Evaluation: Why, What, Who, and Some How

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Agenda

- Introduction
- Objectives
- Setting evaluation context
- Evaluation
- Issues
- Review
- Questions and Answers

Perspectives

"In times of change, those who are prepared to learn will inherit the land, while those who think they already know will find themselves wonderfully equipped to face a world that no longer exists." - Eric Hoffer

Objectives

- Understand subjective and objective nature of evaluation.
- Recognize process and methodological choices for conducting evaluation.
- Recognize importance of contracting phase for establishing evaluation agreements.
- Appreciate value that evaluation can have for stakeholders.

Setting Evaluation Context

- About stakeholders
- Evaluation can answer programmatic questions
- Evaluation can address data issues
- Best practices
  - When to discuss and decide evaluation issues
  - What model to use

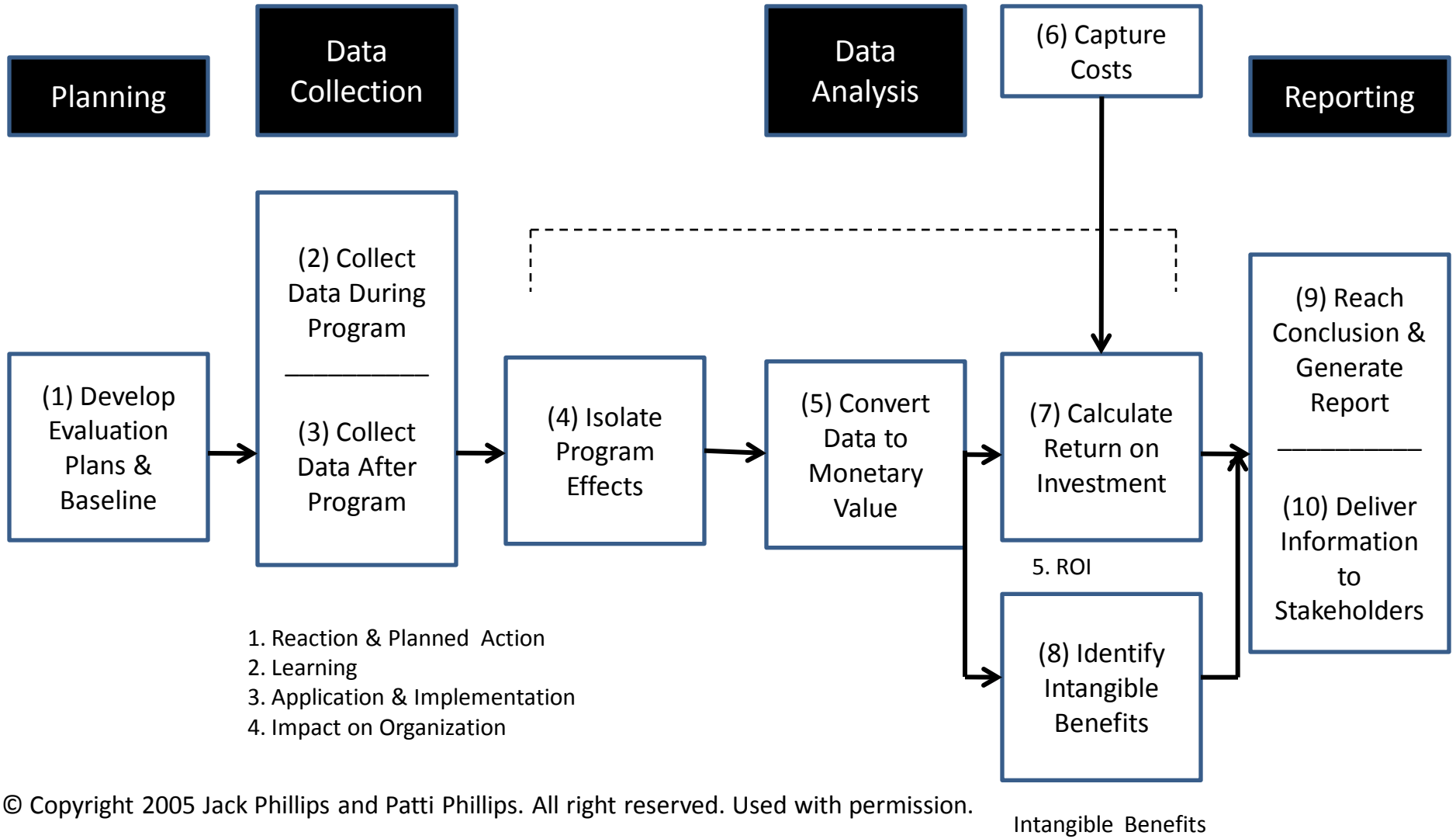
Five Ways to Evaluate Any Intervention (like Coaching Program)

- Level 1: Reaction and planned action
- Level 2: Learning
- Level 3: Application and implementation
- Level 4: Impact on organization
- Level 5: Return on investment (ROI)

- Intangible benefits

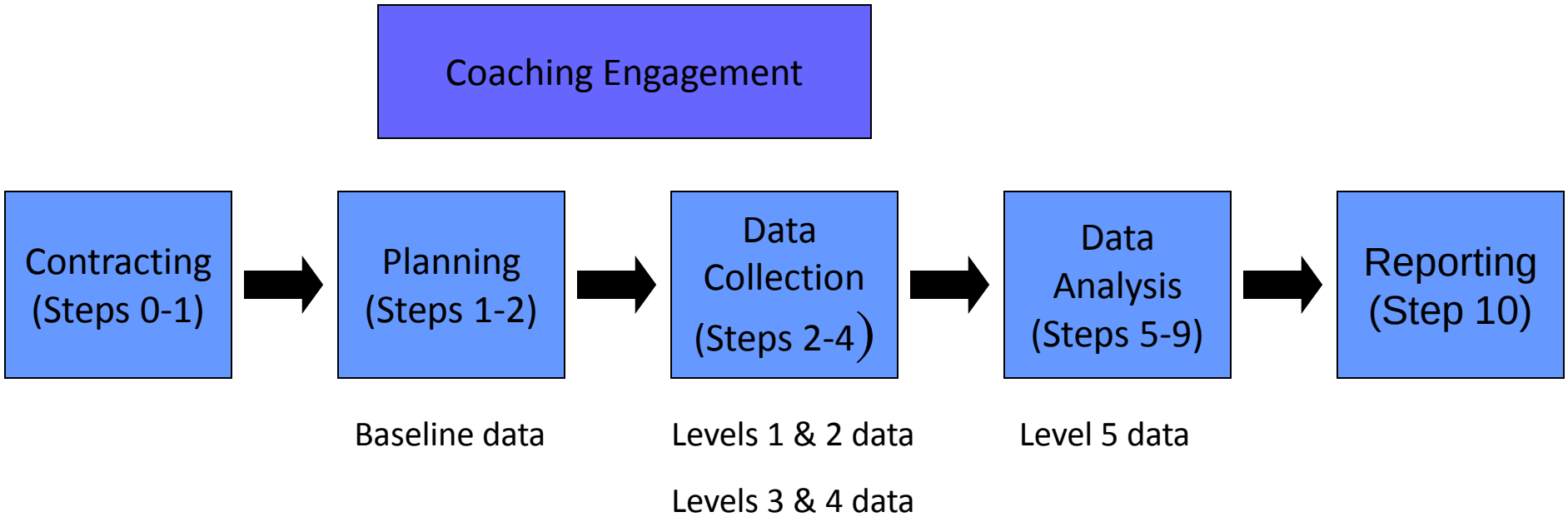
Source: Phillips, 2003, pp. 34-36

ROI Process Model™



ROI Process Model™ and Contracting

Four evaluation phases, plus something to set the stage:



Sources: Lazar (2006a); ROI Institute (2007), p. 29; Patti Phillips, personal communication (2007)

About Evaluation Levels

As the evaluation level goes up (from 1 to 5),

- Value of the information
- Frequency of use
- Time and cost to complete
- Difficulty to perform
- Relevance to clients (coachees)
- Relevance to customers (executives and decision makers)

Factors That Support Evaluation of Interventions

- Identify outcomes and success measures
- Contract for measurement and reporting
- Develop evaluation plan
- Get management alignment and support
- Implement well

When Contracting Goes Badly, What Are the Likely Impacts?

- Unfulfilled expectations about:
  - Process followed
  - Boundaries honored
  - Outcomes achieved
- Damaged relationships with:
  - Sponsors
  - Stakeholders
  - Coachees
- Reduced likelihood for future opportunities

Source: Lazar (2006a)

Evaluation-related Topics During Contracting Phase

- Evaluation levels used per stakeholders
- Data access
- Choice of data collection methods to use
- Likely enablers and barriers
- Initial choice of isolation method
- Roles, responsibilities, and accountabilities
- Reports, timing, and recipients

Source: Lazar (2006b)

Data Collection Methods

Method	L1	L2	L3	L4
Questionnaires/Surveys	✓	✓	✓	✓
Tests		✓		
Interviews			✓	
Focus Groups			✓	
Observations		✓	✓	
Action Planning			✓	✓
Performance Contracting			✓	✓
Performance Monitoring				✓

Source: Phillips, 2003, p. 102

Why Isolate Program Effects?

- Accurate, relative attribution of cause and effect
- Conservative attribution of coaching
- Coaching may be part of complementary processes (and have to account for different process owners)

The Process to Isolate the Effects

1. Select isolation technique(s)
2. Build into contracting discussion or subsequent conversations
3. Identify other performance improvement factors
4. Isolate coaching program effects from effects due to other factors

Evaluation Issues/Challenges

- Insufficient time
- No needs assessment
- Unclear objectives or program intent
- No help

Five Approaches to Evaluation

- Don’t evaluate. Assume coaching program benefits & value are already recognized!
- Don’t evaluate. Trust in anecdotal evidence.
- Be reactive. “Plan” & implement at end of program.
- Be somewhat proactive. Plan & “align” with client during program.
- Be proactive. Plan & align with client during contracting phase. Coordinate with client during program.

Review

- Proactively contract for coaching program and plan for its evaluation
- Tie evaluation efforts to stakeholder cares & program objectives worth proving
- Select tools appropriate to evaluation levels to implement
- Isolate effects of program
- Make credible claims of results

Questions and Answers

Perspectives

"Learning is not only adding but a reorganization of what already is." – Milton Erickson

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About John B. Lazar, MA, MCC, NCOC

John has worked within organizational performance improvement framework for over 27 years, providing coaching and consulting interventions during that time. He has a Master's degree in clinical and developmental psychology. Trained by Newfield Network, he has been certified as a master coach by the International Coach Federation (ICF) since 1999.

His performance consulting and executive coaching firm, John B. Lazar & Associates, Inc. (www.lazarconsulting.com), works with organizations (from entrepreneurial ventures to small and midsize family-owned firms to Fortune 50 companies) to create emotionally intelligent leaders, motivated performers, workplaces that work, and business results. He has presented at numerous local meetings and international conferences on a variety of topics in the U.S., Canada, Mexico, Belgium, Spain, China, Australia, and New Zealand.

John is co-founder and executive editor of the *International Journal of Coaching in Organizations* (www.ijco.info), now in its eighth year of quarterly publication. He is a founding member, the former Acting Executive Director, and current President of the Board of the International Consortium for Coaching in Organizations (ICCO, www.coachingconsortium.org).

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