Suggested Guidelines for Reflective Case Narratives: Structure and Indicators

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Suggested Guidelines for Writing Reflective Case Narratives: Structure and Indicators

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Abstract

Reflective case narratives are a practical mechanism for conveying lessons learned for practice improvement. Their ability to transform experience into knowledge in a colloquial, narrative style positions reflective case narratives as a powerful learning tool with pedagogical benefits for the evaluation community. However, one criticism of reflective case narratives is they suffer from loose guidelines and lengthy discussions that obscure lessons learned. Through the use of adult learning theory a restructuring of reflective case narratives is presented to facilitate learning. The restructuring consists of five sections to increase the likelihood of reflective case narratives as a resource for transferring knowledge, sharing ideas, and keeping a pulse on the dynamic and fluid process of evaluation.

Keywords: reflective case narrative, teaching evaluation, adult learning, qualitative methods, subjectivity

Sharing information is important for the field of evaluation to move forward. Adult learning theory suggests for the shared information to be processed it must be engaging and encourage reflection (Knowles, 1950; Rogers, 1969). Reflection is defined as a systematic way of thinking about one's actions and responses in an effort to improve future actions and responses (Sherwood & Horton-Deutsch, 2012). It is the driving force, the analytical power that implies purpose (Dewey 1933), and provides the foundation for analyzing real-world situations.

By considering what one knows, believes, and values within the context of an event, reflection supports evaluators to bring into awareness what they sense, but cannot explain and develop their intuitive processes (Johns, 2009). While reflection encourages learning on an individual level, the insights gained can be understood by others through vicarious learning (Bandura, 1962). To capitalize on this learning opportunity, evaluators need to be more deliberate about encouraging reflection and disseminating the knowledge gained.

A case study is one way evaluators share information; it is a powerful mechanism to evaluate unique programs and it excels in offering rich details, gleaned from both qualitative, quantitative as well as experimental or observational data. The narrative portion of the case study is where reflection could be deliberately encouraged as it is the "rich information" to which Lincoln & Guba (1989) referred.

The problem is narratives are written at the discretion of the writer who may not have engagement and reflection as end goals. Introducing structure to the narrative can prompt writers to engage in reflection and facilitate the transfer of knowledge. The need for structure and how much to provide is informed by the self-efficacy literature (Zimmerman, Bandura & Martinez-Pons, 1992). Self-efficacy increases when one experiences success. The key is to create opportunities to experience success. Creating just the right opportunity for success is challenging: too much or too little influence and learning will not occur. A thoughtful, deliberately structured narrative—a reflective case narrative—creates the ideal opportunity to encourage reflection, and ultimately, mastery of the topic.

In this article, we first discuss case study methodology, the use of narratives and reflection in evaluation, and then identify the problems inherent with reflective case narratives. Then, we provide suggested guidelines to make the reflective case narrative an efficient tool for evaluators to make knowledge contributions.

Case Study Methodology

Yin (1994) defines a case study as "an empirical enquiry that investigates a contemporary phenomenon within its real-life context and it relies on multiple sources of evidence" (p. 13). Case studies benefit from integrating multiple sources of evidence, including the narrative, where converging lines of inquiry and triangulation can grant confidence to case study findings (Patton, 2008). It is the narrative that is the focus of this article because of its power to engage the reader and get him or her to reflect.

While the ability of a case study to provide a systematic way of collecting data, analyzing information, and reporting results for an in-depth, longitudinal examination of an individual event is beneficial (Yin, 1994), the volume of information collected also makes writing succinct case study summaries difficult (Balbach, 1999). Numerous insight and assertions may convolute the overall recommendation. Balbach (1999) recommends evaluators be brutal editors of their own work, focusing not so much on volume, but in adequately documenting their findings. Often, what is left out is the clear record of methods employed to gather the data and analyze it (Balbach, 1999).

Furthermore, case studies are useful in providing analyses within a context informed by multiple sources of information, representing multiple perspectives (Williams & Hummelbrunner, 2011). In addition to the voices of the program community, stakeholders, and other organizational leaders, there is a need for the evaluator's voice to be included. Relationships are multi-faceted and complex; getting the story from only one perspective brings substantial risk to the credibility of arguments.

Stake (1975) contends tacit knowledge, defined as knowledge gained from experience with interactions as well as experiences from propositions and reflections about them, is more likely to arise from case studies. Tacit knowledge comes in the form of "unexpressible associations which give rise to new meanings" (Stakes, 1975, p. 6). While evaluators have great stores of tacit knowledge, we argue that reflection and narrative are the tools to tap into this supply of knowledge.

Narrative and Evaluation

Many publications in the evaluation literature are devoted to the use of narrative and evaluation (Cousins & Chouinard, 2012; Jewiss & Clark-Keefe, 2007). Moreover, the interest in the use of narratives is not distinct to evaluation, but a trend among social inquiry (Barone, 2001; Costantino & Greene, 2003; Clandinin & Connelly, 2000; Riley & Hawe, 2005).

Narratives are one of the information sources of a case study; they excel in offering flexibility so that theory and practice are still incorporated, but may be less explicit than in a traditional journal article. The narrative storytelling style aids understanding and increases engagement. Narratives are commonly used in community development projects where the creation of a project's meaning is controlled by the project participants, more so than external evaluators (Dixon, 1995). By examining the way a story is told and taking into account the positioning of the narrator, narratives may provide special insights into the complexity of stakeholders and community partners, the sequencing and tension created by the revelation of some events, and the point of view used to make sense of such events (Riley & Hawe, 2005).

Reflection and Evaluation

Adding to the use of narrative is the practice of reflection. The American Evaluation Association's (2004) *Guiding Principles for Evaluators* highlighted the necessities and benefits of reflective practices. More than taking time for reviewing, reflection entails reflexivity where the evaluator is aware of his/her effect on the design, process, and outcomes of evaluations or programs (Guba & Lincoln, 1989). Alvesson and Skoldberg (2010) describe reflexivity as the interpretation of interpretation, which adds another layer of analysis after data interpretation to account for the evaluator's relationship with the data. According to Patton (2014), reflexivity entered the evaluation lexicon by means of emphasizing "deep introspection, political consciousness, cultural awareness and ownership of one's perspective" (p. 242).

Cousins and Chouinard (2012) wrote at length about the merits and gaps of the use of reflective essays. In their review of participatory evaluation practice, 69% of the 121 documents reviewed were reflective essays. This abundance indicates the value of reflective narratives to both the writer and the reader. The writer may benefit from reflecting on strategies used and challenges encountered with the focus put on process rather than product. The reader can benefit from the anecdotal account of insights gained and lessons learned in a way that is traceable and accessible. Since the narratives are usually void of substantial data collection and analysis, but provide more depth and detail on specific evaluation processes, the accounts appeal to a wide and global audience which may not be familiar with the Western empirical tradition (Brandon, 2014).

Further, engaging in a disciplined reflective process can help guide an exploration of subjectivity, monitor against bias, and prevent a variety of ethical and practical dilemmas (Jewiss & Clark-Keefe, 2007). An attractive feature of the reflective practice, particularly *reflection-in-action*, takes place in the moment and de-emphasizes the chronological-physical separation from action. Reflection-in-action prioritizes adjustments, continuous monitoring of responses, and adjusting to one's own share of responsive interaction (Yanow & Tsoukas, 2009). This differs from reflection-on-action where one is reflecting on a past event, stepping back in time to ponder. Reflection-in-action enables evaluators to ponder on the intersection of theory and practice as evaluators take stock of what is or isn't working in the evaluation process, what obstacles were overcome, and what negotiations were made along the way.

Gaps and Needs

Little attention is devoted to how to structure the narrative portion of a case study. Guidelines do exist for how to provide shape and structure to an overall evaluation report. Specifically, six structures are proposed for writing case study reports depending on the different purposes (Yin, 1994). Linear, comparative, chronological and theory building structure work well when the purpose of the case study is to explain, describe, or explore. A suspense structure is best-suited for explanatory case studies and a non-sequential structure is preferred for a descriptive purpose. This structure is advantageous as it helps audiences get comfortable with the presentation of findings. The systematic framework and use of sections, subtopics, and other components allows the reader to focus on the content.

While this framework provides guidelines for reporting case studies, guidelines are missing for writing the narrative portion of a case study. Although a robust narrative on applications of the field is welcome, guidelines are needed to increase structure and foster clarity for writing a reflective case narrative. Current reflective case narratives are loosely organized; the lack of structure and excessive length of many narratives make mining these articles for lessons learned a daunting and muddled task. As Brandon (2014) notes, reflective case narratives often ramble on, offering multiple insights and recommendations, but lacking prioritization and relevance.

In applied disciplines such as education, nursing, and social work the use of narratives are frequently used to describe and understand complex processes and as a way for storytellers to give meaning to their experiences (Nygren & Blom, 2001). A critique to this approach is twofold; first, narratives are at risk of over-interpretation where evaluators may produce superficial self-reflection. Secondly, the issue of voice arises. Reflective case narratives may privilege the voice of the evaluator at the expense of excluding other perspectives such as stakeholders, subject matter experts, and community partners. In this way, reflective case narratives may prioritize the narrator's own meaning making and may not represent all views and voices.

Trust and credibility are the foundation of a reflective case narrative, yet the narratives often do not include a methods section so readers lack the information needed to show the methodological warrant for the study. This omission, according to Cousins and Chouinard (2012), causes the reader to "trust the authors' powers of memory, interpretation, and narration to produce a fair and accurate rendering of the story" (p. 183). Rather than blindly trust, clear guidelines are needed for the reflective case narrative including a succinct overview and a systematic identification of significant conclusions to bolster transparency and confidence (Cousins & Chouinard, 2012; Brandon, 2014). Given the popularity of reflective case narratives, there is critical need to agree upon parameters and standards to improve their effectiveness.

Strategy to Improve the Reflective Case Narrative

Our strategy is to provide guidelines rooted in the tenets of Malcolm Knowles' (1950) adult learning theory principles. As a critical contributor of reorienting adult educators from "educating people" to "helping them learn," his focus on informal education highlights the extent of reflexivity inherent in the reflective case narrative by emphasizing the flexibility of the process, the use of experience, and the commitment of participants (p. 6). Knowles (1984a) posits five assumptions about the characteristics of adult learners which differ from those of child learners: 1) self-concept; 2) adult learner experience; 3) readiness to learn; 4) orientation to learning and 5) motivation to learn. Each of these characteristics will be examined to help understand the basis for what constitutes knowledge, how learning is understood, and how to better value the reflective case narrative.

The premises of adult learning theory can improve the reflective case narrative as a valuable teaching mechanism that promotes knowledge transfer.

Adult Learning Theory

Self-Concept

As people mature, Knowles (1984a) claims their self-concept transitions from being dependent to being self-directed. This shift has implications for how people learn because as a dependent learner, the ability to know something is dependent on there being something to know.

This model for learning resembles a formula where X is something knowable. To know X, you need to learn about it by reading about it, talking to experts in X's discipline, conducting a survey, or some other method to better know X. Once your knowledge base about X expands, you have learned something, where learning represents "the movement from not-knowing to knowing" (Bacon, 2002, p. 36). In this model, knowledge is represented spatially where learning decreases the boundaries of what is unknown, and increases the boundaries of what is known (Bacon, 2002). As Christie and Rose (2003) attest, "evaluators are defined by their knowledge base" (p. 236). For those who identify as experts in the field or as professionals, this traditional model of learning works well as the learning base increases rapidly due to the already large parameters of what is known. In this way, experienced professionals' self-concept is that of knowers.

However, evaluators often identify their self-concept as learners trying to gain knowledge and learn their stakeholders' value (Orr, 2010). The vast amounts of information can be daunting to learn and difficult to apply to a limited knowledge base. In contrast to an enlarging field of knowledge paradigm, an alternate model posits learning can maintain the same parameters, but the depth of a subject can deepen. Real-world problems and applications, connections among strategies, and reflections on lessons learned can facilitate depth on one particular evaluation practice. The breadth versus depth model for learning has relevance to the ways in which we write up findings; traditional journal articles contribute to an ever-widening circle of knowledge while reflective case narratives contribute depth in their synthesis of ideas and insights on problems.

Adult Learning Experience

The ability to learn from past mistakes and to see experience as a wellspring for learning secondarily characterizes the adult learning experience (Knowles, 1950). This characteristic hints at the personal and self-directed nature of adult inquiry. A key element of self-directed learning is the extent of ownership; it is the learner who is not only in control of what is learned, but also “when the learning starts, where it goes and when it’s complete” (Lamdin, 1997, p. 118). Individuals who take the initiative to plan, carry out, and evaluate their own learning experiences benefit from satisfaction stemming from their own self-determination. The learning experience also serves as the foundation on which to develop critical thinking skills, observation, and analysis crucial to the work of evaluation. Through maturity and exposure individuals can build a reservoir of experience that serves as a resource for learning.

One of the dominant resources is other people (Roberson & Merriam, 2005). While the value of stakeholder involvement is uncontested in the evaluation literature, little empirical research is devoted to it as compared to theoretical or applied writings (Fleischer & Christie, 2009; Christie, 2003; Greene, 1988). One way to start addressing this gap is through the reflective case narrative as often the subject matter focuses on the relationships between the evaluator and invested stakeholders, subject matter experts, champions, and other key players; this focus on people as a source of learning is particularly relevant for novice evaluators (see Christie, 2003).

Readiness and Orientation to Learn

Adults manifest a readiness to learn by being more task-oriented and problem-focused (Knowles, 1984a). This priority is manifested in traditional journal articles which place a premium on providing a problem statement and then presenting a rationale for the chosen approach to address the problem. Furthermore, generalizable and reproducible knowledge is valued.

In contrast, learning opportunities oriented to individual knowledge can be beneficial to evaluators. To foster self-direction and initiative in the learning process, Grow (1991/1996) recommends offering opportunities where motivated learners can weave experience into learning and encourages self-evaluation. The chance to reflect on the evaluation and to write the analysis in a narrative not only facilitates individual learning, but also allows learners to direct their learning processes by setting goals for themselves. Situating experience as knowledge is a process that reflects maturity and can bestow confidence and self-efficacy among evaluators (Zimmerman, Bandura & Martinez-Pons, 1992).

Motivation to Learn

The final characteristic of adult learners is they are motivated by intrinsic factors (Knowles, 1984a). According to Ryan and Deci (2000), learners who are intrinsically motivated are more likely to retain what was learned, apply their knowledge more than others, and perceive themselves as more competent. A reflective case narrative appeals to intrinsic motivation as the focus is not on content, but toward connections. In traditional journal articles attention is placed on results where an introduction, literature review, and methods provides a framework to understand the findings. In contrast, a focus on the connections is where a reflective case narrative can excel. Omitting the methods and findings in favor of discussing real-world applications helps meet the personal and professional needs of adult learners by providing meaning and relevance (Speck, 1996).

Applying Knowles' (1984a) characteristics of adult learners to reflective case narratives yields the ability to see the value of the opportunity to reflect and transform experience into knowledge. Through analyzing mistakes, distractions, and unanticipated outcomes, the experience gained from the evaluation process can yield powerful insights and recommendations. In this way, experience provides the basis for learning activities and outcomes. As Speck (1996) notes, the transfer of learning is not automatic; rather, it must be facilitated. The reflective case narrative is the mechanism to coach adults to "transfer learning into daily practice so that it is sustained" (Speck, 1996, p. 36-37).

However, to position experience as knowledge, a tight and unified structure is needed. While learners may be motivated to take what they have learned from others and apply it to their own practice, the challenge is in translating the knowledge. Structure is important to make the knowledge within reach for learners. While the process of transforming experience into knowledge is non-linear and circuitous, the presentation of findings needs to adhere to normative guidelines. A formalized structure in reflective case narratives will ensure those sharing information cover all the necessary bases to help evaluators maximize learning. The following section recommends standard operating guidelines to structure a reflective case narrative.

Suggested Structure of a Reflective Case Narrative

To bridge the learning gap and transform knowledge gained in the process of conducting an evaluation into concrete lessons and learning opportunities we propose structuring the reflective case narrative with five sections. Below are the section heads, rationale for each section, and potential discussion questions.

- Section 1: Background and Context
- Section 2: Motivation and Scope of the Evaluation Strategy

- Section 3: Review of Subjectivity
- Section 4: Evaluation Strategy in Context and Indicators of Success
- Section 5: Lessons Learned

Section 1: Background and Context

To understand the evaluation project evaluators need to share how the project originated. As Scriven (1967) suggests, we first need to define the nature of the evaluand. Rather than focus on why the evaluation was performed or what the objectives were as traditional journal article introductions are written, this introduction's purpose is to explain how the evaluation project came to be and who is involved. So the organizational context can be understood, the program, intervention, policy, or system need to be explained in a clear manner. Identifying the key players and their values highlights the significance placed on organizational relationships and interpersonal communication (Fleischer & Christie, 2009; Roberson & Merriam, 2005). This approach is more likely to meet the correct level of challenge to encourage mastery and self-efficacy in the subject matter. Plus, it reinforces Knowles' (1950) position that people are valuable resources who hold information and experience which can serve as a reservoir for learning.

Additionally, describing the geographic area can depict urban or rural demographics and cultural attitudes that may implicitly influence the evaluation. Similarly, a discussion on data preferences held by the client will shed light on why evaluation design and methods were used. Finally, explaining communication preferences held by the client and communication channels used can have implications on timelines and budgets. For example, the need to acquire technological software may delay deadlines and the implementation of the software may improve or detract communication.

Section 1 Guiding Questions:

- How does the program's mission, or the policy's context, influence the evaluation?
- What are the organizational values of invested stakeholders and how do they impact the evaluation?
- How does the geographic location and cultural climate influence stakeholder standards?
- What are the dominant cultural norms and how are they manifested?
- How do the types of data collected and methods used convey client preferences?
- In what ways did the communication channels affect the evaluation in terms of efficient communication, budget, and timelines?

Section 2: Motivation and Scope of the Evaluation Strategy

The impetus behind the evaluation needs to be explained as understanding the driving force can reveal levels of engagement toward the evaluation process and the extent of cooperation toward the evaluators. For example, if the evaluation is mandated by funders or by law, clients may be negatively positioned toward the evaluation and deem it punitively. If an evaluation is required rather than invited, then clients may misunderstand the focus and assume they are the subject of the evaluation and their job performance is under review. Although some evaluation anxiety is normal, excessive evaluation anxiety (Donaldson, 2007) can cause disruptive behaviors such as blocking evaluators' access to important information, expressions of unwillingness to cooperate with the process, and heated confrontations with evaluators (Bechar & Mero-Jaffe, 2013). Alternatively, if the evaluation derives out of an organization's interest for self-determination, and is more in line with Fetterman's (2005) empowerment evaluation, clients may possess more ownership and be more likely to participate.

Discovering the stimulus behind the motivation for the evaluation appeals to Knowles' (1984b) adult learning characteristic of orientation to learning. By discussing an organization's readiness for evaluation evaluators are analyzing the organization's tendency for self-direction and initiative in the evaluation process. As a result of reflecting on the level of investment in the evaluation process this discussion may help identify criteria for successful partnerships and ideas for engaged community partners.

Moreover, understanding the scope of the evaluation is necessary. Often, journal articles focus on one specific outcome or recommendation, but the larger context is lost. Understanding the size of the evaluation team, levels of experience, the number of people involved in planning the evaluation, the duration of the evaluation process, the travel needed, and the scope of the budget can provide real world data to peer evaluators so they have a sense of the logistics involved in conducting an evaluation. For example, travel may be accounted for by the number of trips taken, the number of miles driven, or the number of days spent in the field. The breakdown of time, money, and resources needed highlights Patton's (2008) value of feasibility and provides perspective if evaluators are thinking of devising a similar evaluation strategy.

Section 2 Guiding Questions:

- How did the underlying impetus for the evaluation influence motivation and cooperation?
- How did the clients' attitude toward evaluation affect their levels of engagement?
- How did the size and years of experience of the evaluation team impact client-team rapport?
- How did the length of the evaluation affect budget and timeline?
- What was the budget and how was it determined?

Section 3: Review of Subjectivity

A prominent section in journal articles is the literature review where evaluators provide a rationale for selecting the particular approach, demonstrate where else and how else this approach has been used, as well as discuss benefits and limitations of the approach. Researching the literature and summarizing similar approaches builds on evaluators' knowledge base and brings awareness of quintessential articles and current trends. However, the gaze is firmly outward. The wide reaching and cumulative scope of the literature review distances the evaluator from the partiality to the work. What is lost is the evaluator's own voice and experience that surface in the course of the evaluation.

Contrasting to this perspective is the practice of turning the lens inward so evaluators are allowed to account for their own subjectivity. A literature review in a reflective case narrative needs to attend to the ownership of one's perspective. Evaluation is characterized as a values-laden enterprise (Scriven, 2003). While evaluators need to understand and support the values of their stakeholders, they also need to acknowledge that their understanding is shaped by their own interpretations of interactions and dialogue (Hall, Ahn, & Greene, 2012). The intersection of the personal and the political, social, and value-oriented nature of evaluation needs to be examined to reveal what underlying assumptions are at work in the evaluation process (Guba & Lincoln, 1989). While prescribing or advocating for particular values may be an implicit tradition in evaluation, this section makes them explicit (Hall, Ahn, & Greene, 2012).

Taking on the social constructivist perspective put forth by Guba and Lincoln (1989) and Patton's (1978) early work, this framework acknowledges the evaluators' responsibility in maintaining a critically self-reflective stance in which to examine personal perspectives and monitor against bias (Jewiss & Clark-Keefe, 2007). As Glesne (2006) maintains, recognizing one's personal perspectives is the first step in producing more trustworthy research.

Given so much of an evaluation is relational, it is important to account for one's own position as a way to lend insight into those relational connections. While the importance of stakeholder involvement is well documented, who they are responding to is often overlooked. Acknowledging the evaluator's demographics alongside the evaluation context described in Section 1 can denote cultural awareness and political consciousness. Our subjectivity accounts for our own presence, both physical and symbolic, and examines how we interact with others in a specific community and as evaluators associated with a professional field and its code of ethics.

For example, an account of our own subjectivity exemplifies how this discussion will play out in a reflective case narrative. Our physical presence consists of white men and women working in a predominately Scandinavian culture in the upper mid-west of the United States. Our communication with stakeholders changed to reflect cultural norms where conversation starts with small talk, largely about the weather, before we discuss evaluation matters. Learning this cultural currency helped us to strengthen our rapport with stakeholders and leverage perceptions that we were “too formal.” Our symbolic presence is associated with our connection to the school of medicine and health sciences within a large research university as well as our contractual ties to the Department of Health as well as our connection to our funder. Our communication is mediated by stakeholders’ perceptions of and experiences with these institutions and we must be aware that our individual interactions represent larger entities. In line with AEA’s Guiding Principles (2004), engaging in reflexivity helps evaluators to be explicit about their own interests and values in the outcomes of the evaluation.

In qualitative research studies, a reflective section which discusses who the researcher is and the lenses through which they view their work is now expected. Evaluators like Jewiss and Clark-Keefe (2007) point out the benefits gained from engaging in this reflective practice as advancing “the cause of cultural competence and respect for diversity” (p. 337). While constraints of time and space limit this type of reflection in traditional journal articles, the reflective case narrative is the vehicle to integrate this reflective practice. We need to inquire into our thinking patterns; the act of self-reflection and self-questioning is essential to developing critical thinking. This in-depth account of reflexivity may help to transition the self-concept of evaluators from learners to knowers as they gain confidence from reflecting on their own contribution and involvement.

Section 3 Guiding Questions:

- What are your demographic characteristics (physical presence)?
- How did these attributes affect the way stakeholders and clients responded to you?
- With what organizations, community partners, and funders are you associated (symbolic presence)? How did these relationships affect interaction with stakeholder and clients?
- What past experiences did you have working with this community, group, organization, or stakeholders and how did they color current interactions?
- What preconceived notions and/or assumptions did you have and how did they influence your perspective on the evaluation?

Section 4: Evaluation Strategy in Context and Indicators of Success

Chelimsky (2007) notes an evaluation is context dependent. The context dictates the appropriate evaluation approach and design. Contextual dimensions such as evaluation questions, timelines, budget, data collection, and analysis influence the evaluation approach. Patton (2008) outlined 20 different common situational factors influencing how an evaluation is designed and conducted. While it is infeasible to address all of the variables or combinations of variables, explaining the way evaluators continually evolved the design as a result of encountering challenges is paramount for those not directly involved in the evaluation to understand the flexibility and contingency of a project. Evaluations are not linear processes, but interactive, adaptable, and responsive (Rogers, 2008). Identifying all of the twists and turns in the evaluation design is a good way to convey the complexity and multi-faceted dimensions of evaluation. The focus here is on process, and emphasizes the innate decision-making ability evaluators must hone. Analyzing how evaluators became aware of problems or when they realized a revision was needed are clear benefits of the act of reflection.

Reflecting on the evaluation strategy in context encourages evaluators to look for signs that pointed to success or disaster. We refer to these signs as indicators and believe that identifying them functions as a meta-analysis of the interworkings of the evaluation process. The inclusion of indicators deserves heightened attention as they are instrumental lessons learned for evaluators. Indicators are different than outcomes as they are often realized in the process of conducting an evaluation, and are not the goal of the evaluation. Rather than focusing on overall implications or recommendations from the evaluation project, indicators serve as measures that show how results were achieved. Identifying indicators can deconstruct the evaluation process and show in a step-by-step fashion how one phase moved into the next phase, how rapport was gained, how leadership was developed, and other key stages. Tangible and concrete, indicators have particular salience for evaluators to examine incremental signs of progress (or warning) within the larger evaluation project.

The meaning of indicators, such as the quality of feedback received, the timeliness of phone calls returned, or the receptiveness of ideas shared, are tacitly understood by experienced evaluators. However, their power in guiding an evaluation is not always apparent to the novice evaluator. Making these indicators explicit can help the learner reflect whether their own evaluations are on track (Johns, 2009). For example, we deconstructed an abstract concept of buy-in and developed five indicators that measure buy-in (Becker et al., 2015). Taking stock of indicators can foster knowledge transfer by unpacking abstract concepts so that novice evaluators can understand and translate into their own practice.

Section 4 Guiding Questions:

- How did the evaluation design change throughout the evaluation process?
- How were decisions made and communicated?

- What signs manifested to indicate the evaluation was on track?
- What signs manifested to indicate a change was needed?
- When did the revisions take place and how were they communicated?
- How did clients, community partners, and stakeholders respond to the modifications?

Section 5: Lessons Learned

A significant contribution to the field are the lessons learned, as they help move evaluation theory and practice forward. Reflective case narratives enable the evaluators to examine lessons learned outside of the contextual demands and redirect attention to professional knowledge. While success stories often inform design choices, so too can lessons learned. A descriptive explanation of failed attempts, how the failures manifested, and how they impacted evaluation outcomes would be helpful along with a discussion on any corrective actions that were taken to remedy the problem. Lessons learned tend to stem from mistakes, but equal attention should be given to good and bad lessons.

Moreover, a discussion of unanticipated obstacles and issues would be valuable. For example, the first author's attempt to assess freshmen composition curriculum failed due to faculty resistance to share syllabi and assignments. Reflecting on my interactions with the faculty, I realized the timing of my site visit coincided with their renewal of contracts. I hadn't anticipated the extent that anxiety would impact participation.

Reflection can also yield candid discussions about mistakes. Without a methods section, validity and reliability of findings cannot be verified, but our trustworthiness is based on our integrity to assess our own dealings and misgivings and admit fault. We need to review the evaluation with a sense of openness and willingness to be teachable.

As lessons are learned and then shared with others, the community of evaluators can benefit from the deliberate act of reflection. The value added from a structured narrative is realized when someone can get the benefit of someone else's experience without directly experiencing it themselves. This is more efficient and ethical than allowing every evaluator to repeat mistakes because s/he needs to experience it personally. It is not that the field of evaluation suffers from a lack of empiricism, but as evidenced by the program evaluation standards (Sanders 1994), there are many common errors that continue to be repeated. The current form of sharing lessons learned is not effective. These suggested guidelines in which to structure the narrative combined with the deliberate act of reflection is a way to start taking steps to better share experiences.

Section 5 Guiding Questions:

- What worked well in the evaluation?
- What went wrong in the evaluation?
- What strategies were used to remedy the problem?
- What aspect of the evaluation was most challenging?
- What unanticipated barriers did you have to overcome?
- What would you do differently?

Conclusion

Understanding the characteristics of adult learning theory helps to better grasp the context and approaches which best facilitate learning. To tap into evaluators' orientation and motivation toward learning as well as to develop their self-concept as knowers, opportunities for accounting of one's own position and engaging in guided reflection are needed. It is important to realize the way reflexivity, the practice of introspection, and synthesis can promote learning and facilitate knowledge transfer. From a teaching aspect, hands-on and applied learning situations are best, but they are costly and logistically tedious to enact. In the absence of hands-on learning simulations, one way to bridge this gap is through structured reflective case narratives. In both the practice of reading others' accounts as well as encouraging writing one's own, the community of evaluators will benefit from being more mindful of their own subjectivity and more attuned to monitoring encroaching assumptions.

While reflective case narratives can excel at providing rich information, caution is needed so that evaluators maintain confidentiality and anonymity of participants. If the description of traits of individuals or groups make them identifiable, deductive disclosure occurs (Tolich, 2004). Describing the background and context of the evaluation, as suggested in Section 1, may pose a risk for producing deductive disclosure if we are not carefully considering our audience when describing participants in our published work. Breaches in confidentiality can impede relationships and harm the public's trust in evaluation. As suggested by Kaiser (2009), heightened awareness is needed regarding the ethics of representation and dissemination when using qualitative data. The focus should be on relationships and influences, not participants. A delicate balance is needed so that our reflections can generate serviceable contributions to the evaluation field, yet still protect the identities of those who participated.

The proposed five sections offer parameters for the increasingly popular reflective case narrative and start the conversation on its structure. With these sections outlined, the reflective case narrative gains credibility as a resource for knowledge transfer, sharing of ideas, and keeping an eye on the dynamic and fluid process of evaluation. The proposed structure can motivate evaluators to learn from others and translate experience into knowledge. As this style of writing advances the field, it is important to have some agreed upon guidelines to create some unity and standards.

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