

## THE CHANGING ROLE OF THE EVALUATOR IN THE PROCESS OF ORGANIZATIONAL LEARNING

Miri Levin-Rozalis  
Department of Education, Ben Gurion University of the Negev  
Beer Sheva, Israel

Barbara Rosenstein  
Freelance Evaluator  
Beer Sheva, Israel

**Abstract:** In this article we examine the role of the evaluator in the process of organizational learning, and discuss the conditions necessary to facilitate the productive execution of such a role and the consequent ramifications for evaluation. First, we describe the process of organizational learning as presented in the literature of organizational learning. Second, we examine the demands that process presents to evaluators. Third, we discuss organizational learning within the context of participatory evaluation, and then explore the role of the external learning agent. Finally, we present some major changes in the role of the evaluator, changes that stem from the very nature of the organizational learning process. The focus on organizational learning transforms the role of the evaluator to one of knowledgeable facilitator who returns responsibility of the operation, development, and evaluation back to the project/program or organization. We conclude by acknowledging the difficulties involved in changing the traditional role of the evaluator, particularly in giving up control of the evaluation to the stakeholders and letting the organization become the “owner” of the evaluation process and knowledge, leaving the evaluator the important role of facilitator. The evaluator is responsible for the *procedures of learning* — providing tools and monitoring the learning that goes on. The *learning content* is the responsibility of the organization and not of the evaluator. While we do not preclude the traditional role of the evaluator, we do suggest a significant change in the procedures involved in evaluation, in the skills required to conduct effective evaluations within the organizational context, and in the ownership of the knowledge that emerges from such evaluation.

---

Corresponding author: Miri Levin-Rozalis, Ben-Gurion University of Negev, Dept. Education, P.O.B 653 Beer-Sheva, Israel 84105; <rozalis@internet-zahav.net>

**Résumé:** Dans cet article, on examine le rôle de l'évaluateur dans le processus d'apprentissage organisationnel, et on discute les conditions nécessaires pour faciliter un rendement efficace dans ce rôle ainsi que les conséquences pour l'évaluation. Tout d'abord, suite à une revue de la littérature, on décrit le processus d'apprentissage organisationnel, et on examine les exigences du processus pour les évaluateurs. L'apprentissage organisationnel est vu dans le contexte de l'évaluation participative, examinant le rôle de l'agent d'apprentissage externe. On présente des changements majeurs dans le rôle de l'évaluateur dus à la nature même du processus d'apprentissage organisationnel. En se focalisant sur l'apprentissage organisationnel, le rôle de l'évaluateur se transforme à un rôle de facilitateur averti qui réintègre la responsabilité pour le fonctionnement, le développement, et l'évaluation dans le projet/programme ou l'organisation. On conclut en reconnaissant les difficultés inhérents à un changement du rôle traditionnel de l'évaluateur, en particulier de laisser le contrôle de l'évaluation aux intervenants, ce qui permet à l'organisation de prendre en charge le processus d'évaluation. L'évaluateur adopte le rôle important de facilitateur responsable du processus d'apprentissage qui fournit les outils et suit l'apprentissage dont le contenu reste la responsabilité de l'organisation. Toutefois, en n'excluant pas le rôle traditionnel de l'évaluateur, on recommande un changement significatif aux procédures et compétences d'évaluation ainsi qu'à l'appropriation des connaissances qui découlent de l'évaluation.

There are two ways of spreading light — to be a candle, or the mirror that reflects it. (Edith Wharton)

■ The benefits of evaluation for organizational learning have become recognized (Cousins, Goh, Clark, & Lee, 2004), but not enough has been written about the demands that the process of organizational learning poses for the evaluator. In this article we examine the role of the evaluator in the process of organizational learning and discuss the conditions necessary to facilitate the productive execution of such a role. We claim that there are some major changes in the role of the evaluator, changes that stem from the very nature of the organizational learning process. First we examine the demands the process of organizational learning poses on evaluators, and then we explore the role changes required to fulfil such demands.

## THE PROCESS OF ORGANIZATIONAL LEARNING

Accelerating technological development and the accompanying accumulation of vast amounts of knowledge create a complex competitive environment that is constantly in flux. On the one hand, organizations, institutions, and policy-makers operate in unpredictable and dynamic surroundings of continually growing complexity. On the other, the needs and values of society change very rapidly. It doesn't matter if we deal with organizational learning as the acquisition of practical knowledge (Pauzke, 1989) or as a democratic and liberalizing process (Pedler, Boydell, & Burgoyne, 1989); the ability to adapt cannot be underestimated in the struggle to cope with these conditions, and the ability to learn is tantamount to the ability to survive (Argyris, 1992; Argyris & Schön, 1978, 1996; Banerjee, 1998; Easrerby-Smith, Snell, & Gherardi, 1998; Edmondson & Moingeon, 1998; Korland, 2000; Probst & Buchel, 1997; Richter, 1998; Senge, 1990; Snell & Chack, 1998). Consequently, organizations are required to move from a reactive to a proactive stance that initiates changes prior to the events (Preskill & Torres, 1999b; Probst & Buchel, 1997).

Organizational learning is a phenomenon that takes place in various forms within an organization. The broadest definition of organizational learning is the one provided by Argyris and Schön (1996):

Organizational learning occurs when individuals within an organization experience a problematic situation and inquire into it on the organization's behalf. They experience a surprising mismatch between expected and actual results of action and respond to that mismatch through a process of thought and further action that leads them to modify their images of organization or their understandings of organizational phenomena and to restructure their activities so as to bring outcomes and expectations into line, thereby changing organizational theory-in-use. In order to become organizational, the learning that results from organizational inquiry must become embedded in the images of organization held in its members' minds and/or in the epistemological artefacts (the maps, memories, and programs) embedded in the organizational environment. (p. 16)

The issue of organizational learning draws a great deal of interest both in academia and in practice. Organizations that do not learn

cannot progress because they continue to behave the same way as before, practicing behaviours that are no longer adequate to meet new challenges. In order to learn and adapt to new situations, organizations must focus on information, knowledge, and knowledge processing in real time and, where possible, in advance of events.

Argyris and Schön (1996) describe two types of organizational learning: single-loop and double-loop. Each entails a certain kind of organizational behaviour and each engenders a specific outcome. In simple terms, single-loop learning deals with strategic changes and more or less maintains the status quo of the organization. Double-loop learning deals with declared or underlying goals and engenders basic changes in organizational outlook and behaviour. Other definitions talk about processes in which the organization's members use knowledge actively in order to guide their behaviour and promote the continuing adaptation of the organization (Edmondson & Moingeon, 1998). According to this view, the learning is an activity of individuals that support the organization's ability to adapt.

Probst and Buchel (1997) see organizational learning as the organization's ability to identify mistakes and solve them and to change the organization's values and body of knowledge in order to create new skills. This is an ongoing process that continues throughout the life of the organization. (Such a perception views the organization as an entity in its own right rather than referring to the individuals of which it is composed.)

Argyris and Schön (1996) and Snell and Chack (1998) also view organizational learning as an activity carried out by a combination of individuals and the organization. They define organizational learning as including significant change in processes, structures, and assumptions of the organization and the connections among its members.

The process of organizational learning is not self-evident (Popper & Lipshitz, 1998). Rather, it is inherent in the nature of any institutionalized system. The very meaning of the word "institutionalized" hints at stability and at the tendency to resist radical changes or changes of any kind. Not only is organizational nature at stake, human nature is as hard to change. This is true especially when referring to well-learned and internalized assumptions, habits, and embedded procedures of behaviour such as work routines and theories-in-action (Watzlawick, Weakland, & Fisch, 1988).

Most writers in the field of organizational learning refer to the question of embedded behaviours and conceptions as cognitive maps. Moreover, they agree that reframing or changing these cognitive maps is a difficult task (Argyris, 1992; Forrester, 1987, 1990; Hedberg, 1981; Senge, 1990; Watzlawick et al., 1988). Organizations and individuals tend to protect their theories in action. It is inconceivable for individuals, groups, or organizations to identify both their own mistakes and the very routines that prevent these mistakes from being discovered. In order to overcome this difficulty, the process of learning must include at least two levels of learning. Thus, if we look at the processes of organizational learning we find several variations. The first level is personal, such as intuitive learning or learning through observation, imitation, or apprenticeship. These processes are difficult to verbalize and thus almost impossible to share (Rosenstein, 2002).

The second level is through interpretation or explanation of assumptions or procedures. At this level the knowledge is easy to communicate, particularly on an individual basis. When a group is involved, this process combines the individual cognition with that of a group. Such a process within a group has the potential to build a common language and common images, in other words common cognitive maps (Foil, 1994; Nonaka & Kono, 1998). On the one hand, such images and language can block true coping with problems and mistakes. On the other hand, they provide the bases for any organizational learning (Korland, 2000). Another important variable in this distinction is the nature of the knowledge obtained. True or false, for or against the organization, organizational knowledge no longer depends on individuals within the organization, but is the property of the organization itself (Crossan, Lane, & White, 1999).

There are several approaches to the issue of organizational learning. Argyris and Schön suggested that individuals perform the learning process. These individuals are the organization agents, and their role is to convert new knowledge to a kind of knowledge that is accessible for the whole organization (Argyris & Schön, 1996). Other writers claim that the process of organizational learning is a community process (Richter, 1998).

Edmondson and Moingeon (1998) compare the two most prominent writers on this issue of organizational learning, Senge and Argyris, and show how they share many basic assumptions. Besides combining theory and practice, both writers deal with tacit causalities and

the importance of making them explicit. Both Senge and Argyris emphasize the blindness of individuals in organizations to their own contribution to a difficult situation, and they both believe in the necessity of an outside facilitator (Edmondson & Moingeon, 1998).

The issue that all writers address is the issue of knowledge and information processing. Organizational learning deals with knowledge of people within the organization, knowledge that comes from outside the organization, knowledge that guides and misguides decision-making, and knowledge that informs and misinforms organizations, interveners, services, politicians, and decision-makers of all kinds and levels. Conceptualization of knowledge and knowledge building are at the heart of organizational learning.

#### ORGANIZATIONAL LEARNING AND EVALUATION

The obvious connection between organizational learning and evaluation is through knowledge and knowledge processing. Evaluation and evaluators deal with knowledge. They collect and analyze data. They then give it back as feedback, to help in decision-making and to improve performance. The kind of data evaluators have to deal with has been a subject of discussion since the very first days of evaluation. The demands on evaluators and evaluation in general have changed from the examination of operational and measurable aims in the 1950s to the demand for useful information for decision-makers and even to shaping the actual intervention in the 1970s (Nevo, 1989; Scriven, 1967; Stufflebeam et al., 1974). Later, the need for inventiveness became clear, in order to succeed in responding to the variety of project demands (Patton, 1981). In the 1980s and 1990s evaluators were not only expected to take into account those who could be affected by the activity of evaluation, they were expected to use the evaluation to restructure and to reframe the concepts and world-views of stakeholders (Abma, 1997; Drewett, 1997; Guba & Lincoln, 1989; Pawson, 1996). Evaluators were supposed to guide the organization toward becoming a learning organization through use of the recommendations of the evaluation. Evaluators can play an additional role of being the historian of the evaluand by assembling and storing information and findings that ensure that important learning will be kept (Preskill, 1994).

Thus the evaluator's role has expanded far beyond the examination of a specific program. It now includes the examination of overall policies of the organization that implements that program. It was

inevitable that evaluators would understand the potential of combining evaluation and organizational learning (Owen & Lambert, 1995; Preskill, 1994; Preskill & Torres, 1999a, 1999b, 2000).

Although the connection between evaluation and organizational learning seems natural, some issues resulting from the combination are not so clear. We pursue these issues further below. The first issue we address concerns the connection of organizational learning to types of evaluation with emphasis on participatory evaluation.

#### ORGANIZATIONAL LEARNING AND PARTICIPATORY EVALUATION

Learning organizations are organizations “where people continually expand their capacity to create the results they truly desire, where new and expansive patterns of thinking are nurtured, where collective aspiration is set free, and where people are continually learning *how to learn together*” (Senge, 1990, p. 3, emphasis added). A learning organization is a group of people who learn in a cooperative, supportive, and mutually advantageous situation. Through a process of meetings, discussions, cooperation, collaboration, and inquiry, the group solves problems, makes decisions, and over time changes the process of learning in their organization.

Old mental models and decision habits are deeply ingrained. They do not change on the basis of a single logical argument, even the most convincing one. Under pressure of daily operations, decision-making would revert to prior practice (Forrester, 1990). It is difficult to change a paradigm. According to Kuhn (1962), what causes a paradigm to change in the end is the accumulation of anomalies — observations that do not fit into and cannot be explained by the prevailing paradigm. The anomalies have to be presented over and over again because a social determination conspires not to see them. Challenging a paradigm is not a part-time job. It is not sufficient to make your point once and then blame the evaluatee for not getting it. Changes that organizations undergo are categorized as *transformational* changes. Transformational change in organizations involves radical change in how members perceive, think, and behave at work (Argote, 1999; Cummings & Worley, 1997; Walton, 1999). Lippitt, Watson, and Westley (1958) claim that in order for organizations to change, new patterns of behaviour must be developed in a stable and secure environment in which they can accept the change. An

evaluator can be the external change agent that promotes the learning that concerns these perceptions, thoughts, and behaviours. In Lewin's (1951) terms, the evaluator can aid in the process of "unfreezing-moving-refreezing" involved in organizational learning. The learning that leads to change is called *transformative learning*. Rooted in the practice of critical self-reflection (Mezirow, 1991), transformative learning occurs when the learner is able to take a very clear critical look at himself/herself, spurred on by a disorienting event similar to Dewey's roadblock. The evaluator can serve as a trigger for this kind of learning, which then feeds into the learning of the organization as a whole only if the evaluator can contribute to the feeling of safety. In order to generate and encourage learning, evaluation has to be inclusive and responsive. One way of achieving inclusiveness and responsiveness is through participatory types of evaluation. Evaluators, however, are often led by the false idea that the very act of studying a policy or an organization will alert people to question their action and that the process of examination by itself will cause change in behaviour. Such a misconception is responsible for the situation that we meet so many times about reports resting, unused, on the shelves. As far back as the early 1970s, Rippey (1973) wrote that although evaluation was a requirement of the United States Office of Education in the 1960s, most evaluations had been useless. Along one dimension, he attributed this phenomenon to the fact that most summative evaluations proved inconclusive and that most formative evaluations came too late. He proposed transactional evaluation to remedy the problem.

Evaluation has come a long way since Rippey gave his verdict. The participatory dimension has been recognized and normalized. Many forms of cooperative, participatory, collaborative, and empowerment evaluation have evolved over the past 30 years (Caracelli & Preskill, 2000; Cousins & Whitmore, 1998; Fetterman, Kaftarian, & Wandersman, 1996; Mertens, 1994; Owen & Rogers, 1999; Patton, 1997). The notion of participatory evaluation is not always clear, and some of its techniques and philosophies have been questioned over the years (Mosse, 1994).

Cousins and Whitmore (1998) distinguish two main streams of participatory evaluation: (a) practical participatory evaluation (PPE), in which the core assumption is that stakeholders' participation will enhance evaluation relevance, ownership, and utilization, in which the central function is fostering evaluation use with the implicit assumption that evaluation is geared toward program policy or organi-

zational decision making; and (b) transformational participatory evaluation (TPE), which is based on the assumption that people should control their own lives and should be able to evaluate their own actions. Rooted in the belief in social justice and emancipation of classes, genders, races, age, and the like, TPE uses participatory principles and actions in order to democratize social change.

Our perception is that TPE is better adapted to the combination of evaluation and organizational learning. The basic difference is that in PPE the stakeholders are actively involved in the evaluation, whereas in TPE the stakeholders control the evaluation. We base our assumptions on the distinction between interaction (relationships between two distinct entities) and transaction, which focuses on changes and on inquiry without any preconceived notions of truth or falsity (Dewey & Bentley, 1949). Unless the evaluatee plays a genuine part in the process of learning, no learning will take place. In order for genuine learning to occur, no participant in the inquiry can have a monopoly on truth. All parts of the inquiry are part of a free and open process during which changes and adaptations can be made at any stage. Critical reflection on one's own beliefs and assumptions and values are essential to sustainable change (Freire & Macedo, 1998). Such an approach is in line with the trend toward democratic process in evaluation (House & Howe, 2000). Therefore, we believe that in addition to participation, control plays a key role in the eventual use of the evaluation. Later work supported by empirical examples shows that no matter what kind of participation, the very existence of participation contributes to the process of learning (Compton, Glover-Kudon, Smith & Avery, 2002; Conner & Tanjasiri, 1999; Cousins, 2003; Gilliam et al., 2003; King, 2002).

Such raised awareness is in keeping with the trend toward transactional transformative evaluation (Caracelli & Preskill, 2000; Preskill & Torres, 2000) in which stakeholders are included in the learning process prompted by evaluation. Evaluation can be viewed on a two-dimensional plane: on one axis is the type of evaluation — summative or formative — and on the other is the method used for the evaluation, ranging from non-participatory to participatory styles. The matrix in Table 1 illustrates these two axes. For convenience we simplified the continuum of each axis into a dichotomy in order to examine its relationship to organizational learning.

The non-participatory column shows us that if evaluation is to be a trigger for organizational learning, the organization must take the

initiative. The process is conducted from the outside in. The organization may or may not use the evaluation findings. The evaluation itself plays no active role in use, disuse, or abuse of its findings. The same is true for both summative and formative evaluations.

In the participatory column, however, there is more chance for the evaluation to encourage or even to propel organizational learning, simply because stakeholders and organization members are partners in some or all parts of the evaluation process (deciding on evaluation question, collecting data, analyzing data, drawing conclusions). A high level of participation is required in both the summative and the formative types of evaluation. These functions in themselves are not enough, however. In order for evaluation to exert maximum influence over organizational learning, further steps are needed. Before proposing these steps, let us take a quick overview of the role of the evaluator as an external learning agent.

**Table 1**  
**Types of Evaluation and Degrees of Participation**

Type of evaluation	Method of Evaluation	
	Non-participatory	Participatory
Summative	Evaluation is conducted externally by an evaluator not connected with the organization being evaluated.	The evaluator and organization members collect data, perform analysis, and engage in interpretation, to varying degrees dependent on the level of participation.
Formative and ongoing evaluation process	The "external" evaluator gives feedback during the evaluation process in order to influence operations.	Members of the organization conduct a dialogue, prioritize issues, and collaborate on data collection, analysis and interpretation.

#### THE ROLE OF THE EXTERNAL LEARNING AGENT

Does learning within an organization rely only on inner knowledge, knowledge already existing within the organization, knowledge that is not accessible (because it is tacit or a property of individuals)? Senge (1998) suggests that this is not the case. He states the importance of systems thinking, a theoretical approach that in most cases does not exist in organizations. The evaluator can serve as an outside learning agent in such circumstances. Owen and Lambert (1995) trace the development of the role of the evaluator as an outsider,

first as an expert outsider starting with the role of information provider to help insiders, managers, and providers make decisions, becoming a source of enlightenment leading to the instrumental use of evaluation. With the development of theories and practice of learning organizations, however, Owen and Lambert suggest that the role of evaluation is to assist leaders “to look beyond discrete changes in key elements such as training, information and communication to seeing patterns of relationships with and beyond their organizations. In summary, the leaders need to be well informed on strategic aspects of their work” (p. 239). Although continuing with the status of “outsider,” the evaluator conducts a more interactive relationship with the stakeholder. Information gathering, however, is the responsibility of the evaluator, who then supplies it to the leaders. Gorodeski (2003) suggests a learning process that relies on the practical knowledge that is available for the participants. However, she sees a major role for the outside intervener. One of the roles of the outside intervener is to bring knowledge to the learning process. Three types of knowledge are involved: (a) theoretical and formal knowledge connected to the field under examination, (b) understanding of group learning processes, and (c) ability for reflective analysis. In her opinion, without outsider intervention, a closed system will be created that suppresses the emergence of new insights and understandings, and leads to the reinforcement of existing routines and patterns instead of the creation of new ones. Some other functions of outside intervention are to create time for reflection, to serve as a resisting force against the tight time schedule of the working place, and to serve as a catalyst that initiates unlearning, new learning, and new thinking (Gorodeski, 2003).

Unless on the payroll of the organization, an evaluator by definition is an “outsider agent.” What valuable service can the evaluator perform in such a capacity? As opposed to Owen and Lambert’s (1995) perception of the evaluator as “provider” of information and knowledge, we suggest that the evaluator no longer provides the stakeholder with information, but rather together, *they share and build knowledge as an integral part of the learning in a learning organization*. This suggestion is in line with Forss’s contention that learning takes place by combining involvement and communication (Forss, Cracknell, & Samset, 1994).

Thus, in addition to being able to reflect and learn alone or with selected stakeholders, the evaluator has to help the organization reflect and learn via providing new experiences, new interactions,

new information, or at least new ways of looking at old information. Stakeholders then act by improving, developing, or disseminating their programs. Such action takes several coexisting forms:

1. transformation of tacit knowledge into actionable knowledge,
2. creation of a body of accessible usable organizational knowledge,
3. program improvement based on informed decision-making,
4. organizational improvement based on the principles of learning organizations and knowledge management, and
5. dissemination of successful programs and actionable knowledge.

The evaluator must possess highly developed reflective capacities in addition to data collection and analysis skills in order to promote the above functions. The starting point for such reflection is based on the four types of knowledge listed in Table 2. The type of knowledge appears in the first column: new knowledge, collected knowledge (information), members' knowledge, and formalized organizational knowledge. The form of the knowledge is found in the second column.

**Table 2**  
**Knowledge Types**

Type of Knowledge	Form	Source	Location	Accessibility
Existing knowledge, new to the members of the organization	Information	Outside the organization	Experts in area, written documents	Formal, explicit
Formal, informal, tacit and explicit organizational knowledge	Documents, actions, procedures within the organization and its members	Collected from inside the organization	Staff and clients, documentation	Formal, explicit, tacit, informal, hidden
Member knowledge	Tacit and/or private	Collected from inside the organization	Individuals, teams	Implicit — Accessible only via reflection, transaction, and transformational learning
Organizational knowledge	Processed knowledge	All the forms of knowledge mentioned above	Participants in the OL process and facilitator	Explicitly embedded in the organization and accessible

New knowledge is in the form of information that the evaluator can bring into the organization from a variety of outside sources (current research, articles, or experience). Such knowledge is new to the organization, not new per se. Collected knowledge is drawn from within the organization and its programs. It is available through documents, observations, interviews, and the like. Members' knowledge is exposed through participatory reflective workshops, journal writing, and so forth. It is tacit knowledge that has to be drawn out and turned into explicit, actionable knowledge. Formalized organizational knowledge is a result of the combination and reprocessing of the other types of knowledge.

The third column lists the source of each type of knowledge. The location of the knowledge appears in the fourth column — evaluator knowledge, individual knowledge, team knowledge or organizational knowledge. The last column shows the accessibility of the knowledge: formal, explicit, or implicit.

All four kinds of knowledge must be rendered actionable and usable and should become an integral, public, and accessible component of the organization's knowledge. This is possible through the formation of a learning organization in which the participants perform the functions listed below.

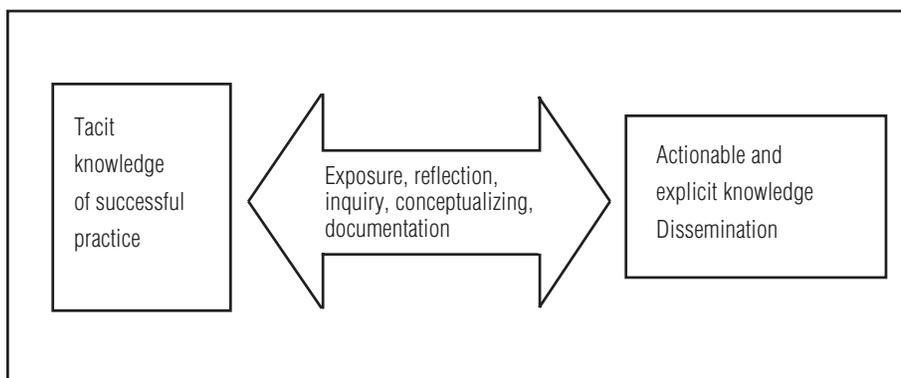
- *Transform individual knowledge into shared organizational knowledge.* For example, in a project for empowering Ethiopian immigrants to Israel, all of the professional workers knew a lot about Ethiopian cultural codes, customs, and beliefs on their own and used that knowledge during the everyday work. However, this knowledge was not perceived by them as part of their professional knowledge, never became public organizational knowledge, and was not taken into account, for example, while planning and implementing new programs. Reflection was the tool for reaching existing knowledge and turning it into usable knowledge that remains an integral part of the repertoire of the organization.
- *Transform tacit knowledge into actionable knowledge.* For example, in a project for knowledge management in a social services department, social workers were unaware of the special quality of the work they were doing (Rosenstein, 2000). They thought that “everyone worked that way” or that they just did “what came naturally.” Of course these comments constitute the definitions of tacit knowledge. The evaluator had to persist in asking, “What did you do? How

did you do it? Be specific. Explain further.” The role of the advisor/evaluator was often to refuse to be satisfied with the obvious. For instance, in trying to document a successful intervention in the schools, the social worker in charge said she “contacted the schools.” Upon examination and reflection, however, it became apparent that “contacting the schools” consisted not only of sending notices, but of making repeated phone calls, making appointments that were convenient for the school personnel, attending parent/teacher meetings and school events, and sitting in the teachers’ room available for impromptu conversation. Once reflected upon and verbalized, these obvious points of tacit knowledge had to be formulated in a way that could be used by others to develop similar programs. Figure 1 illustrates the process of turning tacit knowledge into actionable knowledge via reflection, documentation and inquiry (Rosenstein, 2001).

- *Use external observations for critical reflection of assumptions and double-loop learning.* For example, in a projected evaluation of the Knowledge Management Project in Social Services in Israel, the aim of the evaluation is the thorough examination of the basic assumption that “learning, reflective social workers provide better service.” The evaluator must be able to break through the existing frames and repertoires (Schön & Rein, 1994; van der Meer, 1999) that are the barriers to learning. The organization for its part has to be ready for such consciousness-raising.

In order to provide the kind of evaluation needed to initiate and contribute to organizational learning, the evaluator must expand

**Figure 1**  
**From Tacit Knowledge to Actionable Knowledge**



his or her skills. We propose three major changes. The first two are technical and, in that sense, easier to achieve. The third one is substantive and therefore more difficult. We discuss them below.

#### THE ROLE OF THE EVALUATOR IN ORGANIZATIONAL LEARNING: REQUIRED CHANGES

As we stated above, the expansion of the role of the evaluator to include organizational learning facilitation seems almost self-evident. While the significant contribution of evaluation to the process of organizational learning is not in debate, the role of the evaluator has to be re-examined. We claim that the role of the evaluator has to change in three ways:

1. *Changes in contract and procedures.* Organizational learning is a time- and effort-consuming process. Under the burden of everyday activities the process of learning is often perceived as less important, and in many cases the participants try to avoid it (Biott & Cook, 2000; Katz, Sutherland, & Earl, 2002). In the contract between evaluator and evaluatee it has to be clearly stated that the organization is ready to create the procedures for learning: time allotment, personnel, meetings, and other required resources. Such an addition to the normal contract demands is problematic, as it is often difficult to convince the evaluatee to devote the time and effort required for a conventional evaluation. Thus the organization must take an active role in the evaluation — much more active than is usually required. In addition to the demands on time and effort, a change in attitude toward evaluation is mandatory for the combination of evaluation and organizational learning to work.
2. *Changes in evaluator skills.* The focus on organizational learning transforms the role of the evaluator to one of knowledgeable facilitator who returns responsibility for the operation, development, maintenance, and evaluation back to the evaluatee through the creation of a learning community. In the conventional role of an evaluator, the emphasis is on data gathering and analysis. But as a facilitator of organizational learning, the evaluator is responsible for the procedures of learning — providing tools and monitoring the learning that takes place. Such responsibility calls for group leadership skills and knowledge of group dynamics, learn-

ing procedures, coping with resistance, and so on. The evaluator uses reflection, in-depth phenomenological interviews, observations, and other methods of data collection and analysis in order to clarify data and make sense of the complex context and knowledge of an organization. In the process of learning, the evaluator has to create the group or the community of learners, to be responsible for and to facilitate the group processes. The evaluator has to fight for time and resources to allow for such a learning procedure (even if there is a contract). In addition, the evaluator needs to be an external expert who is able to bring knowledge to the organization. As in all other forms of evaluation, the basic skills of the evaluator still carry great weight in the effectiveness of the evaluation. The difference lies in the fact that in addition to reflecting and learning, the evaluator has to help the organization reflect and learn by providing new experiences, new interactions, new information, or at least new ways of looking at old information. The depth and extent of that joint reflection and learning will still determine the depth and extent of evaluation utilization (Owen & Lambert, 1995; Patton, 1997; Preskill & Torres, 1999a, 1999b, 2000). All these tasks are not part of conventional evaluation. Therefore, a different kind of training is needed.

3. *Changes in the purpose and thus the ownership of knowledge.* As mentioned earlier, many writers in the field of organizational learning claim that cognitive maps of members in the organizations have to be changed to enable changes in decision-making. We propose that the same change has to be made by the evaluator when he/she shifts the emphasis toward organizational learning. We propose that facilitation of organizational learning is not just a matter of doing more of the same. It is something essentially different. Organizational learning is about knowledge. We close our discussion by referring to the ownership and control of such knowledge. Evaluators conduct evaluation procedures and data-collecting procedures to help them form a deep understanding of the evaluatee so that they can perform the job of evaluation well. Once they understand the reality of the organizational situation, they are able to present their findings to the organization in a productive manner. The data gathered and the knowledge constructed during the evaluation are fed into the evaluation to serve its needs so that it can serve the evaluatee in return.

As an organizational learning facilitator the evaluator does the same, but based on two essentially different assumptions. First, the task is to be done by the evaluatee, guided by the evaluator. Second, the data gathering and analysis are done for the sake of the evaluatee and not for the sake of the evaluation per se. The understandings, the making sense, the research, and the conclusions are conducted by the organization for the purposes of learning, adjustment, improvement, dissemination, and empowerment. In orthodox evaluation, participatory or not, the evaluator controls the flow of knowledge, decides what sorts of knowledge will be presented to the organization, in what ways, and to what audiences. The new approach that combines evaluation and organizational learning shifts the control of knowledge to the organization. In the process of organizational learning, knowledge is the property of the organization and all its members. The learning content is the mutual responsibility of the organization and the evaluator. More importantly, the knowledge that plays a role in the process is organizational property and not the property of the evaluator. The focus of the evaluation has shifted. Rather than the evaluator collecting information and analyzing it in order to understand the evaluatee (the organization), the organization collects and analyzes data in order to better understand itself.

## CONCLUSION

This article has discussed the intricately entwined relationship between evaluation and organizational learning, and the issues that evolve from this relationship for the evaluator. The benefits of evaluation to the process of organizational learning are widely accepted and have been supported by research. We have examined the demands posed by the process of organizational learning and the resultant changes and skills in the role and knowledge of the evaluator. Our contribution to the discussion is to focus on the changing role of the evaluator in this process.

The change is not on the surface. We are talking about a substantive change. In fact, on the surface the evaluator seems to function in the traditional domain of data collection and analysis and the presentation and use of findings. In other words he/she comes from outside to assist the organization in a specific way through the use of data. However, within the context of organizational learning, he/she performs these tasks *with* the stakeholders instead of *for* the stakeholders, encouraging them to take on the leading role.

Such activity requires changes in two dimensions: one is technical and the second is in mindset. The technical dimension deals with the acquisition of skills not necessarily in the evaluator's repertoire, as we previously mentioned. The change in mindset deals with different role perceptions. Becoming a facilitator for organizational learning means that one must relinquish the traditional power or authority that is connected with evaluation. Such authority implies ownership of the knowledge and the responsibility for management of it. Convincing the evaluator to relinquish such authority is one of the main obstacles to changing the evaluator's role.

Therefore it is essential to ensure that these changes are possible before embarking on the road that leads to the combination of evaluation and organizational learning. Yes, it can be a productive and positive combination, but without the proper understanding of the substantive differences and the appropriate preparation, it will not work.

In the light of this new view of the changes in the role of the evaluator, further research would be most welcome. It would be interesting to examine evaluators' own perceptions of their role as facilitators of organizational learning on the one hand. On the other, it would be illuminating to examine how people within the organization perceive the role of the evaluator in that process. A number of case analyses offering insights into these matters would provide greater understanding and could be fed into areas of practice.

#### REFERENCES

- Abma, T.A. (1997). Playing with/in plurality: Revitalizing realities and relationships in Rotterdam. *Evaluation - The International Journal of Theory Research and Practice*, 3(1), 25-48.
- Argote, L. (1999). *Organizational learning: Creating, retaining and transferring knowledge*. Boston: Kluwer Academic.
- Argyris, C. (1992) Overcoming organizational defenses. *Journal for Quality and Participation*, 15(2), 26-28.
- Argyris, C., & Schön, D.A. (1978). *Organizational learning*. Reading, MA: Addison-Wesley.
- Argyris, C., & Schön, D.A. (1996). *Organizational learning II: Theory, method and practice*. Reading, MA: Addison-Wesley.

- Banerjee, S.B. (1998). Corporate environmentalism: Perspectives from organizational learning. *Management Learning*, 29(2), 147–164.
- Biott, C., & Cook, T. (2000). Local evaluation in a national early years excellence centres pilot programme. *Journal of Performance Management and Participatory Evaluation*, 6(4), 399–413.
- Caracelli, V., & Preskill, H. (2000). *The expanding scope of evaluation use* (New Directions for Evaluation, No. 88). San Francisco: Jossey-Bass.
- Compton, D., Glover-Kudon, R., Smith, I.E., & Avery, M.E. (2002). Ongoing capacity building in the American Cancer Society (ACS) 1995–2001. In D.W. Compton, M. Baizerman, & S. H. Stockdill (Eds.), *The art, craft and science of evaluation capacity building* (New Directions in Evaluation, No. 93, pp. 47–61). San Francisco: Jossey Bass.
- Conner, R.F., & Tanjasiri, S.P. (1999). Communities evaluating community-level interventions: The development of community-based indicators in the Colorado Healthy Communities Initiative. *Canadian Journal of Program Evaluation*, 14(Special), 115–136.
- Cousins, J.B. (2003). Utilization effects of participatory evaluation. In T. Kellaghan, D.L. Stufflebeam, & L.A. Wingate (Eds.), *International handbook of educational evaluation* (pp. 245–265). Boston: Kluwer.
- Cousins, J.B., Goh, S., Clark, S., & Lee, L., (2004). Integrating evaluative inquiry into the organizational culture: A review and synthesis of the knowledge. *Canadian Journal of Program Evaluation*, 19(2), 99–141.
- Cousins, J.B., & Whitmore, E. (1998). Framing participatory evaluation. In E. Whitmore (Ed.), *Understanding and practicing participatory evaluation* (New Directions for Evaluation, No. 80, pp. 5–23). San Francisco: Jossey-Bass.
- Crossan, M.M., Lane, H.W., & White, R.E. (1999). An organisational learning framework: From intuition to institution. *Academy of Management Review*, 24(3), 522–537.
- Cummings, T.G., & Worley, C.G. (1997). *Organizational development & change* (6th ed.). Cincinnati, OH: South-Western College.

- Dewey, J., & Bentley, A.F. (1949). *Knowing and the known*. Boston: Beacon.
- Drewett, A. (1997). Evaluation and consultation, learning the lessons of user involvement. *Evaluation - The International Journal of Theory Research and Practice*, 3(2), 189–204.
- Easrerby-Smith, M., Snell, R., & Gherardi, S. (1998). Organizational learning: Diverging communities of practice. *Management Learning*, 29(3), 259–272.
- Edmondson, A., & Moingeon, B. (1998). From organizational learning to the learning organization. *Management Learning*, 29(1), 5–20.
- Fetterman, D.M., Kaftarian, S.J., & Wandersman, A. (Eds.). (1996). *Empowerment evaluation, knowledge and tools for self-assessment and accountability*. London: Sage.
- Foil, C. (1994). Consensus, diversity and learning in organizations. *Organization Science*, 5, 403–420.
- Forrester, J.W. (1987). Lessons from system dynamics modelling. *System Dynamics Review*, 3(2), 136–149.
- Forrester, J.W. (1990). *System dynamics as a foundation for pre-college education* (D-4133). Cambridge, MA: System Dynamics Group, Massachusetts Institute of Technology.
- Forss, K., Cracknell, B., & Samset, K. (1994). Can evaluation help an organization to learn? *Evaluation Review*, 18(5), 574–591.
- Freire, A.M.A., & Macedo, D. (Eds.). (1998). *The Paulo Freire reader*. New York: Continuum.
- Gilliam, A., Barrington, T., Davis, D., Lacson, R., Uhl, G., & Phoenix, U. (2003). Building evaluation capacity for HIV prevention programs. *Evaluation and Program Planning*, 26, 133–142.
- Gorodeski, M. (2003). The regenerating school: A model for a learning and knowledge creating school. *The experimental comprehensive G' school, project's book*. Jerusalem: Ministry of Education, Elementary Schools and Initiatives section. (in Hebrew)
- Guba, E.G., & Lincoln, Y.S. (1989). *Fourth generation evaluation*. London: Sage.

- Hedberg, B. (1981). How organizations learn and unlearn. In P.C. Nystrom & W.H. Starbuck (Eds.), *Handbook of organizational design* (pp. 8–27). New York: Oxford University Press.
- House, E., & Howe, K.R. (2000). Deliberative democratic evaluation. In K.E. Ryan & L. DeStefano (Eds.), *Evaluation as a democratic process: Promoting inclusion, dialogue, and deliberation* (New Directions for Evaluation, No. 85, pp. 3–12). San Francisco: Jossey-Bass.
- Katz, S., Sutherland, S., & Earl, L. (2002). Developing an evaluation habit of mind. *Canadian Journal of Program Evaluation*, 17(2), 103–119.
- King, J.A. (2002). Building the evaluation capacity of a school district. In D.W. Compton, M. Baizerman, & S.H. Stockdill (Eds.), *The art, craft and science of evaluation capacity building* (New Directions in Evaluation, No. 93, pp. 63–80). San Francisco: Jossey-Bass.
- Korland, H. (2000). *The elementary school as a learning organization*. Master of Art thesis, Haifa University, Israel. (in Hebrew)
- Kuhn, H. (1962). *The structure of scientific revolutions*. Chicago: University of Chicago Press.
- Lewin, K. (1951). *Field theory in social science*. New York: Harper & Brothers.
- Lippitt, R., Watson, J., & Westley, B. (1958). *The dynamics of planned change*. New York: Harcourt, Brace & World.
- Mertens, D.M. (1994). Training evaluators: Unique skills and knowledge. In J.W. Altschuld & M. Engle (Eds.), *The preparation of professional evaluators: Issues, perspectives, and programs* (New Directions for Program Evaluation, No. 62, pp. 17–27). San Francisco: Jossey-Bass.
- Mezirow, J. (1991). *Transformative dimensions of adult learning* (1st ed.). San Francisco: Jossey-Bass.
- Mosse, D. (1994). Authority, gender and knowledge: Theoretical reflection on the practice of participatory rural appraisal. *Development and Change*, 25, 497–526.
- Nevo, D. (1989). *Useful evaluation: Evaluating educational & social projects*. Tel Aviv: Masada. (in Hebrew)

- Nonaka, I., & Kono, N. (1998). The concept of "Ba": Building a foundation for knowledge creation. *California Management Review*, 40(3), 40–54.
- Owen, J.M., & Lambert, F.C. (1995). Roles for evaluation in learning organizations. *Evaluation - The International Journal of Theory Research and Practice*, 1(2), 237–250.
- Owen, J.M., & Rogers, P.J. (1999). *Program evaluation forms and approaches*. London: Sage.
- Patton, M.Q. (1981). *Creative evaluation*. Beverly Hills: Sage.
- Patton, M.Q. (1997). *Utilization-focused evaluation* (3rd ed.). Thousand Oaks, CA: Sage.
- Pauzke, G. (1989). *Die Evolution der organisatorischen: Bausteine zu einer theorie des Organisatorischen Lernens* [The evolution of the organization: Components of a theory of organizational learning]. Berlin: Verlag Barbara Kirsch.
- Pawson, R. (1996). Three steps to constructivist heaven. *Evaluation*, 2(2), 213–219.
- Pedler, M., Boydell, T., & Burgoyne, J. (1989). Towards the learning company. *Management Education and Development*, 20(1), 1–8.
- Popper, M., & Lipshitz, R. (1998). Organizational learning mechanisms: A structural and cultural approach to organizational learning. *Journal of Applied Behavioral Science*, 34, 161–179.
- Preskill, H. (1994). Evaluation's role in enhancing organizational learning. *Evaluation and Program Planning*, 17(3), 291–297.
- Preskill, H., & Torres, R.T. (1999a). Building capacity for organizational learning through evaluative inquiry. *Evaluation - The International Journal of Theory Research and Practice*, 5(1), 42–60.
- Preskill, H., & Torres, R.T. (1999b). *Evaluative inquiry for learning in organizations*. Thousand Oaks, CA: Sage.
- Preskill, H., & Torres, R.T. (2000). The learning dimension of evaluation use. In V.J. Caracelli & H. Preskill (Eds.), *The expanding scope of evaluation use* (pp. 25–39). San Francisco: Jossey-Bass.

- Probst, G.J.B., & Buchel, B.S.T. (1997). *Organizational learning: The competitive advantage of the future*. London: Prentice Hall.
- Richter, I. (1998). Individual and organizational learning at the executive level: Towards a research agenda. *Management Learning*, 29(3), 299–316.
- Rippey, R.M. (1973). *Studies in transactional evaluation* (Ed. Robert M. Rippey). Berkeley, CA: McCutchan.
- Rosenstein, B. (2000). Video use for program evaluation: A conceptual perspective. *Studies in Educational Evaluation*, 26, 373–394.
- Rosenstein, B. (2001). *Evaluation report of the project for knowledge management*. Israel: Department of Labor and Social Services.
- Rosenstein, B. (2002). The sorcerer's apprentice and the reflective practitioner. *Reflective Practice*, 3(3), 255–261.
- Schön, A., & Rein, M. (1994). *Frame reflections*. New York: Basic Books.
- Scriven, M. (1967). The methodology of evaluation. In R.W. Tyler, R.M. Gagné, & M. Scriven (Eds.), *Perspectives of curriculum evaluation* (pp. 39–83). Chicago: Rand McNally.
- Senge, P.M. (1990). *The fifth discipline*. New York: Doubleday.
- Senge, P.M. (1998). *The learning organization*. Tel-Aviv: Matar. (in Hebrew)
- Snell, R., & Chack, A.M-K. (1998). The learning organization: Learning and empowerment for whom? *Management Learning*, 29(3), 337–364.
- Stufflebeam, D.L., Foley, W.J., Gephard, W.J., Guba, E.G., Hammond, R.L., Merriman, H.O., & Provus, M.M. (1974). *Educational evaluation and decision making* (4th ed.). Itaska, IL: F.E. Peacock.
- van der Meer, F. (1999). Evaluation and the social construction of impacts. *Evaluation - The International Journal of Theory Research and Practice*, 5(4), 387–406.
- Walton, J. (1999). *Strategic human resource development*. Edinburgh Gate, UK: Pearson Education.

Watzlawick, P., Weakland, J.H., & Fisch, R. (1988). *Change, principles of problem formation and problem resolution*. New York: W.W. Norton.

**Miry Levin-Rozalis**, Ph.D., sociologist and psychologist, is a faculty member in the Department of Education at the Ben Gurion University. For the last 20 years she has been an evaluator of projects and programs in the social community and an organizational consultant within the university and as a freelancer. She is the former president of IAPE, Israeli Association for Program Evaluation.

**Barbara Rosenstein**, Ph.D., has been active in the field of program evaluation since 1986 when she began conducting internal evaluations for Bernard van Leer Foundation Projects in Israel. As part of her role as project evaluator, she incorporated the use of visual tools for collecting and analyzing data and giving feedback. She was one of the founding members of the Israeli Association for Program Evaluation of which she is currently chairperson. She serves on the Board of the International Organization for Cooperation in Evaluation (IOCE).

The Changing Role of Evaluators Who Work with Foundations. Center for Evaluation Innovation. Follow. With the ante raised on the role of evaluation as one of informing strategy and strategic learning, evaluators had to gain yet even more skills in order to be effective. To prevent our information and findings from getting dusty on that proverbial shelf, we had to become strategic communicators. Strategic communications is the managed process by which information is produced and conveyed to achieve specific objectives. Evaluators had to become more deliberate, savvy, and less passive in our communications. Doing organizational development work and handling internal politics. Courting other funders. CHAPTER 4 Evaluation as part of programme/project management. Overview of the UNODC evaluation process. Phase 1: planning. Phase 2: preparation. 6 USING EVALUATION RESULTS Focus on utilization Using results in the programme cycle How results are shared Strategies for translating learning into action Summary Resources. 106 107 109 111 112 114 114. 7 PRACTICAL GUIDE About this guide Ethical guidelines for evaluation Key issues to consider The theory of change and logical framework Designing the evaluation process Common challenges Additional resources. 116 117 118 119 125 129 143 148. vi. Framework for Strengthening Evaluation and Organizational Learning. Handbook as an instrument to guide and harmonize evaluation work being conducted across the organization and to support mainstreaming of high quality evaluation work. To build on this, and to further support the ongoing WHO reform process, strengthening evaluation and organizational learning has been identified as one critical component to take forward. As a first step on 1 August 2014, the evaluation function was moved from within the Office of Internal Oversight Services to become a separate unit to support independent evalu...