



## Investigating the Role of Contextual Factors in Effectively Executing Communication Evaluation and Measurement: A Scoping Review

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## Investigating the Role of Contextual Factors in Effectively Executing Communication Evaluation and Measurement: A Scoping Review

### *Abstract*

*Purpose.* Evaluation and Measurement (E&M) remains a critical and debated topic among communication scholars and practice. Substantial research and professional efforts have been devoted to discussing what should be measured and which methods should be applied. Most of the E&M models seem to carry a positivist imprint. But, in real-life, organizations could not have clear aims, enough resources, or adequate informative systems to support E&M. Moreover, several contextual factors could affect the implementation of E&M management processes. The communication literature rarely highlights these factors. To fulfill this gap, the following article aims at theorizing the contextual factors relevant to the management of the evaluation process.

*Design.* A scoping literature review was carried out exploring the role of contextual factors and impact of contextual factors on E&M management processes. More specifically, the review examines the contribution provided by program evaluation and performance measurement fields of research.

*Findings.* The findings of the scoping review explain how both streams of thought argued the importance of contextual factors, such as organizational, relational, cultural, and communicative factors, for the success of any evaluation processes. The review underlined that the main evaluation models used in the field of communication have overlooked these studies and put on evidence the role of contextual factors in effectively executing communication evaluation and measurement.

*Originality.* The paper enriches the dominant rationale concerning the E&M management processes by incorporating literature on a) program evaluation and 2) performance measurement. The analysis could provide useful insights also from a professional perspective, by helping practitioners for a contextual assessment of strategic communication programs and activities.

**Keywords:** *Situational evaluation, performance measurement, contextual factors, program evaluation*

## INTRODUCTION

Since the 1960s, evaluation and measurement (E&M) remains a critical and much debated topic among communication scholars. Substantial research and professional effort have been devoted to discussing what should be measured and which methods should be applied.

Focusing on these questions is crucial, but in the meantime, it assumes that the effectiveness of E&M models' design and their successful execution mostly depend on the choice of the right metrics and research methods. In fact, most of the E&M models and frameworks seem to carry a positivist imprint, by conceptualizing communication programs as rational actions based on the program logic methodology objectives-means(inputs)-outputs-outcomes-impacts. This positivist rationale also implies that individuals operate with a goal-oriented, planning-focused, and information-driven culture within their organizations. Contra to this supposition, in real-life organizations often do not have clear aims, adequate resources, or adequate information systems to support E&M processes.

E&M processes can follow non-linear and uncertain paths in response to contextual factors (Pawson and Tilley, 1997; Swenson *et al.*, 2019). E&M processes can be very challenging, requiring a complex blend of elements, which may at times demand the resolution of conflicting needs. Morgan (2007), for instance, describes E&M as political processes, characterized by political alliances, bargaining, conflicts and compromises. Baskin and Aronoff (1988), for instance, analysed open and closed system evaluation, by recognizing and examining the role of factors outside the control of communication which could affect public relations' program results.

The influence of context in the E&M processes has been included in some of the models and frameworks more recently developed by communication scholars – for example, the integrated evaluation framework by AMEC (AMEC, 2017) and the Integrated Evaluation Model by Macnamara (2018). Nevertheless, the communication literature has largely

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3 overlooked these influential contextual factors. The debate so far has been focused on  
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5 identifying barriers preventing the advancement in E&M implementation (Swenson *et al.*,  
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7 2019). Much scholarship has explored the impact of the expertise and role of Chief  
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9 Communication Officers (CCOs) within successful measurement programs, but it  
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11 underestimates the role of organizational context (Swenson *et al.*, 2019).  
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15 In this conceptual article we argue that a plethora of contextual factors, such as for instance,  
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17 concerned parties' expectations or evaluative management styles, could affect the  
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19 implementation of any E&M process. More specifically, this article aims at theorizing the  
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21 contextual factors relevant to the management of the evaluation process. This paper explores  
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23 those factors which need to be taken into account to effectively support initial and ongoing  
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25 E&M implementation within the communication area.  
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29 The paper enriches the dominant extant academic debate concerning the E&M process in two  
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31 ways. Firstly, it provides a scoping literature review of the theoretical underpinnings of  
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33 performance measurement and program evaluation research, which helps close an identified  
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35 research gap in communication literature. Despite the differences between the two  
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37 approaches, they are complementary ways of acquiring and analysing information that is  
38  
39 intended to reduce uncertainty around programs (McDavid and Hawthorn, 2006). These  
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41 streams of thought underline a new research problem, namely, how to effectively implement  
42  
43 and execute an E&M system. Secondly, it proposes a categorization schema for the factors  
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45 shaping the E&M models' implementation.  
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49 In order to achieve its aim, this article is structured as it follows. The first part provides the  
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51 results of a scoping literature review focused on the extant communication E&M models and  
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53 identifies how both program evaluation and performance measurement streams of thought  
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55 argue the importance of contextual factors, such as organizational, relational, cultural, and  
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57 communicative factors, in the success of any evaluation process.  
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3 In the second part, insights from program evaluation and performance measurement fields of  
4 research are combined and discussed and insights are developed for a contextual assessment  
5 of strategic communication E&M programs and activities. Finally, limitations and future  
6 applications are discussed in the conclusive section.  
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## 12 13 14 **LITERATURE REVIEW**

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16 Communication studies have shown that in the design phase of communication programs the  
17 most fruitful approach might combine evaluation and measurement methodologies, by  
18 highlighting their complementary role (McDavid and Hawthorn, 2006; McDavid *et al.*, 2012).  
19 On the one hand, evaluation consists of systematic collection, analysis and interpretation of  
20 data and information concerning activities under scrutiny, in order to pass judgment on their -  
21 functioning as well as to guide further decisions and actions for all the involved actors (Patton,  
22 1998; Rossi *et al.*, 2003). On the other hand, “measurement is the process of translating  
23 constructs into procedures for collecting data” (McDavid and Hawthorn, 2006, p. 159).  
24 Combining evaluation and measurement within a single research design represents something  
25 more than a mere methodological exercise. It calls for a union between two divergent scientific  
26 domains: program evaluation and performance measurement. Since the 1960s, the  
27 communication literature largely has borrowed concepts, techniques, and methodologies from  
28 these two scientific domains. Among the inherited concepts, in both approaches, a certain  
29 weight has been given to the context within which E&M processes are embedded. For this  
30 reason, the paper provides a scoping review (Rumrill *et al.*, 2010) of the two different scientific  
31 domains of program evaluation and performance measurement.  
32  
33 As pointed out by Macnamara and Likely (2017), program evaluation is based on the  
34 assessment of “how programs can be designed and implemented to achieve their objectives”  
35 (p. 9), while performance measurement is based on measuring program outputs and outcomes,  
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3 without trying to recognize the extent to which the program has affected the outcomes (Nielsen  
4 *et al.*, 2013). Despite differences, both approaches provide useful insights concerning the role  
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6 of contextual factors in the effectiveness of E&M management processes.  
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10 A scoping literature review is a useful method to synthesize research findings embedded in  
11  
12 diverse disciplinary areas and to identify potential gaps in the research literature (Arksey and  
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14 O'Malley, 2005; Rumrill *et al.*, 2010). This paper follows the procedures discussed by Arksey  
15  
16 and O'Malley (2005) and illustrated by Rumrill *et al.* (2015) that can be summarized as it  
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18 follows: a) identify the initial research questions; b) identify the relevant studies; c) refine the  
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20 inclusion and/or exclusion criteria for selecting studies; d) organize data to represent the  
21  
22 descriptive elements of the scoping review; e) provide a narrative description for reporting  
23  
24 results.  
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28 The paper is framed around the following research questions:  
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30 *RQ1. What is the contribution provided by program evaluation and performance*  
31  
32 *measurement fields of research concerning the role and impact of contextual factors on*  
33  
34 *E&M management processes?*  
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37 *RQ2. Which insights can be drawn with regard to contextual factors influencing the*  
38  
39 *execution of communication E&M management processes?*  
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42 In order to answer these research questions, a search of the literature was performed across the  
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44 EBSCO – Academic Search Complete database. The paper takes into consideration relevant  
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46 studies and research conducted in the program evaluation and performance measurement fields.  
47  
48 Review includes studies which investigate and evidence the role of internal contextual factors  
49  
50 in E&M management processes. In anticipation of the findings, the identified literatures  
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52 focused on internal contextual factors that could drive how evaluation is undertaken: evaluation  
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54 questions and measures; evaluation approach and design; role of the evaluator and role of  
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3 stakeholders; evaluative culture; final reports; information technology support and use of  
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5 results.  
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8 The following sections provide a narrative description of the scoping review and they address  
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10 three main cluster of results: first, an analysis of the state of the art of communication E&M  
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12 research; second, the contributions published in the program evaluation domain; third, analysis  
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14 of studies and research in the performance measurement research area.  
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### 17 18 19 ***Communication E&M Research*** 20

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22 The growing relevance of E&M as a strategic activity for communication professionals has  
23  
24 given rise to a considerable amount of research during the last 40 years (Watson and Likely,  
25  
26 2013; Volk, 2016; Zerfass *et al.*, 2017; Macnamara, 2018a, 2018b).  
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28  
29 A wide range of studies has underlined a number of common concepts that underlie E&M  
30  
31 processes. For instance, multiple purposes can be fulfilled through E&M, primarily, formative  
32  
33 and summative (Scriven, 1996; Macanamara, 1999). For formative purposes, E&M help to  
34  
35 optimize the financial resources allocated to communication activities or help to improve and  
36  
37 prioritize communication strategies. For summative purposes, E&M processes can assist  
38  
39 communication managers in obtaining internal legitimacy by making communication value  
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41 more explicit and the results clearly beneficial in the eyes of the entire organization.  
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45 The importance of goal setting is an additional element common to E&M models to date. For  
46  
47 instance, among the earliest models, the Short and The Continuing Model of Evaluation by  
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49 Watson (2001) attributed a close relationship between the definition of communication  
50  
51 objectives and the choice of a specific evaluation model. Setting down clear and specific  
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53 objectives is also the first of the 10 Barcelona principles, a declaration set down in 2010,  
54  
55 revised in 2015 (AMEC, 2015) and agreed by more than 200 professionals from across the  
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57 world.  
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3 Communication scholars have also adopted a multi-level approach which identifies the stages  
4 of E&M. Hence, the concept of the “logic model” has gained predominance (Julian, 1997).  
5  
6 Logic models assume that inputs feed activities and in turn generate outputs, outcomes and  
7 impacts. Many communication frameworks follow the logic model approach to define the  
8 stages of E&M (i.e. outputs, outcomes and impacts) such as, for instance, the Yardstick Model  
9 (Lindenmann, 1997), the Preparation, Implementation and Impact (PII) model (Cutlip *et al.*,  
10 2000) and the Macro Model of PR Evaluation (Macnamara, 1997), the GCS Evaluation  
11 Framework (GCS, 2016), the AMEC integrated evaluation framework (AMEC, 2017) and the  
12 Integrated Evaluation Model (Macnamara, 2015, 2018). The main assumption underlying such  
13 frameworks is that the choice of metrics matters. Communication evaluators should replicate  
14 the logic model’s stages and identify proper metrics at each level. Other frameworks, such as  
15 the Communication Balanced Scorecard (Fleisher and Mahaffy, 1997; Ritter, 2003; Vos,  
16 Schoemaker, 2004; Zerfass, 2010), share the same basic assumption and offer a set of  
17 communication performance metrics which acknowledge a closer link between value created  
18 by communication activities and firm’s goals.

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Communication E&M models put a great emphasis on the methodological rigour and the use  
of research methods and techniques to collect valid and reliable results. To this end,  
traditionally quantitative research methods are given priority over qualitative ones, because  
collecting quantitative data seems to provide a more objective approach to reality (Daymon  
and Holloway, 2010). This way of examining reality emphasises unbiased assessment. Reality  
is seen as an entity that can be observed irrespective of the individuals who experience it, so  
factors are set aside from their natural context for measurement purposes (Morgan, 2007). In  
distinction to this, qualitative methods are characterized by an interpretative approach to the  
analysis of social reality: they take into account and explore the intentions, motivations and  
experiences of all involved actors (Daymon and Holloway, 2010; Grunig *et al.*, 2002). For this



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3 reason, qualitative methods highlight the relational dimension of the communication process.

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5 It is helpful to gain basic knowledge of unusual phenomena and provide some interpretations  
6  
7 of them (Ritchie, 2003).

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10 Using different approaches enables practitioners to describe, foresee and control the totality of  
11  
12 the communication process. An effective evaluation model does not limit the use of qualitative  
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14 methods to the experimentation stage, but merges them with quantitative ones to exploit the  
15  
16 benefit of both (Daymon and Holloway, 2010).

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19 One of the first evaluation models that underlines the role of contextual factors for  
20  
21 implementing an E&M process is the Measurement Tree model, elaborated in 2003 by the  
22  
23 Institute of Public Relations. The measurement model is graphically represented as a tree. The  
24  
25 roots are the communication objectives. The trunk stands for communication strategies and  
26  
27 tactics. The bark covering the trunk represents services, products and other company aspects,  
28  
29 which are made public. The sap going through the trunk embodies all those elements of  
30  
31 communication that can only be accessed by staff and employees. Branches refer to the target  
32  
33 audience, leaves are related to the public for which media relations plans are designed, and  
34  
35 flowers represent outcomes - all the changes in opinions, attitudes, and behaviours that  
36  
37 communication has produced in target audiences (Jin and Cameron, 2007). Finally, the tree is  
38  
39 planted into a natural environment, which refers to the market the organization operates in and  
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41 the organizational climate where the communication plan has been implemented. The  
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43 Measurement Tree model is one of the early evaluation models which take account of the  
44  
45 organizational context and the external environment and considers them as factors influencing  
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47 results. Nevertheless, the Measurement Tree model does not help communicators deepen their  
48  
49 understanding of which specific environmental factors can impact the implementation of E&M  
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51 management processes; it provides just a generic outline of the environment in which they are  
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53 embedded.  
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3 Other recent and well-known models, such as the GCS Evaluation Framework (GCS, 2016),  
4 the AMEC integrated evaluation framework (AMEC, 2017) and the Integrated Evaluation  
5 Model (Macnamara, 2018), value both internal and external organizational contexts where the  
6 E&M management processes take place and recognise this can affect their design, but they do  
7 not investigate in detail the nature of these factors.  
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10 Overall, current studies focused on E&M management processes and their implementation in  
11 the communication field lack a detailed analysis of those contextual factors affecting execution  
12 of E&M processes that could be organizational, relational, cultural and communicative. By  
13 reviewing the research in the fields of program evaluation and performance measurement these  
14 contextual factors can be identified and categorized.  
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### 28 ***Program Evaluation Research***

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30 The conceptual roots of most communication E&M models lie within the expanded domain  
31 of program evaluation, which places special emphasis on the application of social research  
32 methods to address evaluation questions and formulate sound judgements (Fitzpatrick *et al.*,  
33 2004). The origin of the scholarly inquiry on evaluation research can be traced back to the  
34 end of the 1950s. Evaluation research, or program evaluation, can be defined as “a social  
35 science activity directed at collecting, analyzing, interpreting and communicating information  
36 about the workings and effectiveness of social programs” (Rossi *et al.*, 2003, p. 2). Social  
37 programs are designed to ameliorate a social problem (i.e. delinquency prevention programs)  
38 or improve social conditions (i.e. public housing programs), in specific areas such as public  
39 health, welfare and education.  
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53 Until the 1980s, evaluation research theory focused attention on the distance between the  
54 actual inputs and the expected impacts of a programme, the so-called “black box”. Since the  
55 main purpose of program evaluation consists of understanding how much of the observed  
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3 impacts of a program could be attributed to the invested inputs, the experimental technique  
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5 has always been considered as the research design par excellence (Cooper *et al.*, 2006). In  
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7 experimental studies, both the internal validity (causality links among inputs and outcomes)  
8  
9 and the external validity (generalization of results) of a program are the main concerns. By  
10  
11 definition, using an experimental design means to implicitly assume that every program  
12  
13 occurs in a vacuum. In other words, nothing, with the exception of inputs, can affect the  
14  
15 expected outcomes and impacts of a programme.  
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19 Since the 1980s, so-called theory-based approaches challenged these assumptions by positing  
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21 that black boxes should have been opened and by arguing that evaluation practices should  
22  
23 have been aimed at examining the interrelationships among inputs, outputs and outcomes  
24  
25 (Weiss, 1997). The relevant literature on Theory-Based Evaluation (TBE) between 1980 and  
26  
27 1990 yielded a new wave of “opened black boxes” approaches. The conceptual rationale  
28  
29 underlying TBE is based on the notion of “bounded rationality”, which can be defined as “the  
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31 limits upon the ability of human beings to adapt optimally, or even satisfactorily, to complex  
32  
33 environments” (Simon, 1991, p. 132). Therefore, programs could function completely  
34  
35 differently from being intended, since outcomes and impacts will depend on how the  
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37 mechanisms that are supposed to be at work within a program, will be enacted in a given  
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39 context. Most of the evaluation models assume that individuals operate with a goal-oriented,  
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41 planning-focused, and information-driven culture within their organizations. But, in real-life  
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43 situations people experience quite different situations.  
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49 Thus, *evaluators* should be aware of the contextual factors affecting the outcomes and  
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51 impacts of a program, for instance, concerned parties’ expectations are crucial to inhibiting  
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53 impacts from happening or enabling a program to produce intended results. According to  
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55 TBE, evaluators must take into account the legitimate concerns of those individuals who can  
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57 affect (or be affected by) evaluation’s results (Pawson and Tilley, 1997; Scriven, 1996). This  
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3 means evaluators need to be aware of possible *evaluation questions* that could arise from  
4 stakeholder interests during the communication program and which may impact on the  
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8 *measures* that have to be taken into account in evaluation.  
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10 Pawson and Tilley (1997) argue that the principal goal of evaluation research is to understand  
11 what works best, for whom, in what circumstances, and why. Hence, theories, not methods,  
12 should be put at the centre of any evaluation design and implementation. No method is seen as  
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17 the single gold standard, but TBE approaches combine all methods that could be suitable  
18 without privileging any one of them. TBE reflected the importance of addressing the needs of  
19 those who have an interest in the evaluation process (Scriven, 1996).  
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23 Other scholars are primarily concerned with the methodological aspects of evaluation and  
24 more specifically the *evaluation approach and design* (Weiss and Bucuvalas, 1980;  
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28 Fetterman *et al.*, 1996) and argue that priority should be accorded to information holders,  
29 who ensure the timely collection of reliable data.  
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33 Morgan (2007) states that evaluation aims could be affected by eventual compromises  
34 developed between competing coalitions. Sometimes aims could appear ambiguous and weak  
35 in an attempt to satisfy stakeholders with different needs. Here, Morgan's vision (2007) of how  
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40 assessment processes take place within organizations appears realistic and concrete. The author  
41 claims a “pragmatic approach”, as a new paradigm leading social research methods, which  
42 emphasizes the relevance of shared meaning and joint actions in evaluation management  
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47 processes. As Morgan (2017) argues “the essential emphasis is on actual behavior (“lines of  
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52 action”), the beliefs that stand behind those behaviors (“warranted assertions”), and the  
53 consequences that are likely to follow from different behaviors (“workability”)” (p. 67).

54 Rossi *et al.* (2003) use the concept of “social ecology of evaluation” to address the social arena  
55 where evaluations are implemented, since organizational members’ attitudes towards  
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60 evaluation could vary. Referring to this practice, additional contextual factors are again related

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3 to the *role of stakeholders* involved in the program evaluation process and to the *role of*  
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5 *evaluators* themselves (Fetterman *et al.*, 1996; Ask *et al.*, 2012; Patton, 1998).  
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8 Fetterman *et al.* (1996) address the concept of Empowerment Evaluation, “an approach to  
9  
10 gathering, analyzing, and using data about a program and its outcomes that actively involves  
11  
12 key stakeholders in all aspects of the evaluation process” (p. 814). The rationale underlying  
13  
14 this perspective lies in the crucial role of collective and collaborative interpretation, discussion  
15  
16 and reflection on evaluation findings. The more closely stakeholders are engaged, the more  
17  
18 likely they are to use results to improve their work.  
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21 Over the last few years, constructivist approaches to evaluation which enhance engagement  
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23 have acquired more relevance, such as, for example, participatory, collaborative, and  
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25 empowerment evaluations (Askew *et al.*, 2012).  
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28 Since evaluation processes refer to multiple stakeholders, the aspiration of satisfying all  
29  
30 stakeholders’ expectations appears unrealistic and so the evaluator’s role can be seen as  
31  
32 making decisions about the order and priority of stakeholders. Taking a utilization-focused  
33  
34 evaluation approach, Patton (1998) points out that evaluation should provide strategic support  
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36 to decision-making processes and therefore the final users of results are given more priority  
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38 among stakeholders.  
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42 Turning to the *role of evaluators*, this can be affected by the *evaluative culture* (Julian, 1997;  
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44 Jackson, 2013; Mayne, 2008). According to TBE, logic models can be most useful when  
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46 integrated with the *theory of change*. Logic models are concerned with how programs ideally  
47  
48 work, by representing them as sequences of steps from inputs to the final impacts (Julian,  
49  
50 1997) whereas theory of change establishes a clear understanding of how a program actually  
51  
52 works. Theory of change refers to “the construction of a model that specifies (usually  
53  
54 visually) the underlying logic, assumptions, influences, causal linkages and outcomes of a  
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56 development program or project” (Jackson, 2013, p. 97). Through the theory of change,  
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3 increasingly it has become clear in TBE studies that the contextual factor of *evaluative*  
4 *culture*, affected for instance by different management styles, can impact the functioning of a  
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6 program, and in turn, its effects. In fact, programs are the results of the aggregation of a  
7  
8 larger set of assumptions, risks, and contextual factors.  
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12 Moreover, any organization features a more or less explicit evaluative culture, which  
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14 “denotes an organizational culture that deliberately seeks out information on its performance  
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16 in order to use that information to learn how to better manage and deliver its programmes and  
17  
18 services, and thereby improve its performance” (Mayne, 2008, p. 1). According to Mayne  
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20 (2008) a number of factors foster an evaluative culture: committed organizational leaders,  
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22 regular communications on results management, a balance between accountability and  
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24 learning, capacity for results management, supportive structures and policies.  
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28 Evidently, an organizational culture focused on quantitative measures and/or economic  
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30 outputs will encourage professionals to apply strategies assigning an economic value to  
31  
32 communication results. Therefore, auditing the evaluative culture is a necessary condition for  
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34 program evaluation because evaluation itself is a contextual process and is affected by the  
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36 organizational situation in which it takes place. Auditing the evaluative culture is also  
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38 important in order to understand the environment in which evaluation will take place and to  
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40 make changes to solve problems as a result of that environment that might affect the  
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42 evaluation.  
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46 Finally, contextual factors relate to *the support of information technology*, to the way *final*  
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48 *reports* are created and to *using results* (McDavid and Hawthorn, 2006; Macnamara, 2014;  
49  
50 Macnamara and Likely, 2017; Knowlton and Phillips, 2013).  
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52  
53 According to McDavid and Hawthorn (2006), in order to implement an E&M management  
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55 process, it is necessary to take into account and establish the multi-channel ways of  
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57 communicating to facilitate the sharing of information, measurement problem identification,  
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3 and solving. Information technology has to be tailored to the program that needs to be  
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5 evaluated and *final reports and the use of results* have to be customized and negotiated by  
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7 stakeholders. Program evaluation scholars evidence the crucial role of iterative planning that  
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9 uses results and findings collected at each stage of the program evaluation process in order to  
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11 adjust strategies and tactics (Macnamara and Likely, 2017). Knowlton and Phillips (2013) for  
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13 instance depict program evaluation as a cycle characterized by an iterative approach.  
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### 19 ***Performance measurement research***

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21 At the turn of 21<sup>th</sup> century in the USA, performance measurement became a critical and much  
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23 debated issue, since it was connected primarily with financial accountability to measure costs  
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25 and outputs of governmental programs. Performance measurement can be distinguished from  
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27 performance management. Performance measurement “provides the basis for an organisation  
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29 to assess how well it is progressing towards its predetermined objectives, helps to identify  
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31 areas of strengths and weaknesses, and decides on future initiatives, with the goal of  
32  
33 improving organisational performance” (Amaratunga and Baldry, 2002, p. 218). Performance  
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35 management can be defined as “the use of performance measurement information to effect  
36  
37 positive change in organizational culture, systems, and processes by helping to set agreed-  
38  
39 upon performance goals, allocating and prioritizing resources, informing managers” (Sachs,  
40  
41 2011, p. 58).  
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47 As previously discussed, performance measurement and program evaluation are  
48  
49 complementary ways of acquiring and analyzing information about a program and they rely  
50  
51 on a common core of methodologies (McDavid *et al.*, 2012).  
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54 Concerning the contextual factor of *evaluation questions and measures*, while program  
55  
56 evaluation allows users to address questions of why observed programs results occurred,  
57  
58 performance measurement is more focussed on cost-effectiveness and describes patterns of  
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3 actual programs and organizational results (McDavid *et al.*, 2012). In other words,  
4  
5 performance measurement describes what is going on, but it does not explain why it is  
6  
7 happening. Measures usually derive from strategies and are clearly identified and simple to  
8  
9 understand and use (Lynch and Cross, 1991; Maskell, 1989; Neely *et al.*, 1996). Similarly,  
10  
11 also the *evaluation approach and design* in the performance measurement literature are  
12  
13 considered as a routine to replicate (Neely *et al.*, 2000).  
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16  
17 Within the performance measure field, managers play *the role of evaluators*, that means they  
18  
19 determine the main aspects on which program and employee are assessed and they identify  
20  
21 the consequences related to the measured performances (Kerssens-van Drongelen and  
22  
23 Fisscher, 2003).  
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26  
27 Moreover, since the introduction of performance measurement is an important change to the  
28  
29 organization's way of doing business, it is important that there are organizational leaders who  
30  
31 are considered champions of this in order to provide continuous support to the process and to  
32  
33 exert the power of evaluator. However, measurement sometimes increases uncertainty among  
34  
35 managers since results are unpredictable and therefore some of them resist the introduction of  
36  
37 performance measurement.  
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41 Concerning *the role of stakeholders*, results are shared among them. According to Band  
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43 (1990), performance measures should have support from management and stimulate  
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45 engagement among stakeholders in order to create a feedback loop that enriches the  
46  
47 interpretation of results.  
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50  
51 Over the last 20 years, the performance measurement (PM) literature has moved from  
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53 considering the structural and technical features of the measurement process to examining  
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55 contextual factors, such as *the evaluative culture* and management style, as well as other  
56  
57 behavioural aspects (Neely, 2005). Here, context relates to organizational, relational, social  
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59 and cultural factors that could affect how the measurement process is implemented and how  
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3 measurement results are used to improve organizational performance. When a measurement  
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5 system is context-sensitive it has reached a high level of maturity: “Maturity, in the context  
6  
7 of PM, is defined as the ability to respond to the environment in an appropriate manner  
8  
9 through performance measurement & management practices” (Bititci *et al.*, 2015, p. 25). A  
10  
11 positive relationship exists between the maturity of the performance system and the quality of  
12  
13 obtained performance. If the measurement system is mature, it is context-optimized, results  
14  
15 are used effectively to support managerial routines based on communication, which in turn  
16  
17 facilitates informed-decision making and helps to establish an organizational learning culture  
18  
19 (Neely, 2005). Scholars also emphasize the role of cultural differences among those involved  
20  
21 in evaluation processes which is crucial in shaping attitudes and orientations toward  
22  
23 evaluation and measurement (Mattila, 1999; Winstead, 1999). Kravchuk and Schack (1996)  
24  
25 suggest that the most appropriate metaphor to build a performance culture is the *learning*  
26  
27 *organization* by Senge (1990).  
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32  
33 In order to learn from results, organizations need to rely on *information technology*  
34  
35 *procedures* that not only support data collection, but also facilitate the top-down, bottom-up  
36  
37 and horizontal sharing of information and help with problem identification and problem  
38  
39 solving (Wettstein and Kueng, 2002).  
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41

42 Results obtained through information technology procedures are translated into *final reports*  
43  
44 that are developed through routinized processes (Douwe *et al.*, 1996). *The use of such results*  
45  
46 ideally evolves over time as management guides the performance measurement process  
47  
48 (Hatry, 2006).  
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## 52 53 **DISCUSSION**

54 To draw together what has been explored in the previous section, the following table 1  
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56 compares the different roles that contextual factors play within program evaluation and  
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3 performance measurement perspectives. While considering their centrality, each of the two  
4 perspectives conceptualizes in a different way the contextual factors in the evaluation  
5 process.  
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10 [Please insert table 1 here]  
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### 14 ***Role of contextual factors in program evaluation and performance measurement (RQ1)***

15  
16 In sum they begin to answer RQ1. Concerning the first two factors in table 1 (evaluation  
17 questions & measures, and evaluation approaches & designs), *program evaluation* includes  
18 ad hoc, tailor-made, and customized processes taking into account organizational evaluation  
19 needs.  
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25  
26 *Performance measurement* refers to routinized and regularized processes, which are  
27 performed on an ongoing basis. Program evaluation holds in high regard the criteria used to  
28 select measures since they have to be fully aligned to the purposes of the measurement  
29 process. With performance measurement the selection of measures takes place on a one-off  
30 basis and their collection is seen as a routine practice. According to program evaluation ad  
31 hoc measures are identified for each evaluation process. Program evaluation attaches great  
32 importance to the fact that the research methods used have to be built on sound scientific  
33 grounds in order to ensure the replicability of the evaluation process. However, scientific  
34 approaches entail methodological skills, longer implementation time, and more resources.  
35  
36 Concerning the second set of factors (*role of evaluator, role of stakeholders, and evaluative*  
37 *culture*), the two perspectives have some similarities and differences. In program evaluation,  
38 the *role of the evaluator* is to guarantee the right research design, according to his/her  
39 expertise. However, in performance measurement, given the evaluation process is essentially  
40 a management activity, the manager plays the role of an evaluator in charge of selecting,  
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3 collecting, and interpreting metrics as well as of strategically managing the whole  
4 measurement process.  
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7 Identifying *stakeholders' expectations* of the evaluation and measurement process is crucial.  
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9  
10 Individuals other than communication managers and technicians might be interested in the  
11 evaluation process, so they have to be properly informed and their needs met. Program  
12 evaluation identifies stakeholders at the beginning of the process in order to understand their  
13 needs and expectations, but in performance measurement, stakeholders are informed about  
14 results through periodic reports.  
15

16  
17 Organizational members' attitudes towards evaluation could vary. All organizations feature a  
18 more or less explicit *evaluative culture*, which includes the set of measures that the  
19 management regards as important as well as the goals to be measured through the evaluation  
20 (e.g. a tool for punishing or rewarding staff for improved performance). Auditing the  
21 evaluative culture is also important to understand the current state of affairs and to make  
22 changes to solve any issues that might affect the evaluation. Similarly, performance  
23 measurement should be aligned with the managerial systems used by organization otherwise  
24 it could create separate information chains and prompt criticism by organizational subjects.  
25

26  
27 Addressing the last group of factors (*IT support, final report, and use of results*), the  
28 communication of results is an essential part of measurement and evaluation processes. How  
29 the results are communicated could be different according to the used approach. Within  
30 program evaluation, *reports* are created ad hoc, while in performance measurement, reporting  
31 activity is continuous, systematic, and follows standardized procedures. Moreover, in  
32 performance measurement, *information systems* provide data from different sources, which  
33 are automatically integrated, elaborated, and systematized in standard reports. The use of  
34 information systems is less systematic within program evaluation.  
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3 ***Influencing contextual factors for E&M management processes in the communication***  
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5 ***field (RQ2)***  
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7 The analysis of the role of contextual factors in program evaluation and performance  
8 measurement studies reveals a new research issue which deserves attention: the need to  
9 investigate how to effectively implement and execute E&M management processes and what  
10 those contextual factors are which constitute potential sources of strength and weakness, by  
11 going beyond looking at the individual competencies and demographics of communicators as  
12 well as the time and budget available for E&M processes.  
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14

15 Specifically, the contextual factors previously discussed have been clustered in four groups.  
16 Each cluster is related to the perspective driving how evaluation is undertaken within the  
17 internal context. E&M processes can be affected by multiple factors, such as organizational  
18 characteristics, cultural traits, relational attributes and communicative features characterizing  
19 the internal context. This paper argues that these factors included in each cluster need to be  
20 addressed in order to guarantee effective implementation of E&M management processes.  
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23 Figure 1 synthesizes the underlying clusters a) evaluative capacity and history  
24 (*organizational context*); b) evaluative culture and leadership (*cultural context*); c)  
25 stakeholder-evaluator relationship (*relational context*); d) evaluation communicative network  
26 (*communicative context*).  
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29 [Please insert Figure 1 here]  
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32 ***Evaluation capacity and history (organizational context)***  
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35 Evaluation capacity is the knowledge, behavioural and affective skills that enable employees  
36 to think more positively about evaluation (Duffy, 2007; Preskylly and Boyle, 2008; Stockdill  
37 *et al.*, 2002). Building evaluation capacity is an essential step for the effective execution of  
38 E&M management processes, because it enables people to embrace systematic enquiry.  
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41 Systematic enquiry lies in routinely asking questions and seeking answers (Preskill and  
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3 Boyle, 2008). As previously noted, participative and collaborative forms of E&M are  
4 becoming more popular (Patton, 1998). Participation encourages learning, but evaluative  
5 capacity needs further strategies if it is to be developed. Dedicated training, technical  
6 assistance, written materials, communities of practice, meetings are concrete examples of  
7 strategies to teach people how to conduct evaluation (Preskill and Boyle, 2008).  
8  
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10 Understanding at what stage in the organizational lifecycle the evaluation process is carried  
11 out is pivotal for communication managers. For instance, the needs of a company that wants  
12 to evaluate internal communication in the normal course of business will be different from  
13 those of a company that experiences a significant process of change to its identity and core  
14 values. Accordingly, the evaluation process will depend on the situation in which the  
15 organization finds itself and the strategies put in place.  
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18 The first action that should be done to devise an effective evaluation management process is  
19 to analyse current and past communication activities and processes and the procedures put in  
20 place to do that. Neglecting what has already been done, setting a benchmark, is important so  
21 that new data can be interpreted. Existing evaluations should be scrutinised by looking at the  
22 measures in place without being distracted by the way results are collected. Prior to auditing,  
23 it is also advisable to look at case histories and studies from other organizations that involve  
24 topics the organization under examination might be interested in. In other words, the  
25 evaluator should assess if other organizations have dealt with the same questions at the time  
26 of evaluation and what answers have been given in order to build on or move away from their  
27 approach.  
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### 30 *Evaluative culture & leadership (cultural context)*

31 An evaluative culture is a set of “shared and persisting positive beliefs about the value of  
32 evaluation to the organization and enduring commitment to evaluation practice and the use of  
33 findings among its members” (Preskill and Boyle, 2008, p. 451). Since any organizational  
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3 culture consists of unwritten and unspoken guidelines on how to get along in an organization  
4 and conveys a sense of identity to employees (Mayne, 2008), an evaluative culture is a part of  
5 an organizational culture that values evidence-based learning.  
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10 Evaluative culture can be characterized as a culture of results (Siddiquee, 2010), a culture of  
11 performance (Peters, 2004) and a culture of inquiry (Dana *et al.*, 2002). Marr (2006) makes a  
12 distinction between “Command & Control” vs “Enabled Learning Environment” cultural  
13 approaches to evaluation. In “Command & Control” cultures, the focus is exclusively on the  
14 attained outcomes, without any interest in setting up effective learning circles. Such a cultural  
15 approach might generate misbehaviours, frustration and fear of results because people are  
16 exclusively assessed on results without any learning on how to improve their performance.  
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18 Conversely, creating an “Enabled Learning Environment” means working on the results to  
19 gain insights and seek out new ways of undertaking daily activity.  
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30 Leadership has been considered an important topic in the field of management and has a huge  
31 literature which cannot be fully considered here, however, evidence indicates that there is a  
32 close relationship between leadership style and the effective implementation of E&M  
33 management processes (Obiwuru *et al.*, 2011). Managers can adopt a different leadership  
34 style in implementing E&M management processes depending on whether: others help them  
35 to achieve their objectives more efficiently and effectively; results are linked to valued  
36 rewards; and, they have the resources needed at their disposal to accomplish the desired aims.  
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47 The literature distinguishes between transformational and transactional leaders:

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49 “Transformational leaders are likely to be more effective than transactional leaders at  
50 inspiring followers to identify with a mission while rallying them to work together to achieve  
51 higher performance” (Kahai *et al.*, 2003, p. 500). Communication managers hence need to  
52 reflect upon evaluation culture and leadership commitment to E&M processes. They play a  
53 pivotal role in shaping evaluative culture by helping communication staff to engage with  
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3 E&M management processes and coordinating collective efforts to ensure the right quality of  
4 data is collected. If the leaders' commitment to E&M is high, it indicates that the  
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6 organization places importance on outcomes and on their use in decision-making.  
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9  
10 *Stakeholder-evaluator relationship (relational context)*  
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12 Every evaluation represents a nexus in a set of political and social relationships. While  
13 developing an evaluation plan, each evaluator should carefully analyse the context of  
14 evaluation to determine who the evaluation stakeholders are, what they want, and why they  
15 want what they want (Rossi *et al.*, 2003). Stakeholders' expectations about performance are  
16 also at the centre of performance measurement research. "Good performance management  
17 requires that a manager knows when expectations have been accomplished and is able to  
18 demonstrate this. Clear and concrete expectations about the outputs and outcomes to be  
19 accomplished enable a manager to do this, and to know how successful a program has been  
20 and where improvements are required" (Mayne, 2004, p. 35).  
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33 For nurturing effective relationships with those with interests in the programs high quantity  
34 contact is vital. In communication E&M, this concerns specifically top managers and other  
35 internal partners. More specifically, Torres *et al.* (1997) suggest maintaining close contact  
36 with stakeholders along the different phases of the evaluation process through ongoing  
37 communication, periodic meetings, and informal conversations.  
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45 At the same time, the evaluator should prioritize stakeholders since the type of relationships  
46 varies depending on the stakeholder considered. Patton (1998) assumes that each evaluation  
47 process should point out who will use results. Dissemination of results should be clearly  
48 addressed to primary stakeholders (e.g. top managers, collaborators, internal partners) and  
49 secondary stakeholders (e.g. journalists, customers, service providers or agencies), by using a  
50 language suitable to their concerns and depending on what aim the evaluation has. In terms of  
51 the *mode* of relationships, more and more organizations call for evaluators to work  
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collaboratively with stakeholders, by implementing participatory or engaging forms of evaluation (Patton, 1998) and empowerment evaluation models (Fetterman *et al.*, 1996).

#### *Evaluation communicative network (communicative context)*

Evaluation rests on collecting real-time and up-to-date information derived from a variety of sources. For this reason, the evaluator should primarily identify the sources and set up an information network to gather data, providing network members with tools and guidelines to make data usable and reliable. Sustainable E&M practices require systems, processes, policies, and plans that help embed evaluation work into the way the organization accomplishes its strategic mission and goals (Preskill and Boyle, 2006, p. 444). Currents trends in communication field related to big data, digital transformation and artificial intelligence (Forbes Communication Council, 2018) have posited new challenges to communication departments and practitioners on how data can be analyzed and what technological and organizational infrastructure are needed to strategically convert these insights into actionable decisions.

As noted previously, the identification of metrics in use is one of the main streams of communication research. It is crucial to understand the metrics used by other functions, if, for instance, they are more financial or non-financial related, quantitative or qualitative. It might also be relevant to understand the CEO's satisfaction with E&M processes employed by other functions. In some cases, management prefers dealing with numbers so the outcomes of the evaluation process should be expressed in numerical terms if possible. In other cases, words are preferred when reporting results (Antonioni, 1996; Waldman *et al.*, 1998). Interestingly, Ferstl and Bruskiwicz (2000) found that, when provided with the same results in a quantitative and then a qualitative format, managers pay more attention to the latter.

## **CONCLUSIONS, LIMITATIONS AND FUTURE TRENDS**



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3 Evaluation and Measurement (E&M) is a critical topic of inquiry among communication  
4 scholars and practitioners. Considerable research and professional efforts have been addressed  
5 so far to discussing what should be measured and which methods should be implemented. Most  
6 of the E&M models seem to carry a positivist imprint, but, in real organizational life,  
7 organizations could not have clearly defined aims, sufficient resources, or adequate informative  
8 systems to support E&M management processes.  
9

10 Our scoping review has shown that evaluation and measurement of strategic communication  
11 practices mainly borrow principles from two disciplinary domains: program evaluation and  
12 performance measurement. By analyzing the legacy of studies on program evaluation and  
13 performance measurement and combining the insights with communication research, we  
14 identified multiple contextual factors which impact the execution of an E&M management  
15 process: evaluation questions and measures; evaluation approach and design; role of the  
16 evaluator and role of stakeholders; evaluative culture; final reports; information technology  
17 support and use of results.  
18

19 However, strategic communication literature has so far largely neglected to consider contextual  
20 factors when exploring barriers as obstacles of E&M implementation in practices. To fulfill  
21 this gap, this article has theorized the contextual factors relevant to the management of the  
22 evaluation process. In fact, only a few studies in communication have focused on contextual  
23 factors affecting E&M management process success or failure. Against this background, this  
24 article begins to fill an apparent gap by categorizing those factors affecting any E&M  
25 management process into four clusters. Thereby, this article extends current thinking on  
26 communication E&M in three ways. First, it explicitly includes the importance of a fit between  
27 the main features of the organizational evaluative environment and the E&M management  
28 process. Second, it explicitly addresses the role of relationships among evaluators and  
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3 evaluation stakeholders. Finally, it explores the role of technology and the use of E&M results  
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5 in order to manage reliable and meaningful E&M management processes.  
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8 The findings of this scoping review demonstrate that there are great opportunities for  
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10 additional research deepening knowledge about the implications of contextual factors within  
11  
12 evaluation management processes in the strategic communication area.  
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15 For what concerns implications for practice, it is argued that methodological sophistication and  
16  
17 scientific rigour are frequently the first elements considered when setting up a plan for  
18  
19 measuring communication outcomes. While there is no doubt that these are critical,  
20  
21 practitioners should bear in mind that effective evaluation and measurement strategies are built  
22  
23 upon factors including organizational, cultural, relational, and communicative ones. Several  
24  
25 studies in the field of program evaluation and performance measurement have already  
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27 evidenced that measurement is not a linear process. But, communication professionals have  
28  
29 not yet fully embraced the importance of developing a full awareness of which factors, besides  
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31 the methodological ones, can influence the effectiveness of an evaluation management process.  
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33 Hence, it is argued that considering contextual factors, such as the organizational (evaluative  
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35 capacity and history), cultural (evaluative culture and leadership), relational (stakeholder-  
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37 evaluator relationship), and communicative ones (evaluation communicative network), will  
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39 help communication managers better deal with stakeholders' expectations of evaluation while  
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41 at the same time gaining trust in the eyes of those organizational managers demanding that  
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43 communication activities and programs are evaluated. The absence of empirical data represents  
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45 the first limitation of the article that future research could address: the contextual factor-based  
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47 clusters identified need to be tested empirically ideally via qualitative and quantitative case  
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49 studies. Second, our scoping review has not covered the entire literature about evaluation  
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51 program, performance measurement and performance management streams of research: future  
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53 research could enrich the list of contextual factors that could affect the E&M processes. Since  
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our review has focused on examining internal context, future studies could address the analysis of external context by identifying contextual factors that could affect E&M processes outside the organization.

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**Table 1. Comparison between the role of contextual factors in Program Evaluation and Performance Measurement studies**

<b>Contextual factors</b>	<b>Program Evaluation Literature</b>	<b>Performance Measurement Literature</b>
1. Evaluation questions & measures	Questions emerge from stakeholder interests at one point in time (issue specific) <i>(Pawson and Tilley, 1997; Scriven, 1996)</i>	Routinised, concerning general management issues <i>(McDavid et al., 2012; Lynch and Cross, 1991; Maskell, 1989; Neely et al., 1996)</i>
2. Evaluation approach & design	Selected at the beginning of the process and driven by ad hoc needs on communication projects <i>(Weiss and Bucuvalas, 1980; Fetterman et al., 1996; Morgan, 2007; Rossi et al., 2003)</i>	Assumed, measurement is a routine; designed for providing regular information for organization <i>(Neely et al., 2000)</i>
3. Role of evaluator	Evaluator as an external auditor <i>(Patton, 1998)</i>	Managers are evaluators <i>(Kerssens-Van Drongelen and Fisscher, 2003)</i>
4. Role of stakeholders	Collaborative, empowering, participatory <i>(Fetterman et al., 1996; Askew et al., 2012)</i>	Results are shared among evaluation stakeholders <i>(Band, 1990)</i>
5. Evaluative culture	Evaluator should analyse evaluation culture <i>(Julian, 1997; Jackson, 2013; Mayne, 2008)</i>	Aligned between measurement and organizational systems <i>(Neely, 2005; Bititci et al., 2015; Mattila, 1999; Winstead, 1999; Kravchuck and Schack, 1996)</i>
6. Final reports	Reports are customized <i>(McDavid and Hawthorn, 2006; Macnamara and Likely, 2017; Knowlton and Phillips, 2013)</i>	Reports are developed through routinized processes <i>(Douwe et al., 1996)</i>
7. Information Technology support	Seldom used, tailored to the project evaluated <i>(McDavid and Hawthorn, 2006; Macnamara and Likely, 2017; Knowlton and Phillips, 2013)</i>	Relied on IT procedures for ongoing collection of data <i>(Wettstein and Kueng, 2002)</i>
8. Uses of results	Uses are usually negotiated up front <i>(McDavid and Hawthorn, 2006; Macnamara and Likely, 2017; Knowlton and Phillips, 2013)</i>	Uses evolve over time due to management's needs <i>(Hatry, 2006)</i>

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**Figure 1. Clusters of contextual factors for an effective E&M Management Process**

