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Alison Carter, Ph.D., Helen Wolfe and Maire Kerrin, Ph.D.

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Employers and Coaching Evaluation

Alison Carter, Ph.D., Helen Wolfe and Maire Kerrin, Ph.D.

Many UK corporate purchasers perceive coaching as a widely accepted method for the development of executives' talents in support of corporate objectives. There is, however, perceived to be a paucity of evidence about whether coaching is an effective tool for improving individual and organisational performance despite its widespread purchase and use in practice. As far as employers are concerned, advice and guidance are not readily available to them on how to evaluate the coaching which they are providing within their organisations. Using three case study illustrations of how leading UK organisations are evaluating their coaching provision, this article explores issues in evaluating coaching in an organisational context. It also identifies what factors seem to help and hinder good evaluation practice in a workplace context. The article draws on findings arising from a 2003-04 study of coaching evaluation practices funded by the UK-based IES Employee and Management Development Research Network of 57 large employers. Commentary is drawn from the authors' own experiences: all as evaluators and one as an executive coach.

Existing Research on Whether Coaching is an Effective Tool

There is limited evidence on the impact of coaching as a tool, and some of the published research studies in this area have serious limitations in their design and analysis of the data collected. However, there are some insightful papers and in the area of executive coaching a number of these studies have been identified that focus on the efficacy of executive coaching. In summary these studies provide some limited evidence that executive coaching is effective for increasing performance¹, is viewed favourably by executives² and has the potential to facilitate developmental change³. However, these and other studies⁴ all vary as to what they were assessing in terms of effectiveness, and all use different approaches and methods for evaluation. Some had 'quasi-experimental' approaches to gathering information on coaching; others were more informal in their approach. As such, they provide an indication as to the potential for coaching to be effective in certain areas, but apart from one study they offer limited guidance on how to evaluate coaching within organisations.

Why Do We Need More Research on Coaching Evaluation?

Timing of Evaluation and Availability of Information

Two practical barriers to evaluation were highlighted by UK employers that they claimed made coaching evaluation feel different than their traditional training evaluation. First is the timing of the evaluation and how it affects the information gathered on the effectiveness of the coaching. Evaluation directly after the coaching experience may not be appropriate as the benefits may

only accrue later when the coach or person coached reflects fully on what the relationship has brought them. Although this is true also of other forms of training, whereby you may not get to use your new skills until a later date, it is more likely that you will be able to anticipate or recognise where training will help. With coaching, the outcomes of what is learnt or discussed may not be immediately obvious to either the coach or those coached, unless again they are linked into a wider programme (e.g., leadership development, culture change). Also, as the defined success criteria may not be agreed upon until the coaching process has begun, it is difficult to measure pre- and post-coaching intervention to assess the impact. Second, information with which to evaluate may not be readily accessible in a coaching situation (e.g., due to the confidential nature of the coaching context, etc.).

Evaluation Models

Any discussion of evaluation within a learning and development context does not go far before models such as Kirkpatrick's⁵ are introduced. In a search of the published academic research literature, one significant reported study of coaching evaluation within an employing organisation that had used any systematic approach based on a model of evaluation was given by McGovern and colleagues⁶. They applied Kirkpatrick's model systematically to evaluate coaching at all four levels (reaction, learning, behavioural change and organisational outcomes). They also included a level 5 measure of return on investment (ROI) based on the work of Jack Phillips⁷. In addition, they developed a methodology for assessing the factors contributing to coaching effectiveness and ineffectiveness and found that the key factor to the effectiveness was the quality of the relationship between the coach and the executive.

We have encountered some employers who struggle to systematically evaluate traditional forms of training and development, let alone adapt these arrangements for evaluation coaching programmes. So why are we worrying about coaching evaluation? According to previous IES research on training evaluation⁸, most evaluation of management development takes place at the 'reaction level' of Kirkpatrick's model of evaluation without much effort placed at the learning or behavioural change levels. If this is the norm for evaluation for other forms of training and development, should we settle for this level of approach to coaching evaluation as well? We say no. In practice, and from discussing the issues with IES Research Network member companies, there seems to be a need to demonstrate the contribution of coaching in more detail, at the levels of learning gained, behaviours changed, or outcomes achieved either individually or organisationally.

According to a survey of large UK based organisations in 2002⁹, 92 per cent of companies contract external suppliers called 'executive coaches', with 65 per cent of public sector organisations following suit. Among respondents in both the public and private sectors predictions were that would continue to increase over the next five years. Despite this widespread adoption of coaching in the UK, coaching is still regarded as a rather new, unproven and less established form of development in comparison to classroom based courses. Because of its 'newness' coaching is more likely to be scrutinised in terms of its impact on development than traditional forms of development that are well established in organisations. More traditional forms of development may have limited evidence of impact on individual and organisational behaviour change, but they are more accepted and less likely to be challenged in terms of their value. An attempt at addressing key evaluation issues in coaching is therefore becoming important in establishing its credibility as a successful intervention. If we take existing models such as Kirkpatrick and try to apply them to coaching, what are the key issues to emerge?

Defining Outcomes

Evaluating coaching presents a number of problems for traditional training evaluation models, including that of Kirkpatrick. Coaching is often conducted less formally than training interventions, based on one-to-one sessions which may not be related to any specific programme. A particular issue here is that coaching may start without formal aims, objectives or outcomes written by the organisation that would almost certainly be central to any formal training course they planned to commission. It may be that the coaches hired are also unable or unwilling to have the up-front conversation about what organisational results are intended from

the coaching intervention. This lack of clear aims and objectives at the start of the process causes real difficulties for evaluation of the process. Defining outcome measures of an intervention in development and training is the cornerstone to most evaluation models as it provides a basis for conducting your evaluation. The lack of such common practice perhaps is the single biggest difference between the evaluation of coaching and that of other approaches.

The credibility of coaching depends on being able to help achieve set outcomes for the coaching process. Yet as coaches know, the nature of coaching means that it operates at a very individual level where different people will get different things out of coaching. Where traditional approaches to training aim to have a level playing field by the end of the session, where everyone knows the same thing to the same level, coaching is individually focused. This has a major impact on evaluation in that *no set standard measurement criteria for coaching outcomes can be set to cover all coaching interventions across an organisation*. However, this does not mean that no evaluation at the organisation level can be taken as criteria can be set within a broader framework.

Corporate purchasers of coaching services told us that that they find coaching sessions which are not linked to any wider development programmes or feedback exercises the most difficult to evaluate. This is because they do not appear to link to any particular individual outcome or organisational contribution. Where coaching is purchased as one element of a more traditional intervention (e.g., a leadership development programme or cultural change programmes) that are being formally evaluated, outcomes will have been articulated for the programme and there may be some way of linking evaluation to these outcomes. While the effect on the individual through self-report may be positive, the strategic value for organisations as well as individuals needs to be addressed.

Published accounts of the executive coaching process,¹⁰ and best practice guidance for coaches, suggest a number of common processes involved in coaching, including setting goals or reaching a shared understanding of what will be discussed. Some of the commonly agreed features of executive coaching or business performance coaching are that it is goal specific, action- and performance-oriented, and objective. These elements all lend themselves to a measurement framework and hence evaluation at the level of each individual being coached. However, these goals and objectives often emerge as part of the process, rather than existing at the beginning as part of the course. Once goals are established within the coaching process, these then lead to defined success criteria that

could be linked to evaluation measures. The key to how this might operate in practice would be to decide: What are these elements or success criteria and outcomes? Which of these elements are measurable and when? By whom? And what is the overall value to both the individual and the organisation?

So if it is reasonable to assume that professional coaches are already encouraging their coachees to measure success at the individual level as a matter of course, employing organisations need to be clear about their interests. Is it that they want to be inside the 'loop' and be party to the confidential information individuals are generating with their coaches about their individual level successes? Coaches and individuals might justifiably resist this. Or should employers rely on the good performance of the coaches they hire to ensure individual success is articulated and instead spend their evaluation time and effort on identifying organisation level success?

In our discussions with UK organisations, we found a lack of clarity about the nature and implication of this choice. It seems to us that these two options are very different. Training and development functions are increasingly organising large scale coaching-based programmes linked to leadership development or culture change initiatives, sometimes involving multiple coaching providers. In these circumstances we believe the organisational effort would be better spent in a proper definition of organisational success criteria, organisational outcomes and organisation level measures. It is in this area that employers feel evaluation research is failing them. There may be plenty of advice for coaches on how to evaluate at the individual level, but where are the examples for employers of evaluation practice at the organisation level? And where is the advice to employers on models and how to apply them? In short, they perceive there to be missing pieces to the evaluation research jigsaw.

Evaluating the 'Bigger Picture'

Research on evaluation of mentoring suggests that determining the contribution of mentoring to achieving the objectives of broader organisation-wide initiatives is also a problem¹¹. Determining and distinguishing the effects of coaching are perceived by corporate purchasers as difficult enough; then to link these effects to the achievement of specific objectives in a broader context is even more difficult. Many other factors influence progress towards objectives. (See the O'Neill article in 2005 Issue 1 of this journal for how to tease out other causal factors.) Although no direct causal link can be claimed, it is perfectly possible to *clarify the expected logical links between coaching and the achievement of objectives within the broader initiatives*. For example, relating outcomes to the broader initiative

or as McGovern and colleagues¹² have done by demonstrating the chain of impact. However, the question still remains, how do you evaluate the coaching element, in particular, from the organisational perspective rather than from that of the individual or coaches? This leads us to consider from whose perspective the evaluation is taking place.

Different Perspectives on Evaluating Outcomes

The objectives and aims of the evaluation, particularly in terms of which outcomes are measured, will also differ according to the various stakeholders involved in the process. For example, the organisation may want any evaluation to demonstrate the impact of the coaches on whatever initiative they have been brought in to influence (e.g., leadership, cultural change). Individuals, on the other hand, may have a different set of criteria with which they evaluate the success of the coaching and may be related to those agreed upon in the coaching session, rather than the broader organisational aims. While these criteria may often be complementary and occasionally the same they may not always be the same, and so any evaluation strategy needs to be explicit as to whose criteria and outcomes it is measuring. Where success criteria are different, both perspectives are to be considered. The same principle of multiple stakeholder perspectives may be given for an external coaching company who may want to demonstrate the influence of their coaches on a client organisation initiative, in addition to achieving individual outcomes and success criteria. They would need to employ evaluation tools that evaluate from both perspectives.

Qualities of the Coach and Coaching Relationship

A further significant issue is the contribution of the quality and abilities of the coach to the outcomes. Researchers and practitioners alike agree that the moderating effect of the quality and skills of the coach is perceived to be more important in coaching than the role of the trainer in a traditional training event. This is due to the suggestion that the effectiveness of any coaching intervention is primarily determined by the *ability of the coach* – what was it about them and the *quality of the coaching relationship* that contributed to the changes and outcomes observed? Therefore, employers seeking a comprehensive evaluation strategy would need to consider mechanisms which evaluate not only the changes in outcome variables, or 'success criteria' as a result of coaching, but also assess the nature of the relationship that helped to bring about those changes. Such a comprehensive approach would allow the organisation to identify underlying factors or mechanisms that influenced the results. Not all employers may choose to take on this additional perspectives, although we would recommend it since any common or corporate 'blockages' getting in the way

to achieving desired results, once identified, can be removed by the organisation.

Case Studies of Evaluation Practice

Despite the problems and difficulties previously outlined, our IES Research Network study of coaching evaluation practices by employers¹³ did come across many organisational examples. Although very few of these examples were overtly based on an evidence-based model of evaluation, we nevertheless consider them to be a useful contribution. They were planned activities designed to assist the organisation in making judgements about how the coaching was going and to make decisions about future coaching provision in the light of these judgements. If evaluation is essentially about putting a value on things – and we believe it is – then these companies were engaging in coaching evaluation. Since employers seem to believe the academic research literature is not providing enough new insights in this area, the contribution of reflective practitioners in organisations should perhaps be promoted.

In this section we share with you three different examples of applied evaluation research, and our thoughts on their potential for wider application. We encountered three basic categories of evaluation in the practitioner literature and in practice underpinning what organisations were doing: they were seeking to **prove** something, **improve** something or **learn** something. Our three chosen case study examples, one from each category, are not presented as exemplars of good practice, but rather as examples of ‘home-grown’ practical approaches used by organisations in the absence (as they would describe it) of clear advice from researchers and coaches about how they should be doing it.

Case Study 1: Financial Services Provider¹⁴

In June 2003 the Head of Training and Recruitment at a major UK financial services provider was considering supplementing existing training programmes with one-to-one follow-up coaching sessions after training had been delivered. As well as helping to transfer newly learnt skills into the workplace, it was also hoped the move would support the creation of a coaching culture throughout the organisation. Before proceeding the company decided the best approach was to quantify the likely effectiveness by running what they called a ‘test pilot’. We would describe it as a research project. The performance of the sales force was selected as the best output measure for a small-scale test pilot. The selling skills training course was targeted as the best input activity to research. The sales performance of 24 financial planning managers was followed over a six-month period. For each planner, sales figures from the three months prior to the training were compared to the

three months following the training course. Twelve managers attended the course, six of these were assigned an external coach for three months following the course; the other six had no external coaching but did receive the usual follow-up support from their line manager. The remaining 12 managers acted as a ‘control group’ as they did not attend the training course and therefore had no follow-up support from a coach or their managers.

The dramatic results led the organisation to value their training programme, as well as emphasise how important some kind of effective follow-up regime is to embed learning. For the control group, sales grew by four per cent. From this the company concluded that had it done no training or coaching at all other internal or external factors such as market conditions meant business would have increased by four per cent anyway. For the training-only group, sales increased by eight per cent, double the increase of the control group. For the group who received training plus coaching sales increased by 27 per cent.

Case Study 2: Local Councils in England¹⁵

Achieving improvements in public services is a cornerstone of current central government policy in England. Service improvement initiatives are underpinned by a number of infrastructure projects including building HR capacity and leadership capability in local councils. A pilot HR coaching programme was designed by one of the authors to determine whether coaching might contribute to improvements in strategic thinking, and contribution to corporate leadership, among senior HR professionals. Twenty-four HR participants were recruited from 24 councils across the Northwest and eastern regions of England. The pilot programme comprised a series of one-to-one coaching sessions supplemented by two seminars during the period February – September 2004. A comprehensive approach to evaluation was taken. Data collection methods used included: mid-point in-depth telephone interviews with all participants; end of programme impact questionnaires for participants, their coaches and their organisation sponsors (typically the CEO); separate focus groups for participants and coaches/programme organisers; and telephone interviews with coaches. These generated a substantial volume of information regarding the experiences and impact of the programme.

Of particular interest was the opportunity to explore differing perceptions of behavioural change. In order to assess any potential differences between the three groups – participants, organisation sponsors and coaches – a matched triad methodology was adopted. This involved isolating from the impact questionnaire data only the

ratings data that we had from all three groups. There were ten participants that fell into this category whose responses we examined in parallel with those of their individual sponsors and also their coach. Ten participants represent 42 per cent of the total participant population and 50 per cent of the participant sample returning impact questionnaires. The results have to be interpreted with caution due to the small sample size, but they are interesting nonetheless.

The end-of-pilot impact questionnaires had sought information relating the perceived and actual impact of the coaching along three key dimensions of behavioural changes:

- Personal effectiveness
- HR function leadership
- Strategic thinking and corporate leadership.

Within each of these areas a series of statements was presented to all three groups who were asked to rate their level of agreement along a standard five-point Likert scale. For each thematic grouping of statements, factor analysis was then performed to ascertain the extent to which the items used were in fact assessing the same concept. Distinct differences in the reliability of conceptual clusters can be seen between the three groups, highlighting that different groups of individuals are likely to hold divergent views of the same issue.

Along all impact dimensions, and for all items, positive mean responses were found for all of the evaluation groups. This indicates the required changes in behaviour were thought to have taken place. However, participants consistently rated the extent of change much higher than their sponsors did – on 15 out of 19 assessment items. Sponsors did rate the impact of the coaching positively along all of the items, but to a lesser degree than their participants.

The ten participants who were selected for this further analysis reported higher levels of engagement in the coaching process than the other participants whose sponsors did not complete the evaluation. The mean scores were at a level higher than for the entire participant population group. Perhaps this suggests that higher levels of organisational support, and proactive sponsor engagement, lead to higher levels of perceived impact from coaching. The implication for coaching is that we can be confident that engagement on all sides, not merely from participant and coach, is vital to the overall success of the programme. Within the HR coaching pilot programme, there were participants who reported they were unable to find or name a sponsor who was supporting their application and development in this process. Where this was the

case, participants also tended to comment (in the interviews and focus groups) that they felt more isolated in their development process, and subsequently may also have supplied lower levels of agreement with the impact assessment statements. Coaching may be highly individualised, and focused on personal development, yet these findings would support the view that for the greatest levels of behavioural change, support within the organisation is vital.

Case Study 3: Public Healthcare Providers in Wales¹⁶

Following changes to the regional political landscape in Wales following the birth of the Welsh Assembly in April 2003, the Centre for Health Leadership in Wales identified that the time was right to broker a development programme for CEOs and Directors across the public healthcare sector. The programme aimed to kick-start the creation of a more innovative organisation culture that valued new ideas, new thinking and managed risk-taking. Twelve coaches with a good knowledge of the sector, selected from five different external coaching companies, provided four one-to-one coaching sessions. Thirty-two CEOs and Directors participated as 'coachees.'

An independent institute was asked to conduct evaluation on behalf of all the programme sponsors and partners. The evaluation approach focussed on two questions:

- Has the coaching intervention taken place in the way intended?
- What can the organisations learn from the intervention?

A variety of evaluation methods were used, many of which were based on 'self-report' by coachees. First, all coachees were asked to provide some 'baseline data' at the start. This included information about the biggest challenges they faced in their role, biggest workplace issues, and which networks they were already involved in.

After each coaching session every coachee was asked to complete a score sheet to generate data useful for quality assurance purposes. Aspects scored included timing, quality of coach/coachee relationship and content. Coachees were also asked to identify the most helpful element in each session. After their final session, all coachees were asked to complete a questionnaire on more general issues such as motivation to joining programme; criteria they used in selecting which coach to work with; models/inputs particularly helpful; and what they have done differently as a result. Six of the 32 coachees were also interviewed face-to-face to allow some of the issues to be explored in more detail.

The perceptions of coaches were also collected. They were asked at the outset what issues they imagined might be key. The idea was to go back to the coaches again after the final session to compare these with the actual issues arising. Finally coach/coachee pairs were asked to write a 'learning vignette' covering what they were working on and how successful the coaching relationship had proved.

The findings revealed that the opportunity offered by the coaching had definitely been perceived and utilised as a management learning tool, rather than a personal development one. Coaching as a learning method was also viewed positively. Coachees valued the individual care and attention, and the acquisition of easy-to-apply models. The programme was also thought particularly timely in terms of inter-professional learning and had a positive effect on the personal morale and motivation of coachees.

The evaluation also raised some questions. The implications of using 'known' coaches - who were formerly senior employees within the sector - might have sent mixed messages to coachees if the programme was about retention. Coachee comments from the interviews suggest that using 'role models' who have left an organisation can be seen as something of a paradox.

Factors Helping or Hindering Evaluation Practice

During our discussions with employers we formed the view that coaching evaluation is an activity that almost all corporate purchasers agree is important but one which is often forgotten in the perpetual rush to get things done. Where it was taking place it rarely felt like the neutral and objective exercise that practitioners feel researchers describe and promote.

Case Study 1 was a small-scale example of intent to prove whether an increase in sales, a key organisational performance measure, occurred when coaching was introduced to support sales staff after their attendance on formal training courses. It is an interesting example because the organisation did not attempt to evaluate the likely impact for any other staff group, although coaching was being considered for many groups, nor in any other context than post-course support. The approach was for the organisation to focus its energy where they believed it was easiest to measure possible organisational impact. The idea was then to use these findings as 'reasonable evidence', though not the same as claiming 'proof', that there might be benefit for other groups or contexts. This avoided unnecessary additional expense and the complexity of measuring elsewhere where it might be less straightforward to identify an appropriate organisational measure of

impact. It is also interesting because the evaluation was designed by the organisation in partnership with the externally sourced coaches.

The in-house research project in case study 1 stopped short of a cost-benefit analysis or return on investment formula. When we enquired why, we were told there was no need because everyone could clearly see that the increase in sales significantly exceeded the cost of the training and coaching.

As researchers we are well aware that problems of 'causality' can be viewed as a big barrier to evaluation, especially for those employers that might be seeking to 'prove' something. There is no logical causation between improved business results and the fact that there has been coaching¹⁷ and such links are interpretative. Many variables affect business results including line management actions and competition in the market. Just because sales went up by 27 per cent in Case study 1 does not mean it was because of the coaching. Indeed one could argue that it may have gone up by more had there been no coaching.

It is interesting to find that the employer in case study 1 did not worry as much about causality as researchers tend to. The search for 'proof' to the Head of Training and Recruitment and her Board of Directors is a test of 'reasonableness' of the chain of impact being claimed. A scientific level of proof was not required. The use of a control group, comparing financial planning managers who received coaching with those who had not, was certainly a good idea in understanding the issues of causation and we would commend the organisation for this step. Interpretation was still needed though. For instance, one could argue that the group who were not offered coaching or training and the group not offered add-on coaching may have felt less favourably treated and might have had lower levels of motivation than the coached group.

This, one could argue, may explain the poorer performance of some groups. So whilst employers in the UK seem to agree that claiming business results is not proof in a strictly scientific sense, companies can remove the weight of the 'causality' barrier by adopting the pragmatic attitude of the employer in case study 1. The key question for applied evaluation research is thus redefined as 'do we believe the coaching helped achieve the business outcome?'

Case Study 2 is an example of the most common intent we encountered: to improve a flagship development coaching programme utilising other learning methods but predominantly one-to-one coaching. This confirms the findings of another study that found that feedback

from participants was the most common approach to evaluation by employers.¹⁸¹⁸

Case study 2 involved an in-depth evaluation by two of the authors using multiple data collection methods to identify behavioural changes that occurred in individual leaders involved in a pilot coaching programme. The idea was to use this information to assess whether the desired behavioural changes were being realised. It was also expected that any necessary incremental improvements to the programme would be identified, and these might increase the extent of behavioural change for individual leaders embarking on future cohorts of the programme.

Instead of evaluating direct business outcomes, the coaching in case study 2 was measured through subjective judgements on whether participants had improved their effectiveness. This is what we as researchers would call 'perceptual evaluation.' It is, of course, perfectly possible for in-house practitioners to carry out this kind of measurement in a standardised way and you do not have to hire external researchers. Structured questionnaires can be administered to participants before and after the coaching to compare their pre-and post-coaching perception of their own effectiveness. 360-degree feedback questionnaires can also bring into the evaluation process the perceptions of their line managers, customers, suppliers, peers and own staff.

UK employers we contacted had mixed views about perceptual coaching evaluation. On the one hand they found it much easier to conceptualise than measuring business outcomes because there were fewer methodological barriers or hindrances to overcome. One could still argue about causality, but if all parties agreed that the required behaviours were being displayed, as in case study 2, employers told us that evidence that the desired outcome had been achieved made it irrelevant as to what extent the coaching was responsible. But whilst perceptual evaluation was easier to conceptualise, on the other hand employers perceived it to be much harder to implement. Insistence from participants and coaches that such data should be treated as confidential hindered attempts to get a good response rate, and casts doubts on the generalisability of the results.

In Case Study 3 we would categorise the primary intent as being to learn about the potential of coaching as a tool for organisational learning and culture change. We would describe this example as being primarily about collecting reactions to the coaching. The organisation in case study 3 hired an external evaluator to explore the issues arising for individual leaders from

participating in a coaching programme. However, an in-house team could just as easily collect and explore reactions for itself using questionnaires or short telephone interviews or focus group interviews. Response rates from 'reactionnaires', as questionnaires to assess participants' reactions are sometimes known, can be improved considerably by asking coaches or line managers to distribute and collect the questionnaires. Sometimes forms are even completed as part of the final coaching session in the presence of the coach. However, our experience suggests the data may not then be as reliable as coachees may feel protective of their coach or under pressure to give positive responses.

Concluding Messages for Coaches and Corporate Purchasers

Corporate Purchasers

In this article we have explored issues in evaluating coaching in an organisational setting. We have argued that there is a missing piece of the jigsaw as far as employers are concerned in that not enough advice and guidance are available to them. We perceive that the key issue for coaching evaluation remains the same at both organisational and individual level, i.e., that the crux of any evaluation is defining the criteria for measurement in terms of success or outcomes. Towards the beginning of an engagement, there may be difficulties in a corporate purchaser getting too involved in this at the individual level because of the nature of coaching interventions and that providing much greater encouragement and support for coaches and coachees to do a better job on evaluation may be a more pragmatic way forward at the individual level. However, we believe that there are some clear improvements that corporate purchasers can make to their coaching evaluation practice at the organisational level which are likely to prove more effective than the current widespread use of routine 'reactionnaires'. We suggest that corporate purchasers giving consideration to five aspects will help.

Put aside your usual training evaluation model.

Firstly, corporate purchasers from HR or training functions need to understand that the traditional models of training evaluation they may use elsewhere may not apply very well with coaching interventions. This is because much of these traditional training approaches are based on the premise that objectives are set prior to training, usually via a training needs analysis. Traditional training evaluation is then linked to measuring whether these objectives have been met. In coaching, training needs analysis is often carried out within the coaching process from which aims and objectives emerge. Therefore it is more appropriate for individual level evaluation of behaviour change and impact of coaches to be assessed after this point. Thus

corporate purchasers may do better (for the purposes of evaluation) to conceptualise coaching interventions as less like training programmes and more like clinical and counselling consultations where, following a period of diagnosis and problem generation, plans for action are defined with appropriate measurement of success and rules of exit for the counsellor.

Talk to your coaches. Having urged caution in applying traditional training evaluation models, we still believe there are lessons to be learned at this individual level by organisations. Specifically, we suggest that corporate purchasers enter into an early dialogue with prospective coaches to make clear their expectation that once individual level objectives emerge, some form of agreed evaluation process is put in place. You can also clarify any data collection you expect the coaches you hire to carry out for you, when, in what format and by whom it will be seen. This is also the time to agree in advance how any confidentiality issues will be handled by the parties. Such conversations must also be held with the coachee so that there is a shared understanding of what remains between coach and coachee, and what may be discussed (and at what level of detail) with a manager or HR.

Develop standardised evaluation tools and guidance about methodology. Whenever you use tools, there will be an accompanying methodology for its implementation. This will require co-operation and co-ordination by the organisation. Contracting conversations are where these issues can most effectively be broached, discussed, and a course of action agreed on.

We suggest that organisations be far more proactive in offering guidance before coaching sessions commence to help both coaches and organisations in selecting appropriate evaluation tools to match objectives that are set. These tools need not be cumbersome or laborious. Making tools available, together with guidance on careful selection of methods at an early stage will provide useful data for the individual, coach and organisation further down the track. Certainly it will be a significant improvement on the ad hoc approaches to evaluation that many organisations currently engage in. Through this combination of early dialogue together with planning ahead by setting out methods and tools corporate purchasers feel are appropriate to use in evaluation in their setting, organisations should be able to identify much better whether they are achieving good practice and consistency across their coaching provision.

Broaden your view of 'success'. Take a leaf out of the case study examples in this article by not just focussing on outcomes per se when it comes to coaching

evaluation at the organisational level. If you can link to quantifiable financial or sales targets, that's great. If not, consider focussing on organisational barriers or enablers to successful transfer and change (and hence outcomes). The transfer climate within organisations and the opportunity for use are well researched organisational level areas that predict whether people use newly acquired learning and can be a useful proxy for understanding why outcomes and successes have or have not occurred. Doing this should allow organisations to make sense of any information they get about outcomes as well as generating feedback on things that can actually be changed.

Access a range of viewpoints. We suggest more corporate purchasers consider the potential value of more comprehensive evaluation packages. Differential viewpoints clearly exist and more than the view of just the coachees are needed for a fuller view of success criteria and achievement. Coaching is often viewed favourably by those being coached. This rings true to many corporate purchasers who may get very positive anecdotal reports from enthusiastic individuals and leave it at that. Be warned: you may get an overly rosy picture if you only ask those who have been coached. Value and success will look very different when observed by different audiences. Whilst your two main priority audiences may be the organisation as a whole and an individual who has been coached, don't forget the coaches, an individual's boss, the programme sponsor or budget-holder, the colleagues or team members of coachees and the coaching scheme organisers/managers.

Coaches

Our primary focus in this article has been on corporate purchasers. We recognise that many coaches are routinely encouraging their coachees to define and measure success as a matter of course and, we hope, many will welcome our call for organisations to become more 'intelligent' evaluators of coaching outcomes. Other coaches may feel that evaluation should remain part of the coach-coachee relationship and will be suspicious of an organisation's motives. It is not for us to tell other coaches what they should be doing. We simply believe that in an increasingly crowded marketplace for coaching suppliers, good coaches may need to do more to make sure they stand out. One way to enhance their professional credibility may be by demonstrating a willingness and ability to contribute to a company's thinking about its organisational level coaching evaluation strategy. For coaches wanting to go down this route we suggest two actions.

Be willing to engage in different evaluation processes. We urge all coaches to engage fully in evaluation processes and not just leave it to individual coaches

and their companies. One implication of this is that coaches will also need to be willing to use different evaluation tools for the different organisations they operate within. Coaches will therefore need to be less attached to their preference for their usual evaluation methods. By doing this, they can be more responsive to corporate purchasers' increasing need to 'own' or jointly own (with coaches and coaches) some aspects of the evaluation process.

Be pro-active about evaluation conversations. We hope that coaches will become braver about having up-front contracting conversations with prospective corporate purchasers which use and push the language of outcomes and success criteria. We would also hope more coaches will encourage their coaches to engage with their managers or HR departments about at least some of their objectives. In that way, organisations can be reassured about the existence of some line-of-sight between individual objectives and organisational objectives.

Alison Carter, Ph.D. and Helen Wolfe

Email: enquiries@employment-studies.co.uk

Website: www.employment-studies.co.uk

Dr Alison Carter is Principal Research Fellow at the Institute for Employment Studies (IES) in the UK, where Helen Wolfe is a Research Officer. Alison also heads up the IES HR Coaching Service, is a founding Director of the European Mentoring and Coaching Council (EMCC) and Co-Director of the UK's Employee and Management Development Research Network.

Máire Kerrin, Ph.D.

Email: m.kerrin@city.ac.uk

Dr Máire Kerrin is Director of Organisational Postgraduate Programmes in Psychology at City University, London. Máire has a particular interest in training evaluation methodologies, supply chain partnering, and knowledge management.

Endnotes

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- ¹³ Alison Carter, Máire Kerrin and Helen Wolfe, "Methods for evaluating coaching", IES Research Report No 410, UK, 2006 (forthcoming).
- ¹⁴ Jan Sherwood, "Does coaching actually work?", *International Journal of Mentoring and Coaching*, European Mentoring and Coaching Council (EMCC), 2004, Vol 3, Winter.
- ¹⁵ Government in the UK is not federal, but some services are provided by local authorities rather than from the center.
- ¹⁶ The National Health Service (NHS) provides the vast bulk of all healthcare provision in the UK, paid for from general taxation. This situation is quite unlike that in the US.
- ¹⁷ Alison Carter, "Practical methods for evaluating coaching", *Training Journal*, UK, January 2004.
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