a brief, summary format; (b) establish clear links between the evaluation or research objectives and the summary findings derived from the raw data; and (c) develop a framework of the underlying structure of experiences or processes that are evident in the raw data. (Thomas, 2006, p. 237)

First, an initial coding dictionary was created as a separate Word document with a priori codes based on the objectives of the study and the items in the interview protocol. This coding

dictionary included the code's name, identification number (for quick reference while coding), and a brief description or definition. Data were managed by entering each discreet phrase or sentence into an Excel database, where each phrase or sentence occupied a row, and potential codes were represented in the columns. In any analysis of interview data, there is a decision to be made between proceeding horizontally, complete interview by interview, or vertically by variable or item. In this study, data management and analysis proceeded item by item, rather than interviewee by interviewee. This approach, discussed by Kvale and Brinkmann (2008), offers the advantage of allowing the coder to become immersed in the codes associated with a given item, thus increasing the likelihood for consistency in coding. This approach does, however, have the limitation that the narrative nature of the individual interviewee's data can be disrupted. Given the objectives of this study and its underlying epistemological and methodological framing, the item by item analysis was the most appropriate option.

The three authors assigned items for analysis between them such that each of the 13 items was coded by two researchers, with different permutations of paired researchers working to analyze each item. The coders first coded their assigned items on their own, by reading each interviewee response to that item and then assigning it with one or more of the established codes. Emergent codes were also identified during coding; in such instances, the code book for the affected item was updated, and like with the constant comparison method of grounded theory (Charmaz, 2014), data which had already been coded before the addition of the new emergent code were reread and, if required, recoded to include the new code where applicable.

The pairs of coders then met to discuss any discrepancies and to ultimately come to consensus. In most cases, this co-coding activity led to changes in the coding of one coder only if she or he had omitted a code which was later deemed pertinent and appropriate. In very few cases, the two coders disagreed slightly and then dialogued until consensus was reached. Finally, all three researchers met repeatedly to identify typical and distinctive themes in each item, noting illustrative quotations, examples, and contexts. As a pragmatic constructivist study, positivist notions of validity and reliability are not applicable. Rather, we endeavored to ensure the quality (i.e., credibility and provisional transferability) of our inquiry through feedback (including member checks, both technical and reflexive), "rich" (highly detailed) data, peer debriefing, and constant comparison (Maxwell, 1996; Mertens, 2005).

## **Results**

Qualitative content analysis identified core themes in the data for two study objectives on champions' perceptions of needs for ECB and one objective on perceptions of organizational changes related to ECB.

## **Objective 1: Extension Professionals' Needs to Improve Understanding and Practice**

With respect to the resources needed by champions and their Extension peers, nearly three-fourths of respondents expressed a need for training, including general (e.g., planning-to-reporting process), specialized by method (e.g., survey, focus group), or context (e.g., animal science, pest management, 4-H clubs). Training on “basic skills” for new staff or evaluation novices was emphasized as a need across several states. Although technical skills such as developing logic models or writing evaluation questions and reports were mentioned, “basics” most often cited included broader principles such as “planning evaluation at the beginning of a project” and grasping the evaluation process from planning through reporting.

Motivations to evaluate, including valuing accountability and continued support and program improvement, were also cited as “basics.” Half of the 40 respondents cited a need for resources, including mentoring and evaluation tools such as project-specific measures and exemplars. Respondents in several states desired practical examples from all phases of the evaluation cycle. One suggested, “I think examples of what has been used and the kind of impact reports that have been written would be great.” At the same time, champions often mentioned that ECB is more than “gadgets,” as suggested by this comment: “People are always saying, ‘Why don’t you just give us some tools?’ ... [but] they need to understand evaluation as more than just a tool.”

Many<sup>1</sup> champions perceived needs for additional “basic skills” training for themselves, but most sought specialized skills, including guidance on asking questions; completing Institutional Review Board applications; mastering statistics, content analysis and related software; interpreting quantitative or qualitative data; and communicating results, especially when tailored to programs. One respondent said, “The biggest challenge is transforming results into something I can report...including economic impact.” A county agent with graduate training in quantitative analysis expressed a need to better understand qualitative methods to track professional growth of interns. Others cited writing grants and journal articles as training priorities.

Only one state provided extensive (lasting two years) professional development in evaluation. Champions who participated in that program as well as those with extensive graduate training or mentoring experience in other states were least likely to indicate a need for “basic skills” review and most likely to desire specialized assistance. This pattern was consistent across disciplines (agriculture, 4-H, family and consumer sciences, and natural resources). More highly trained respondents expressed the most confidence about where to find resources for emerging needs of trainers or agent-leaders. Regardless of prior training and experience, respondents consistently recognized the importance of refreshing prior knowledge and skills and building new skills.

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<sup>1</sup> Respondent proportions are given for more specific comments and general labels applied to broader comments (e.g., specific comments on “basic skills” and mention of specific skills such as planning or statistics on an introductory level). Thus “most” indicates a large majority, “many” indicates a large minority, “several” indicates a small minority, and “a few” indicates less than ten respondents.

Specialized training needs were typically related to a particular program and most effectively learned through doing evaluation of that program (Silliman et al., 2016). One agent summed up this need for learning in context as follows: "...on-going communication with experts...training, consulting, encouragement to learn...[and] building on capacity." Especially in those settings where formal training and expert consultation were limited, respondents cited the importance of peer-to-peer idea-exchange and resource-exchange through mentoring, online and face-to-face conferences, and project groups. Most champions served as informal mentors for individuals and project teams; thus, expressed needs often included tools and strategies for engaging less-experienced peers in evaluation.

Beyond the need for training resources, respondents desired specific and clear guidelines on when, what, and to what degree to evaluate, as one indicated, "Would like to see more structure embodied in policies, regulations, and recommendations for conducting evaluations." Respondents were especially frustrated when policies, including those affecting reporting and promotion, were stated in one way and (in their view) enforced inconsistently. Since interviewees were champions for evaluation, less rigorous standards and support by administrators was often viewed negatively. Midcourse changes in program priorities, evaluation goals or tools, or funding cuts despite promising results, were especially frustrating. Inadequate resources for evaluation was a frequent theme. Resource deficits in time to complete evaluations, organizational support (e.g., technical and administrative), and recognition (e.g., affirmation more than awards) were more often cited than money as critical for effective evaluation. A youth agent suggested job realignment as one way to increase efficiency: "I spend a lot of my time on marketing, human resources, budgeting...those could be done more efficiently by others so that youth development staff could focus on programming and evaluation." In one state with quite limited training resources, an evaluation champion said, "staff needs the permission to make this [in-depth evaluation study] a one- to two-year goal and then have administration allow time for its development."

Champions wanted to know more about how their data were used at the state level. Although several offered examples of their own evaluation use (e.g., program improvement, staff training, evidence for funders, professional promotion), they were uncertain how data submitted to state data sets were used. Despite citing constraints on training, support, and time, champions consistently emphasized commitment to their work and desire to make a difference.

## **Objective 2: Extension Professionals' Needs Related to Technology and Online Resources**

Evaluation champions were also asked about professional needs for support in evaluation via technology. Champions reported website use and needs for more and better online tools for data collection, social media, analysis and reporting software, as well as online access to experts. Identified needs included established tools such as data entry and analysis software (e.g., Excel,

Survey Monkey) and recent technologies such as Moodle training, clickers, Twitter, and web-based and smart phone applications for data collection and data entry. Not surprisingly, champions who were more experienced with technology generally expressed greater need for technology-related training and evaluation tools. Respondents also valued web tools and remote consultation for preparing reports, including templates and exemplars, fit to specific programs (e.g., health, STEM). Finally, the need to better understand stakeholder (grantor) expectations was a prominent theme in all sites and across disciplines.

Training needs emphasized availability of synchronous (e.g., webinars, live consulting) and asynchronous (e.g., web-based videos, fact sheets, Q&A, blogs) tools, as suggested:

Maybe a video that discusses a specific topic like how to analyze data in Excel and then how to effectively present the results... We need to do a better job in thinking about how to include evaluation before we begin a program. If there was a tool that helped us do that, it would be a great help.

One respondent recommended scrapping the current state reporting system in favor of a more dynamic, improvement-oriented approach. Recognizing the rise of a more technology-savvy generation of Extension workers, one champion quipped, “With changes in organizational culture and demographics of Extension organizations [e.g., more tech-savvy employees], new possibilities in technology are emerging.”

One state in the study had initiated an extensive web-based system with information, tools, and access to experts and received multiple compliments from its champions, who saw possibilities for adding topics and audiences. Based on their experience, that state’s respondents suggested tiered opportunities for mentoring based on evaluation experience, as suggested by this comment: “Additional opportunities for learning-by-doing and mentoring would help, especially with emphasis on the bigger picture of why and how we do evaluation and interpretation.” Others in the same state recommended “just-in-time” access to experts, including working with design, statistics, and communications experts at proposal/program development, then receiving coaching as the project moved forward.

Peer and expert sharing of expertise was another advantage seen in technology: “It would be nice to consult with other peers across the country and have access to experts in certain areas.” In fact, at least a few respondents in each state had participated in and desired more multistate webcasts and virtual projects. In the two states with the most online resources and interaction, champions reported consistent use and recommended expansion of resources. Needs for technology expertise were diverse and included evaluation innovations, as illustrated by one respondent: “Last year I hired a videographer to capture the message in a way that stakeholders get excited about.”

### Objective 3: Recommended Organizational Changes

Evaluation champions responded to one item on organizational change. Overall, they expressed the need to foster a culture of evaluation in Extension. This theme was associated with making evaluation a priority and having clear, consistent messages about the importance and use of evaluation within the organization. In all states, respondents perceived unclear or inequitable expectations, fluctuating priorities, support, and accountability relative to program evaluation.

Respondents offered diverse views on the most appropriate source of organizational change. Some champions recommended *administrative* changes, while others emphasized *personal* and *team* initiative as a catalyst. Similarly, some expressed the need for additional extrinsic rewards, while others advocated increased intrinsic motivation. Many champions urged more proactive administrative leadership: “A culture shift is needed in Extension so that evaluation is not seen as an afterthought or tack-on, but embraced for what it is and has the capacity to do.” Another said, “The first thing is how important evaluation is to managers in the system. If an administrator doesn’t need or request it, evaluation won’t become a priority at the local level.” Echoing comments about organizational needs, a few respondents expressed skepticism about the priority of evaluation among state leaders: “Lip service is given to the need for evaluation...” but “...it is not truly ‘on the radar’ for those responsible for staff performance appraisal and raises.” By contrast, one champion described how evaluation might become a more significant part of the culture: “Creating a norm or expectation for doing good evaluation—a culture for evaluation—among professional educators is an important part of making it part of our programming routine.”

Greater communication, especially about evaluation use, was a significant theme, evident in this comment: “I would like to know and understand when and how my evaluation efforts were being put to use by the state office and communicated to others.” Strengthening Extension plan-of-work priorities and rewards that are already in place were perceived as concrete steps that all Extension administrators could take to make evaluation a “do-able” job: “As an educator, there is a lot on my plate, and I don’t think that evaluation is something that is given time or given as a priority part of my job.”

Comments also reflected an increased emphasis on individual agency, as this illustrates:

The ‘evaluation champions’ idea is intriguing, and several of us in the state could do that informally, advocating and improving practice. One of us is good at the qualitative side, and I could provide expertise on the quantitative. It is a matter of time and administrative ‘blessing’ or encouragement.

One respondent saw the solution as a “both/and” rather than “either/or” responsibility: “Maybe it’s a matter of changing perceptions that it’s everybody’s job and everybody can do it.” Even

when acknowledging a need, champions emphasized initiative: “What I would like to learn more about is tools and analysis so I am trying to talk to people about that more.”

Most recommendations echoed answers to prior questions, including statewide and multistate training systems with access to diverse learning and consulting venues, data entry, analysis, and reporting tools. However, one experienced champion noted that perhaps training was not the only approach to organizational change: “Recruitment and hiring of people with high expectations for performance and evaluation skills is critical. Practices in recruitment, program evaluation, and performance evaluation must match stated standards for things to get better.”

Several experienced evaluation champions urged greater attention to meaning in evaluation, with more in-depth “telling the story,” including context, activity, value, and quality of programming. Likewise, efforts to integrate evaluation with programming, marketing, and resource development were recommended as needed improvements in all states. In addition to a plethora of self-directed learning and application efforts described on prior items, evaluation champions provided these examples: “In the past, it was hit-or-miss for me until I started looking for the evaluation track at conferences...and will continue to do so” and “[state-level intensive training] helps people develop tools they are going to use all the time...I will maintain [that] relationship to get continued guidance.” Another respondent recommended more coordinated work: “It seems like we could do more multiple-county work, but are not quite there yet. So at least we need more sharing across counties.” Others noted the need for a more systemic, longitudinal approach such as, “...having a more coordinated system of data collection and sharing so that multiple programs could track a youth’s experience at several points of contact with Extension.”

This study did not include items on the traits or dynamics of the Extension organizations or their larger ecosystems; thus, findings cannot be fully contextualized. Yet, many comments described and implied elements of those contexts that influence evaluation and ECB in Extension, and many themes were common to all systems – increasing expectations for accountability and decreasing resources, and need for clear communication about program purposes and benefits within organizations and to broader communities. Each of the four Extension systems responded differently to this “squeeze,” although efforts to train and resource new staff with reporting tools and skills were common to all. One system, building on a federally-funded evaluation innovation model, focused substantial human and fiscal resources in a two-year training program with selected staff. “Graduates” of this training maintained a community of practice and applied skills as *resource and support* experts for local, regional, and state program teams and local units.

## Discussion

This is the first empirical study with evaluation champions, exploring perceptions of needs for training, technology resources, and evaluation capacity in four state Extension systems.

Qualitative research serves to highlight themes rather than generalize results. Nevertheless, study themes related to training, technical assistance (e.g., evaluation tools, expert consultation), and practical experience corroborate major theoretical and empirical models describing evaluation competencies (Russ-Eft et al., 2008; Stevahn et al., 2005;) and capacity building (Arnold, 2006; Labin et al., 2012; Preskill & Boyle, 2008; Stevenson, Florin, Mills, & Andrade, 2002; Taylor-Powell & Boyd, 2008).

Champions' recommendations echoed prior studies on training needs for novices, including basic knowledge and skills learned in formal settings, together with practical skills gained through mentoring, project team learning, and expert consultation (Arnold, 2006; Baughman et al., 2010; Dillman, 2013; Harder et al., 2010; McClure et al., 2012; Stevenson et al., 2002). This pattern is also consistent with champions' own learning, as reported earlier (Silliman et al., 2016). Champions, averaging 15 years of service, self-identified needs highlighting data analysis, interpreting data for meaning, and effective reporting, consistent with higher-order needs of experienced staff surveyed by others (McClure et al., 2012; Stevenson et al., 2002). However, needs across the evaluation cycle and specific program areas were also mentioned, reflecting both the breadth of competencies (e.g., Stevahn et al., 2005; Taylor-Ritzler, Suarez-Balcazar, Garcia-Iriarte, Henry, & Balcazar, 2013) and tiers of understanding or mastery (Arnold et al., 2008; McClure et al., 2012) required for independent practice.

New knowledge enabled by open-ended interviews included champions' interest in revisiting basic skills as well as exploring more advanced topics (e.g., IRB, statistics, content analysis, interpreting data), desire for social networks and access to experts, value on rehearsing skills through practice and mentoring, and pursuit of new methods and technologies, characteristic of effective and resilient professionals and organizations (Argryis & Schön, 1978; Taylor-Powell & Boyd, 2008). Needs for practical support (e.g., time allowances, additional expertise, explicit rules and procedures) and emotional support (encouragement, recognition) were also mentioned and are discussed in relation to organizational changes below.

Interest in technology to enhance evaluation practice, delivery of training, and professional networking fits a growing trend (McClure et al., 2012) and may represent a viable alternative to declines in training and support resources and heavier workloads (Diem, Hino, Martin, & Meisenbach, 2011; Lakai et al., 2012; Seger, 2011).

Champions in all locations were resourceful in seeking, developing, and sharing resources electronically. However, those aided by organizational investments in training and resource systems (online and face-to-face) were better able to integrate evaluation into their work and build innovative applications such as cost-benefit calculators and communities of practice (Silliman et al., 2016). Success with e-learning (e.g., social media, webinars, networked project groups) and evaluation technologies (e.g., planning templates, online surveys, Excel

spreadsheets), and multimedia dissemination (e.g., online newsletters, blogs, evaluation or instructional videos) may have increased interest in new technologies. However, such experiences may not be typical for Extension staff (Diem et al., 2011; Xu & Kelsey, 2012). Tech-savvy younger workers are accelerating these trends (Seger, 2011) and might be engaged as peer leaders in demonstrating applications, training, and infrastructure changes that exploit technologies. Also, champions' experience pointed to the value of technology for connecting with evaluation and content experts in state and national networks. Significantly, high tech and high-touch supports were viewed as complementary, with technology seen as extending access to and reach of peers and experts.

Themes related to organizational capacity building emphasized needs for both system-initiated (e.g., leader roles and communication, policies, infrastructure) and staff-initiated (e.g., self-motivated learning, experimenting, networking) are broadly consistent with existing models (Labin et al., 2012; Preskill & Boyle, 2008; Taylor-Powell & Boyd, 2008), with unique challenges in each Extension context. Administrative leadership is best positioned to direct formal changes to structures and investments in training and support, identified as critical foundations for ECB (Taylor-Powell & Boyd, 2008). Administrators also exercise substantial informal influence through mentoring promising champions and supporting established champions advancing evaluation practice (King, 2007; Silliman et al., 2016).

Across the four systems studied, King's (2007) indicators of readiness for ECB were evident in administrative decisions to hire, listen to, train, support, and recognize, thus motivate, evaluation champions on both local and state settings. Use of project-based teams supported by experienced mentors and campus experts, enabled champions to learn from and contribute to evaluation processes (King, 2007; Silliman et al., 2016). However, champions also noted that formal policies and organizational expectations for outcome-based performance were not consistently supported by ECB investments or performance standards and rewards. Champions attributed these trends in varying degrees to shifting administrative priorities, lack of clarity and consistency of communication, or lack of a systematic strategy for planning and evaluation use. Changing fiscal and human resources (e.g., budget cuts, attrition) significantly impacted policies, priorities, and program support.

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 (Silliman et al., 2016). Their recommendations for ECB collaboration between leaders "at the helm" and champions "in the

trenches” emerged from participation in “top-down” investments emphasizing rigorous training, as well as in resourceful “bottom-up” efforts to develop tools or find training through campus, community, or national networks.

In either paradigm, organizational leaders must articulate clear and consistent expectations, supported by realistic assumptions about stakeholder needs and training, and they must give consistent attention to infrastructure and practice that promote evaluation quality and use (e.g., Preskill & Boyle, 2008). Champions can facilitate small-scale changes as advocates, model practitioners, mentors or trainers even without strong leadership (Arnold, 2006; Baughman et al., 2010), but have the potential, often untapped, to facilitate system change when empowered by innovative leadership. Their influence will likely be magnified by engagement with project teams and in-state or multistate online networks (Arnold, 2006; McClure et al., 2012; Baughman, et al., 2010). Champions’ insight and “insider” experience might be engaged in determining ECB needs and monitoring progress, since novice staff are less likely to know their own needs. Champions can also help shape policies, lead training and mentoring, and help evaluate ECB and practice systems.

### **Limitations**

This study yielded insights consistent with current practice wisdom, but findings should be applied with caution, recognizing this is a one-time, qualitative study conducted with a purposive sample. More systematic sampling of diverse organizations, more detailed examination of contexts and conditions over time, and use of a mixed-methods design to capture depth and breadth would generate richer data and enhance transferability. Sample selection through peer nomination, relative to random sampling, may have introduced bias toward certain types of individuals unrelated to their championing of evaluation. Finally, qualitative interviews provided in-depth, in-context information (Stevenson et al., 2002) but might have produced a richer data set if complemented by a survey addressing a broad range of topics (Taylor-Ritzler et al., 2013).

Interviews utilized written notation, paraphrasing, and in-process and follow-up processes that were efficient and thorough but might have been enhanced with audio recording and full verbatim transcription. Coders found more variation by context and respondent experience than initially identified by interviewers, but differences among coders were not analyzed systematically. Diverse perspectives and negotiated consensus of multiple coders aided accuracy and thoroughness of content analysis, yet different coders or processes may have generated different conclusions.

## Recommendations for Practice, Research, and Policy

Emergence of evaluation champions indicates readiness for ECB (King, 2007). This study suggests that champions represent a strategic asset for building capacity, influencing leaders, policies, and practices. Recommendations for engaging champions and further investigating their work follow. Those implementing recommendations should “handle with care,” remembering that evaluation champions’ insights emerged from and must be applied in complex and changing contexts (Franz & Townson, 2008).

**Practice.** Trends toward lean management, rapid and relevant learning, and social networking recommend investments in champions that are positioned to identify needs and integrate new ideas and technologies at strategic points (e.g., projects, mentoring, and conferencing) more efficiently than a single evaluation expert. Cultivating champions through early career “basics” training, mentoring, and networking builds a culture for high expectations and performance. Engaging champions as partners with experts and administrators, supporting their continued growth (e.g., basic and specialized skills), and empowering their contributions (e.g., training, mentoring, developing tools and exemplars, peer assessment, and influence) compounds early training. Clearly, an important way to continuously cultivate champions is to offer formal or informal recognition and appreciation of their evaluation efforts. Finally, investments in high-tech online tools for training, cross-state networking, and managing evaluation (e.g., planning, data entry, analysis, reporting) complement high-touch mentoring and project team work, promoting high performance, efficiency, and growth in capacity.

Champions serve as catalysts for professional and program growth across disciplines, regions, and generations. Champions need different kinds of support because they have differing gifts, positions, challenges, and opportunities. Champions need to grow, connect, reflect, and do creative work in balance with contributing to organizational needs.

**Research.** Exploratory research typically raises more questions than it answers, so in expanding practice wisdom on roles and contexts of champions (King, 2007; Warrick, 2009) this study identifies promising lines of research on professional practice and development, evaluation use, and evaluation capacity building. 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.

Research should explore assets and limitations of champions as monitors of individual and organizational needs or as interpreters of organizational goals (whether as supervisor or peer),

elements identified with building evaluation knowledge and skills (Dillman, 2013; King, Stevahn, Ghore, & Minnema, 2001). Investigation of separate and conjoint work and impact of front-line champions and evaluation or subject matter experts would provide a better view to staffing and training patterns that promote ECB.

The study invites further research on effectiveness of online learning, networking, and needs assessment as “just-in-time” tools for project development, management, and organizational capacity. Likewise, roles and effects of technology throughout the evaluation cycle deserve further investigation. Given the expressed value on exemplars, process-oriented research should focus on ways in which champions and their peers learn and share evaluation knowledge and skills gained in project team experiences.

Research on organizational investments and policies regarding evaluation and capacity building might contribute to more effective management and professional development. Finally, the process of investigating champions’ roles, needs, and effects can be refined and expanded by more rigorous and longitudinal research.

**Policy and procedures.** Champions’ perceptions of organizational dynamics and leader roles invite further research into the importance of expectations and supports for evaluation quality, consistency, and capacity in building a culture of evaluative thinking and doing. Additionally, research might focus on the relative importance of hiring, professional development, or promotion decisions relative to training and support in building evaluation capacity.

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 (Preskill & Boyle, 2008). Additional training and support resources, dedicated time, and recognition will significantly enhance champions’ effectiveness and resilience in these demanding roles.

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## Appendix

### Evaluation Champions Interview Protocol

1. Please describe some examples of things you have done to promote evaluation of Extension programs. *Probe, if needed for examples of:*
  - *specific program evaluation methods/tools developed*
  - *reminding colleagues who are developing a program that they need to create an evaluation*
  - *mentoring new staff to help them evaluate their program efforts*
  - *involvement in professional development opportunities related to evaluation*
2. What stimulated your interest in promoting and supporting evaluation of Extension programs?
3. What keeps you motivated to promote and support evaluation of Extension programs?
4. What resources related to evaluation development and implementation have you found to be useful? Please describe them.
5. What resources (type or content) are needed to increase your skills and those of your colleagues in evaluating Extension programs?
6. What technical support would be helpful related to accessing and using technology or accessing expertise in areas such as research design, statistics, data interpretation, and communicating results/report preparation?
7. What changes in the Extension organizational environment would help support your evaluation efforts?
8. What else would be important to encourage and support your evaluation efforts?
9. Can you name some other people in Extension that you consider to be evaluation champions? What do they do?
10. **Note:** *The following is an optional question to be used if you have checked the membership list of Evaluation CoP members and the individual is not on the list. Are you familiar with or been in contact with the eXtension Evaluation Community of Practice members or website? (If not, interviewers share the following brief description of the Evaluation CoP membership and resources: "eXtension is the virtual venue through which the Evaluation Community of Practice (CoP) is accessible. The CoP serves as an evaluation resource for the entire Extension system. Since its beginning in 2010, CoP leaders and core members continue to develop, identify, review and post frequently asked questions and answers (FAQs) about evaluation, Moodles (online courses), appropriate fact sheets that support evaluation efforts among Extension personnel. The CoP uses eXtension features to make these resources available.")*
11. Is there anything else you'd like to know or share?
12. How many years have you been employed with Extension?
13. What is your position program/area of expertise?