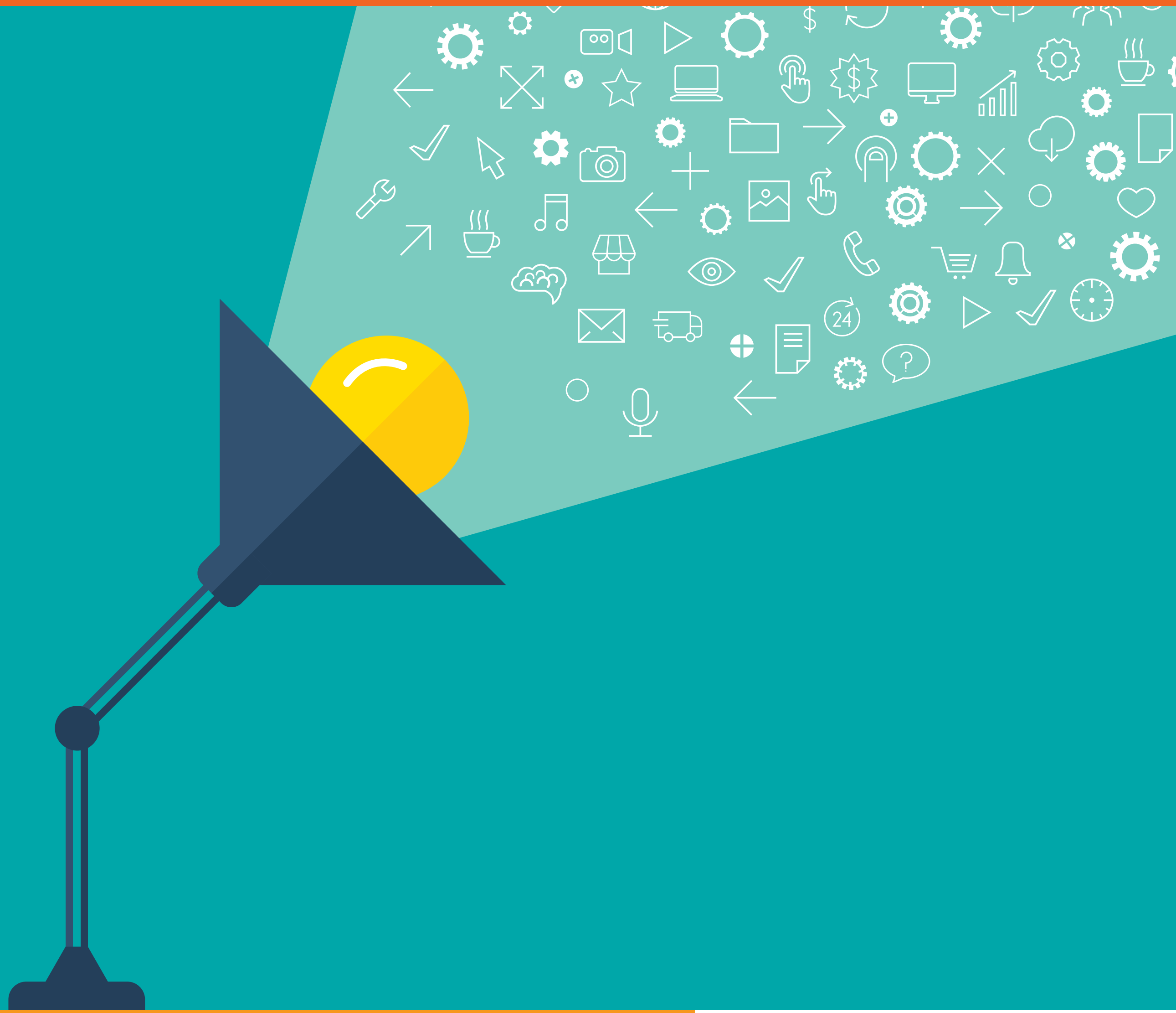
EVALUATION COACHING

LIGHT UP YOUR CLIENT'S EXPERTISE



B3 Consults

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A SHORT STORY

I remember the first time I realized that coaching had to be a critical part of my skill set as an evaluator. I was working with a nonprofit as their evaluation consultant, but since I wasn't effectively tapping into my client's perspective, we were stuck.

I had been asked to facilitate a meeting to help the team increase their adoption of a new data system for tracking clients. Implementation had been bumpy, and I was to provide technical assistance. Within ten minutes of starting the presentation, I realized the manager was disconnected from the motivations of her staff, and one person was clearly checked out. So I took a chance and sought to just learn about this frustrated "stuck" staff person's perspective.

She told me she did not want to capture data, that it felt impersonal.
Her job was to help individuals and compassionately navigate them through their journey. To capture the data her boss was asking for with the new system would require putting a computer between her and her client, and she effectively refused to do it.

So I asked open-ended questions about what mattered to her, what fed her heart, what made a better relationship with clients. We started with *"Tell me about a recent client you are proud of."* And she did. She lit up, she could tell me all the accomplishments — this program had helped someone buy their first home. She spoke of the value of respect, and sharing in the joy of her client's accomplishment.

What she couldn't tell me, however, was how far the client had come. She also realized, in describing her client's journey, that the client had met with several other staff and that she had asked this client questions that the client also had answered for others.

And then the whole room shifted. Not just this one person, but the whole room. As this one person got in touch with her connection to the work and the potential power of evaluation to help strengthen that connection, it was as is if she voiced that power for everyone in the room. And with that shift came the openness and energy to chart a path ahead that I alone, as consultant, never could have envisioned.

Betsy

Betsy Baum Block, Author

LET'S DO MORE COACHING

Our evaluation engagements with clients are time- and resource-limited.

This means the people and organizations we work with need to build and retain their own capacity to be more evaluative. To help them build that capacity, we need to prioritize and support their evaluation leadership and expertise.

Similar to building equity in our practice by using community voice to help shape the evaluation design and process, we can be stronger as evaluators by prizing the value our clients bring to the table **over** our own expertise, so that they are equal partners in the evaluation process and participate in building their own evaluative capacity. Prioritizing client leadership and expertise requires us to incorporate coaching into our engagements.

The practice of coaching is gaining momentum in the evaluation profession, and more evaluators are including it in their skill set. But less clear is the degree to which evaluators are using coaching practices that adhere to the tested and evidence-based practices that accrediting coaching bodies endorse.

This brief offers an introduction to the use of coaching in evaluation capacity building. It is for internal or external evaluation consultants who work with nonprofits — particularly nonprofits that are resource constrained and need to rely on their own internal capacity to design, implement, and learn from evaluative processes. It is especially directed at evaluators who can benefit from more fully integrating evidence-based coaching practices into their work.

“More coaching” means adapting critical coaching practices into your evaluation-capacity-building work

The addition of coaching practices into evaluation-capacity-building efforts signals our willingness to shift the power dynamic in the consultant-client relationship so that it values the expertise of clients. Where “helicopter consultants” can create quick fixes and temporary infusions of strength, coaching more sustainably strengthens organizations and the individuals who work in them.

Most evaluators are not formally trained in coaching techniques. In fact, coaching leans away from what the evaluation profession espouses as core competencies. While the use of coaching is valued and growing in nonprofits, it is most frequently targeted at high-level managers as part of their professional development but largely ignores mid-level managers or evaluation staff.

Coaching as one of three critical approaches of capacity building

Coaching comes at evaluation capacity building with a frame of mind that creates a powerful shift in clients. Coaching is less about what you “do” and *more about how you hold yourself (or “be”)* – focusing on your and your client’s disposition in accomplishing the work ahead.

APPROACHES FOR CLIENT INTERACTION

	Consulting	Mentoring	Coaching
Where your expertise ( ) is, relative to your client ( )	**Your expertise leads, and you have something to give the client.**	**You share your expertise, and the client learns and then steps in.**	**The client is the expert, and your goal is to light up that expertise.**
When to use it	↘ When the client has the capacity to use the product you provide, and you are completing a task that fills a particular objective.	↘ When the client has some capacity and has requested your expertise to help them stretch and grow. ↘ When the goal is to develop the capacity of an individual or small team so they can repeat the work with minimal support.	↘ When the client's need is deeper than just a single product, and the whole ecosystem in which the work is situated needs to be considered. ↘ When the imperative is to leave behind a system independently capable of repeating the work. ↘ When you want to build the client's overall capacity.

We can come to our evaluation capacity building engagements with three distinct approaches—consulting, mentoring, or coaching. Where and when we use each approach depends on the client's ask and the situational context.

The "Approaches for Client Interaction" table offers guidelines on where and when to use the three approaches in client-facing work. These are offered as a spectrum, to help you identify in any given project or moment, when you might be holding critical expertise versus when your client's expertise is important to emphasize and build.

Consulting is useful when our professional experience and expertise as evaluators is important and when the client's "ask" for the project is explicit and their business model does not support developing specific staff expertise. At those times, the client needs a transactional consultant to hand over a product. Most other times, leaning toward a mentoring or coaching modality can benefit the project and the client relationship.

What is different about coaching

Coaching is a means of engaging with the client that departs from consulting or mentoring in its openness and client-led approach. As part of evaluation-capacity-building work, coaches:

Open up the evaluator in the client's identity, and accelerate momentum.

Our behaviors and choices are impacted by our perception of ourselves and our roles. When we are primed to consider ourselves as having a particular identity — like being an evaluator — we often behave in ways that fit with that identity and its perceived characteristics. Shifting a person's perception of his or her identity can have major impacts on that person's behavior.

Creating an identity shift that clients "are already an evaluator," or already have evaluative capacity that they can tap into, creates a shift in power over the evaluative process. The client gains momentum and can access more powerful solutions when they stop waiting for the consultant to have all the answers or expertise.

Engage the experiential

Actually moving your body during capacity-building work, and shifting your position within a room and in relation to others, creates a different and deeper knowledge base than the often-linear thinking we do when we stay stuck in the same position. Many evaluators are skilled at facilitation and use interactive exercises as a best practice. Adult learning research supports not only this method of active learning, but also experiential learning, which is the "direct sense experience and in-context action" where analytical reasoning is set aside[1]. Experiential learning takes people out of what they intuitively know, and pushes them to observe and reflect.

[1]Kolb, David A. Experiential learning: Experience as the source of learning and development. FT press, 2014. p.xviii

Find the systemic view

Certain types of evaluation (especially developmental or process) lend themselves to stepping back and examining the context or systems in which problems and client teams are rooted. This holistic view also is critical to coaching. If the purpose is to raise the capacity of the whole team, then we have to step outside of the defined problem or project to understand their whole system. It's like removing blinders and appreciating the complexity of the problem and where it lives.
As coaches, we must help our clients think more systemically about their programs or initiatives or evaluation challenges — and we should view our client as a whole system, as well.

When you decide to coach, it helps to tap into *relationship system intelligence (RSI)* — an evolution of the more commonly known *emotional intelligence*. Coaching an entire team relies in part on building relationships that are founded on trust and credibility, not just with the coach, but among the entire team. RSI emphasizes "awareness and appreciation for the relationship itself,"[2] and has us look at the team as the entity we coach, not one individual or even the assemblage of individuals — and to hear the voice or common will of the team. This approach aims for an "upward spiral of dynamic interaction" to access the team's collective intelligence and generative creativity and enable powerful problem-solving.[3]

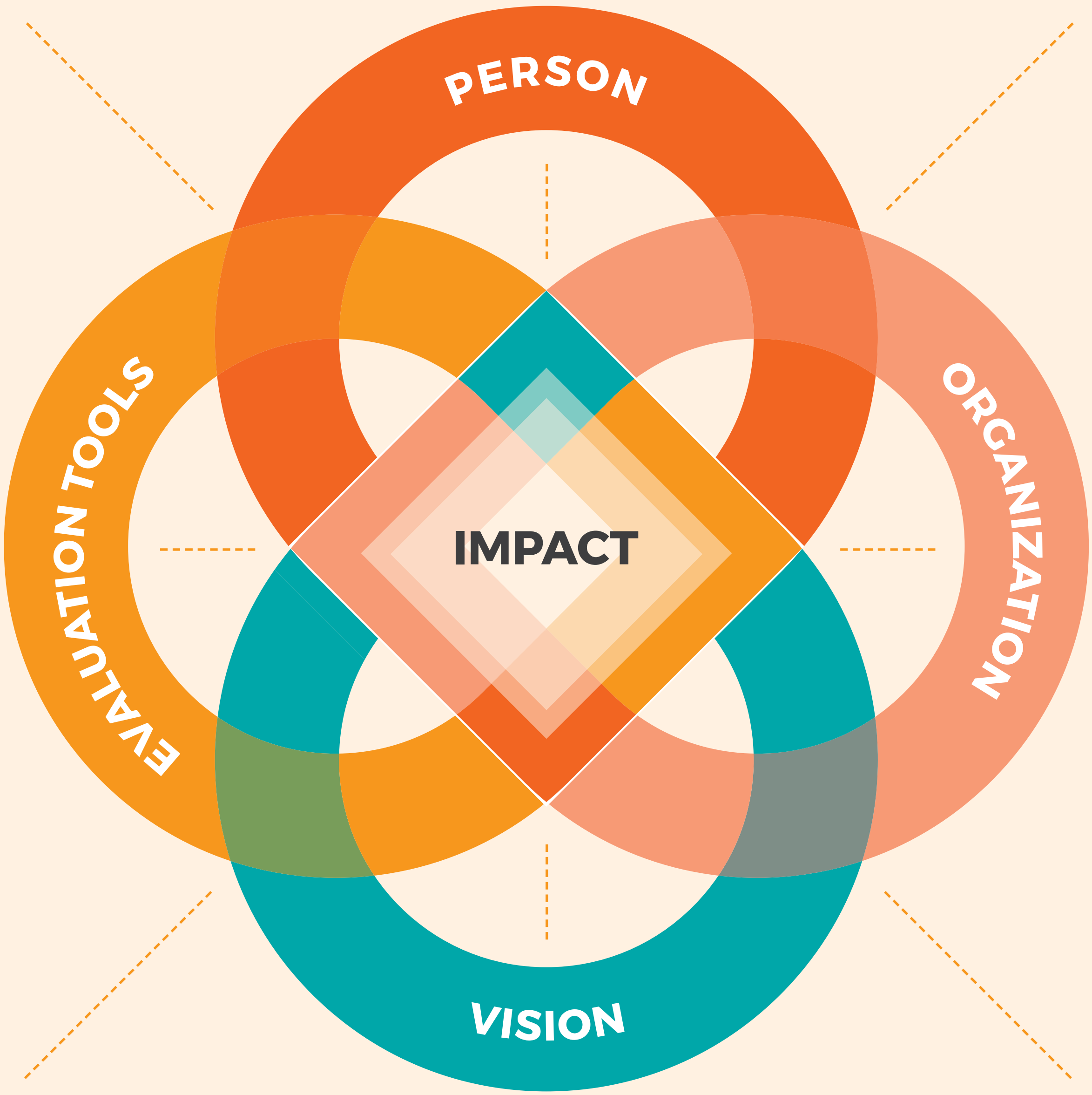
[2]Anne Rød and Marita Fridjhon, Creating Intelligent Teams (Randburg, 2016), p.xii.

[3]Ibid, p.22

TO COACH MORE POWERFULLY,

FIRST EMBRACE THE INTERCONNECTED SYSTEM

THE FOUR PRINCIPLES OF COACHING TO BUILD EVALUATION CAPACITY



1 Each Person is creative, resourceful and whole.

You have to believe that the person across from you has the best answer, not you. When that person can answer "what becomes possible for me," then you can often unlock creative and powerful approaches to the work.

2 The Organization is naturally intelligent and creative. And complex.

Sometimes we instinctively observe symptoms of organizational challenges clients are experiencing (e.g., founder's syndrome, frequent reorganizations, financial strain) that have an impact on evaluation capacity and process. Coaching involves intentionally listening for these organizational issues and dynamics and the impact they are having. Rarely do we get the whole of the system in the room during our client engagements. Coaching tools allow us to grab the "voice of the system" through the individuals that are (and aren't) in the room[4]. When coaches can create connection between different parts of the system (e.g., finance or legal or program) and focus on the more holistic entity of the team, the team builds a more vital connection to evaluation capacity building.

[4] "The relationship system is naturally intelligent and creative" is a cornerstone of Organization Relationship System Coaching.

Every organization has Evaluation Tools that can serve as a foundation.

If we had a nickel for every time a client apologized for using Excel or Google Sheets, we'd have a lot of nickels. In reality, whatever tool they have is a reflection of where they are in their current capacity. Highlighting that they are actually achieving some success by even having those tools creates a stronger bridge to where they want to go.

Tapping into Vision and inspiration will give deeper engagement.

While we often think about an organization's mission as what motivates people to work there, we often overlook appreciating individuals' unique vision and distinct connection to the work. If we can tap into that, we'll unlock more potential for building evaluation capacity.

When someone is in tune with their own purpose, their own vision of what they want to become, it acts as a "tuning fork" about what impact they will have on the world and the role of evaluation in helping them to have that impact. When people are most resonant with their vision for themselves, they tap into the deepest power of what they can and will do. It also helps connect them with their own belief that they are creative and capable.

Author's Note: These principles give a light touch to what credentialed coaches s pend many hours training on and practicing.

CONNECTIONS BETWEEN THE FOUR PRINCIPLES

Each of the four principles stands on its own as a critical element of shifting into the coaching mindset during evaluation capacity building. Beyond that, the connection of each principle helps us understand organizations more deeply and look for where strengths or system failures might exist.

The four principles are vitally connected. If any one is not emphasized, the power of the coaching engagement is ruptured.

Two Principles	When the connection between the two principles is successful, the client will say:
Person **Vision**	"I am inspired and engaged and see opportunity for action and leadership."
Person **Organization**	"We build on the power of individuals, and the whole is greater than the sum of our parts."
Person **Evaluation Tools**	"I take ownership and see value in using evaluation in my job."
Organization **Evaluation Tools**	"We have the right tools for how our organization works. Yes, even if it is Google Sheets."
Organization **Vision**	"We are a mission-driven organization, beyond just saying that."
Vision **Evaluation Tools**	"Our evaluation is more powerful because we feel the connection of "why we do what we do" in our logic models, theories of change, outcomes, or reports."

THREE COACHING TOOLS TO GET STARTED

Try using these tools in your evaluation-capacity-building practice to experience the difference between coaching and consulting.

Because clients might be used to more traditional and transactional consultants, one key tenet of coaching is ensuring that you have designed your alliance (or agenda) with your client, and laid the foundation for using these types of approaches. They might feel different to the client.

A PRACTICE

1. POWERFUL OPEN-ENDED QUESTIONS

A mentor coach once said to a new coach with a strong consulting background to "stop asking such smart, long questions. Go for short, dumb ones. And wait." Although this works against every grain of the quick-firing mind of most consultants, these short questions can fundamentally shift conversations with clients.

Who and when?

Use this tool primarily when engaging on a new project, when scoping or kicking it off. Powerful open-ended questions are also useful when you feel a disconnect in the work, or at critical points in the timeline (moving between major phases).

If the group is large, sometimes you can use small-group conversations and have the answers build on and inform each other. Coaches speak frequently of revealing the system to itself — generating understanding from within the system brings with it awareness of the individuals' responsibility for that system, and their commitment and energy to identify *and* implement solutions.

OPEN ENDED QUESTIONS

What you used to ask	Try instead	What's different	Pro tip
What's the goal for this engagement?	What do you want?	Avoids narrowing and focusing in a way that misses opportunities to understand what the client really needs.	You might have to remind the client to think about the whole organization and its mission when they answer.
How will you use this product, and what will it help you achieve?	What becomes possible?	Takes the focus off the product itself, and give the client room to dream a little. While this seems subtle, the goal is to get the client to think more expansively about what is possible, beyond a transactional product.	You might need to ask the question, "And then, what becomes possible?" multiple times in a row, until the client identifies what they want to shift.
What barriers do you see?	What are you tolerating?	This forces the room to get out of "you" or "me" and really think of the organization as a system of which they are all a part.	If they get stuck on or seem clearly attached to some big negative, ask, "What 2 percent of that do you need to keep to inform ideas about moving ahead?"
What are your evaluation skills?	Where does your expertise in evaluation live?	Recognize that the client is an expert and that they already have some evaluation capacity.	After this, ask about what skills they want to build on, and where they can get that expertise.
Can you give me some background on the project?	What brings us here?	The goal is to widen the scope from the narrow frame of the project or product in question, and get to a more holistic/systemic take. Listen for organizational and relationship dynamics, and maybe even follow up with "What does this organization yearn for?"	This is often an iterative question of getting the client to step back, and where you have to trust your intuition that your client has a deeper sense of organizational context — the impact of funder motivations, leadership transitions, staffing constraints. These issues are far from uncommon but are highly relevant to how the organization can best build its evaluative capacity.

AN EXERCISE

2. OCCUPY THE LANDS OF THE FOUR ENTITIES

“Lands” work takes your client on a physical journey through their organizational system so that they can inhabit and view it and a particular challenge or opportunity from the perspective of different roles or positions.

Who and when?

Use this tool to generate clarity about the needs of the whole organization, particularly when the consultant has a sense that the different members of the team are voicing disharmonious needs.

What you used to do

Most consultants facilitate sessions to capture client feedback about particular products, challenges, or ideas, asking individuals to voice only their own perspectives.

Try instead

1. Create the space. Put tape on the ground that establishes the four principles discussed above (person, organization, vision, tools) as “lands,” or alternately ask a person in the group to take you to any part of the room that represents the “land” of one of the four principles. Always let the client lead to which principle’s land they want to go to first, by randomly selecting a participant.

2. Move the group. Physically move the entire group to the area of the room that each land occupies. Make sure everyone arrives, and ask them to get comfortable in the space.

3. Ask the group to speak with the voice of that land. Instruct everyone to speak in first person as that entity. “I feel” when you are in the land of the *evaluation tools* means you are speaking with *the voice of the evaluation tools*. Give plenty of examples and prompts, along with gentle correction. For example, a client might say, “I feel like people just fill my intake form in without being thoughtful.” However, if a client loses the first person, and says “Their form is overly complex and asks too many things” you can offer a careful correction, “So the evaluation tools might say ‘My intake form is overly complex and I ask too many things.’”

4. Check in. Make sure folks are ready, and ask how it feels to be in that land. Join the group and model. And continue to give examples.

5. Access the wisdom. Ask open-ended questions that give everyone a chance to see what is happening at their organization from all the perspectives.

- What’s the opportunity of being here?
- What’s the challenge of being here?
- What do you want the whole system to know about you?

When you are done with one land, move to the next.

What’s different

Imagine someone speaking in the voice of the evaluation tools to the whole organization, saying: “We are in this together. You can’t do this without me.” Or a person to the evaluation tools, “Stop making it so hard for me” or “Stop wasting my time.” Interpreting this, along with other statements expressed during the exercise, you might find yourself speaking about the tension of the heaviness of the work, compared with the vision of the people and desire to impact. The power of naming that shifts what and how you and the client need to move forward.

Pro tips

Wait for it! Sometimes people, particularly those who are introverted, need a minute to process and follow. Scan faces to be sure.

Model it. Offer your own insights, without weight or attachment. Let people disagree with you, too!

AN EXERCISE

3. LUMINOUS VISIONS

With coaching, a critical aim is to ensure that those involved feel energized about the work, excited about it, and fully engaged in moving ahead.

Who and when?

Use this tool when detecting a deep lack of energy on the client side, and when several or many people appear checked out or dismissive of the work.

What you used to do

We've all done introductions where everyone introduces themselves and their function, and maybe even an ice breaker where everyone reveals two truths and a lie about themselves (still love this!). While these exercises help to build group identity and cohesion, that is different from seeing participants truly engage and come alive.

Try instead

Instruct the room as follows:[5]

> *For the next five minutes I want you to go up to someone, whether you know them or not, and ask them, "What are three things you love about yourself?" When they are done, say, "thank you" — and then you will switch roles. After you have exchanged, move on to the next person and repeat.*
>
> *No conversation, no response, no explanation. Keep it simple — your three things and "thank you." You can say the same three things over and over, or you can change it up. However you see fit.*

What's different

Done well enough, you will hear and see a change in the room because you are lighting people up by connecting them to what drives them. This elicits compassion and excitement and a series of good emotions, and every person's sense of "what is possible" expands.

Pro tips

This works best in larger groups, though you may be able to adapt it effectively with smaller groups. For example, pairs in the smaller group can interview each other with a list of questions like, "What was the last event or experience that left you exhilarated?" And then have the pairs share out what they learned.

[5] This exercise is adapted from an amazing coach and colleague, Susan Carlisle.

CASE STUDY

LOS MEDANOS COLLEGE TRANSFER ACADEMY

A colleague and I were invited to do a retrospective evaluation project with the Transfer Academy program at Los Medanos College in California, a Hispanic-serving institution. The program aimed to help students at this community college transfer into four-year colleges, and it was winding down a federal grant that supported the program.

Where we started

The original request came through one of the program's founders. While it was a request for help with data analysis, the founder also identified that the program needed an evaluation framework moving ahead. Our job was to develop that framework and a plan they could implement.

What we did differently at the beginning

We asked two questions that revealed a lot about the whole program and system:

1. Why are we here?
While the task was to help them assess their program at the end of the five-year federal grant, we trusted our sense that there was more to it and asked again. What we heard was a deep personal commitment to

the program but some underlying concerns about its sustainability. We learned that they struggled to talk about student experiences after the first year, even though they had anecdotal evidence of the program's power.

2. What will be different if we do an amazing job together?
This is a variation on the "what becomes possible" question and takes the focus into the future and off the product we were hired to create. We asked this question at the beginning of our engagement, and again later during the project. We learned about how they care about and want to create an embracing environment for the students who participate in the program, and about what motivated them to work on the evaluation beyond providing required evidence.

And yes, we did some consulting

After the initial engagement session, we entered a logic modeling process that would serve as the backbone for the evaluation framework. Because this process incorporated some of their vision and deep connection to the program, the process went quickly and felt satisfying. The team members expressed that we had captured the "heart" of the program.

What we did differently in designing the evaluation plan

Like many consultants, we then held a participatory sense-making session in which we talked about available data and program outcomes as they related to the logic model. During that session, however, we stayed away from making the conversation completely technical and focused instead on getting the group to listen to one another's "lands." While the group was deeply connected to the program's vision, they also worked in discrete silos and rarely had time to look across at one another's work and get a broader view of what they hoped was happening in the program. Fortunately, this group had good working relationships and a trusting, intuitive awareness of how they operate as a system. We included two critical questions in that process to ensure we considered the whole system:

1. Why are *you* here?
We wanted to understand their individual vision and passion for the work, and bring to life their desire and excitement for the program. During our interviews with one of the program's founders, she made it clear that this program was built and thrived on the personal commitment of the individuals in the room — but that had not yet extended to supporting more evaluative measurement. To build internal capacity for the evaluation, we would have to link it to their personal commitment; so we started with understanding that.

2. What will you do?
Rather than narrow it to building a plan, we waited for individuals to talk about their interaction with students in the program, what they saw as valuable, and to gain a sense of what they wanted to bring to the evaluation.

And then we did some data analysis

After this session, we worked with the staff to tap into some existing data sources, filled in where they needed us to fill in, and gave them more muscle in their analysis. We helped fill an immediate need, which also helped to model the value of data and evaluation to their work.

Our final analysis as their starting point: Build from vision

For the final presentation, we delivered preliminary data analysis that created a working plan for the organization to do their own evaluative work moving ahead, and focused on crafting agreements within the team to do so.

We came back to the relationships and those commitments they sought during the planning phase. We didn't tether them entirely to what was realistic and within constraints, we tried to push in the areas that came alive for them, their desire to know, "Where are my students now?"

So how did it work?

Six months after, we received an enthusiastic message from the co-founder and dean, letting us know how they had continued to surge ahead and implement the evaluation plan. We believe it was because the approach deeply reflected and built on the team's vision and commitment to the program, as well as a reliance on the relationships and systems they already had.

COACH, AND MORE POWERFULLY

Anyone engaged in capacity building feels ecstatic when the light bulb goes on for a client — when the client grasps what they are doing and is ready to run with it. Too often, we wait for the end of the engagement for these light bulbs to go off, and sometimes those light bulbs rest with one person and don't stay lit after we leave. The power of coaching is illuminating and electrifying the entire system from the beginning — seeing, hearing, acknowledging it in a way that few consultants do.

Coaching is definitely a journey, and early success will inspire you to find more resources and deepen your practice.

Opportunities to learn

- Read up on how coaching works with examples from the International Coach Federation.
- Read Creating Intelligent Teams by Fridjhon and Fuller.
- Take an Organization and Relationship Systems Coaching introductory class: ORSC or ORS@Work Training.
- Learn about the power of leadership coaching in nonprofits.
- Get grounded in equitable evaluation practices through the Equitable Evaluation Project.

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Betsy Baum Block has worked with individuals and organizations in all sectors to achieve their best possible outcomes. Her life path has been full of rich experiences that have informed her diverse and unique approach that is results-driven and impact-focused. As a founder whose experience spans small-business development, telecommunications software development, government performance auditing, nonprofit evaluation/performance management, and life/career coaching, she has the experience necessary to connect to and support community leaders and change makers.

Betsy holds a Masters of Public Policy from the Goldman School of Public Policy, in addition to being a Certified Professional Co-Active Coach (CPCC) through the Coaches Training Institute and an Associate Certified Coach (ACC) through the International Coach Federation. Contact her at betsy@b3consults.com and learn more about her work at www.b3consults.com.

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