

**Exploring Problem-Solving Preferences, Expressed Identity, Identity Integration, and
Coping Behavior of Evalpreneurs in the United States: A Phenomenography Study**

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Nicolas Uwitonze

Academic Abstract

Evaluation and entrepreneurship are two transdisciplinary fields that form the emerging field of “evalpreneurship.” At this intersection are evalpreneurs—professionals who not only lead and conduct evaluations but also manage evaluation consulting businesses, whether for-profit or nonprofit. Across the United States, a growing number of independent evaluation consultants have established businesses serving a wide range of clients, often involving collaboration with others. While evalpreneurs are gaining prominence, little research examines how their problem-solving styles intersect with other aspects of their expressed identities within their evaluation consulting work. Exploring this integration is crucial for understanding the underlying factors that shape their decision-making, leadership, and collaboration. To address this gap, this study employed a qualitative research design, informed by quantitative survey data and descriptive analysis of KAI scores. Grounded in a conceptual Organismic Social-Behavioral Perspective (OSBP) conceptual framework, and phenomenography, the study explored similarity and difference in expressed identity, identity integration, and coping behavior among adaptive and innovative evalpreneurs. Findings indicate that evalpreneurs perceive their problem-solving style as a defining aspect of their professional identity, influencing how they behave (solve problems). Participants described evidence of coping behavior and how their identities are expressed and integrated. This study provides new insight into the lived experiences of evalpreneurs, offering implications for evaluation practice, leadership, and professional development. Data from this study provides information to better inform problem-solving skills and coping practices and includes recommendations for future research.

Exploring Problem-Solving Preferences, Expressed Identity, Identity Integration, and Coping Behavior of Evalpreneurs in the United States: A Phenomenography Study

Nicolas Uwitonze

General Audience

Evaluation and entrepreneurship are two fields that are coming together to create a new area of work known as "evalpreneurship." Evalpreneurs are professionals who not only conduct evaluations but also run their own consulting businesses in the evaluation field, whether for-profit or nonprofit. Across the United States, many independent evaluation consultants are building businesses that serve a variety of clients and often require collaboration with others. Despite their growing presence, there has been little research into how these evalpreneurs navigate their professional identities alongside their personal and social identities. In particular, there is limited understanding of how their problem-solving styles—whether they are more adaptive (enabled by established procedures) or more innovative (seeking different ways of doing things)—interact with their other identities. This study seeks to fill this gap by examining how evalpreneurs experience and manage their identities, problem-solving behaviors, and coping strategies within their work environments. The study looked at the experiences of evalpreneurs and identified patterns in how those with different problem-solving styles express and integrate their identities. The findings show that evalpreneurs view their problem-solving style as a key part of their professional identity. This influences how they approach challenges, make decisions, and work with others. The study also sheds light on how evalpreneurs adapt their behaviors to meet the needs of clients, teams, and organizations. These insights are valuable for improving evaluation practices, supporting professional development, and enhancing leadership within the field. The study also offers recommendations for future research.

Dedication

This work is dedicated to all who have supported, encouraged, and motivated me along this entrepreneurial dissertation journey, especially to...

~ my wife, Emma U., who labored with me and never ceased to pray, encourage and care for me and our two children.

~ my son Elijah U. who is one year old and daughter Berachah U. who is three years old. They are my amazing source of inspiration. Sometimes, you had to study with Daddy in your entertainment, especially when we did not have TV or tablet for you to watch from, we could share my laptop. I can't forget whenever I get home and I am welcomed by your hugs, and I feel joy, peace and love.

~ my future biological and spiritual children, may this be a source of inspiration, that 'If Jesus Christ says Yes, nobody can say No and with Him, nothing is impossible'. With faith, goal setting, determination and resiliency, dreams become a reality.

To all of you, where I found difficult in attaining, you will not struggle. The path has been cleared for you. Your Father's achievement is your achievement too. I believe in you, you will do well and greater than I did.

To all of us, this achievement is an important step in the "Dreams2Destiny (D2D)".

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Chapter One

Introduction

This is the first chapter of a five-chapter dissertation. It introduces the study by outlining its background and context while presenting the problem that motivated the research. The chapter also clarifies the study's purpose and significance and discusses key assumptions, limitations, and definitions of important terms.

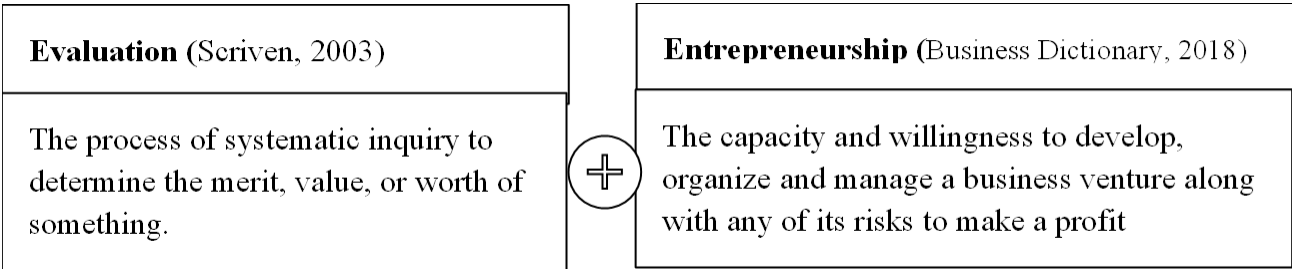
For many years working with farmers as an extensionist (change agent), I always thought farmers could be placed among businesspersons or agripreneurs who operate their farming business, however small it may seem. This idea was echoed by Pozen (2008), who noted that “we are all entrepreneurs” (p.1). Pozen (2008) suggested that there are entrepreneurs across every sector of our society, be it among philanthropists, policymakers (policy entrepreneurs), information technology and digital technology (IT or digital entrepreneurs). Similarly, Goldsmith (2010) suggested that agents of change in social innovation and community change are “civic entrepreneurs” while those in nonprofits or for-profit endeavors with a social mission are social entrepreneurs. The list could go on, but some entrepreneurs are more widely known and referred to in literature than others. For instance, agripreneur is a recognized term among research and projects focusing on agriculture extension and youth engagement agriculture (Franzel et al., 2020). However, this is not the case with evaluation -a transdisciplinary field (Scriven, 2003).

From this background, this dissertation focuses on a relatively underexplored groups in the evaluation field and industry-entrepreneurs known as “evaluation entrepreneurs” or “evalpreneurs” (Sabarre, 2021). The term *evalpreneur*, referring to leaders in the evaluation business, was first introduced by Dr. Nina Sabarre in her dissertation at Claremont Graduate

University in 2021. Her study was the first to examine the role of entrepreneurship within the U.S. evaluation marketplace and to introduce the concept of *evalpreneurship* into scientific literature (Sabarre, 2021). As the name suggests, Sabarre (2021) defined evalpreneurship as a fusion of two distinct trans-disciplines: evaluation (Scriven, 2003) and entrepreneurship (Business Dictionary, 2018) (Figure 1). Combining these two definitions, Sabarre (2021) defined evalpreneurship as: “the capacity and willingness to develop, organize, manage, and assume the risk of a business that sells products and services related to the process of systematic inquiry to determine the merit, value, or worth of something” (p.7).

Figure 1

The fusion of two trans-disciplines: evaluation and entrepreneurship



This definition of evalpreneurship shows that evalpreneurs have capacity beyond conducting and leading evaluations; they have a willingness to operate a business and the emotional strength to take on business-related risks (Sabarre, 2021). According to Sabarre (2021), a key difference between independent evaluation consultants and evalpreneurs is that evalpreneurs operate a formal evaluation business, registered under the structure of a profit or nonprofit organization. They are leaders of evaluation-focused organizations, often functioning as owners, co-owners, founders, co-founders, Chief Executive Officers, Chief Operations Officers, firm directors, executive directors, principals, managing partners, or business partners (Sabarre, 2021).

Contextual Background

Understanding Problem A and Problem B

The field of program evaluation focuses on assessing the impact and performance of programs, policies, and interventions (Mertens & Wilson, 2018). In real-world practice, evaluation involves more than dealing with data or applying evaluation methods and approaches. It also requires managing the complex human and team dynamics that influence the outcome of the evaluation process. These complexities are more evident in team-based problem-solving when individuals collaborate to solve a problem (Kirton, 2011). According to Kirton (2011), these problem-solvers often encounter two interconnected problems: Problem A and Problem B. Problem A refers to the primary task or objective that the team is working to address, while Problem B involves the management of interpersonal and team dynamics that emerge during collaboration (Anderson, 2023). These dynamics can include disagreements, differing work styles, and conflicting approaches to problem-solving. However, Problem B also encompasses additional challenges, such as resource constraints, misaligned priorities, unclear expectations, gaps in motivation, and differences in ability (Uwitonze & Friedel, 2024). These interpersonal and team-related issues can hinder progress and divert attention from solving Problem A.

To understand Problem A and Problem B in the context of evaluation consulting, I will consider a scenario where an evalpreneur and their team of evaluation consultants are contracted by a nonprofit organization to measure the impact of a community-based health project. This primary task may require the evalpreneur and team to “study problems; collect, review, analyze, and synthesize information; and recommend solutions to managers based on the evaluation team’s findings” (Barrington, 2011, p. 8). In this scenario, the NGO’s main challenge (Problem A) is to get an impact evaluation report from the evaluators while the primary technical problem,

or Problem A for the evaluation consulting team is the specific challenge of evaluating the project using appropriate methods and producing a report. In solving the problem(s), collaborative relationships will be important among the collaborating evaluation consultants (Maack & Upton, 2006). Various other stakeholders may collaborate, including an internal team (staff members), partners and subcontracted consultants, and/or community stakeholders in this case of participatory evaluations (Fetterman et al., 2017; O'Sullivan, 2012;). This collaboration is typical because solving complex problems, like evaluating health programs, often requires drawing on diverse perspectives, skills, and experiences that extend beyond individual expertise (Friedel & Hatala, 2010). Friedel and Hatala (2010) further highlight how entrepreneurs use social capital—the relationships and resources within their networks—to solve complex problems.

In this context, the evalpreneur leads the problem-solving process and manages the team to address Problem A; however, managing collaboration within a diverse team can give rise to Problem B—challenges related to managing cognitive diversity of the team (Friedel, 2014). According to Friedel (2014), such diversity may be caused by differences in problem-solving approaches, motive, intelligence, attitudes, skills, and experiences (Friedel, 2014). In the context of evaluation, Problem Bs may also be caused by the challenges that arise within the team, including differing work styles, disagreements over methodology, unclear expectations, and disparities in expertise or organizational culture (Uwitonze & Friedel, 2024). Although cognitive differences often lead to internal conflicts or misalignments, distracting the team from effectively addressing Problem A (Friedel & Hatala, 2010; Friedel, 2014), such differences are common in most teams, whether in evaluation consulting or other fields. It is from this background that this study assumes that evalpreneurs are problem-solving leaders who manage Problem A and Problem B in teams and collaborative relationships.

Problem-solving Styles and Evalpreneurs

At the core of any evaluation business lies the design and delivery of evaluation products and services (Sabarre, 2021). However, these outputs are the result of a far more complex and often underexplored process: problem-solving (Kirton, 2011). Evalpreneurs, like other entrepreneurs, engage in problem-solving to bridge the gap between where their business is and desired outcomes (Friedel & Hatala, 2010). Although problem-solving is fundamental to their work, it has received limited attention in the evaluation literature. It was British psychologist Dr. Michael Kirton who made foundational contributions to this area. Kirton's first formal study leading to discovery of Adaption-Innovation (A-I) theory was titled *Management Initiative*, in 1961. Kirton's (2011) discovery laid the groundwork for understanding how individuals approach complexity and change through different problem-solving styles, ranging from strongly adaptive to strongly innovative.

Kirton (2011) defines problem-solving style as the “strategic, stable, characteristic, preferred way in which people respond to and seek to bring about change” (p. 66). These styles are assessed using the Kirton Adaption-Innovation Inventory (KAI), a psychometric tool that places individuals on a continuum from “more adaptive” to “more innovative” (Friedel, 2014). According to Friedel (2014), one's problem-solving style is not linked to skill level, experience, status, motivation, culture, ethnicity, or age. As Sabarre (2021) hypothesized that evalpreneurs are catalysts for change and can disrupt the "business as usual" in the evaluation marketplace, exploring their problem-solving styles may reveal whether they approach change innovatively or adaptively. In managing change, more adaptive individuals tend to prefer structured environments and methodical approaches, focusing on incremental improvements to existing systems (Friedel, 2014). In contrast, more innovative individuals thrive in less structured

contexts, preferring radical changes and exploring diverse perspectives to transform current systems (Friedel, 2014).

For evalpreneurs, recognizing their own problem-solving style, as well as those of their team members, is crucial. This self-awareness enables evalpreneurs to navigate potential conflicts and leverage cognitive diversity to effectively address challenges (Anderson, 2023). Understanding these differences can enhance team collaboration by aligning individuals with tasks that match their problem-solving preferences, creating an environment where diverse approaches contribute to the successful resolution of Problem A. Despite the value of these distinctions, no studies have specifically examined the problem-solving styles of evalpreneurs. As a result, the average KAI score of evalpreneurs in the United States remains unknown, highlighting a gap in literature and a potential area for further exploration.

Behavior of Evalpreneurs

Kirton (2011) posits that individuals typically prefer to operate within their natural preferred problem-solving style, either being more adaptive or more innovative. This preference, alongside one's beliefs, attitudes, traits, and habits, contributes to the broader construct of personality (Kirton, 2011). However, individuals do not always behave strictly to their preferred cognitive style; observed behavior includes both preferred behavior and coping behavior (Anderson et al., 2018). Coping behavior refers to the intentional effort to function outside of one's problem-solving style to meet situational demands, either to solve a problem requiring one to operate more adaptively or more innovatively than one's preference (Kirton, 2011). Although limited research has explored coping behavior in depth, existing literature suggests that an

individual's problem-solving style is often expressed and perceived through observable behaviors (Anderson et al., 2018).

In a recent pilot study (Uwitonze, Friedel, & Archibald, 2025), evalpreneurs reported that while some evaluation consulting tasks align with their preferred problem-solving style, others necessitate coping behavior. For instance, tasks such as project management, data analysis, financial tracking, administrative responsibilities, and managing day-to-day project details are generally more congruent with the preferences of adaptive evalpreneurs, who favor structure, attention to detail, and incremental change (Uwitonze, Friedel, & Archibald, 2025). These same tasks may require significant coping effort from more innovative evalpreneurs, whose preference for unstructured, big-picture thinking often clashes with such routine-oriented responsibilities. Conversely, innovative evalpreneurs may find greater alignment with tasks such as business development, branding, marketing, and broad strategic planning activities. For more adaptive evalpreneurs, however, these tasks may involve greater cognitive strain and necessitate coping, as they typically prefer clarity, consistency, and established processes (Uwitonze, Friedel, & Archibald, 2025). Although no studies have specifically focused on evalpreneurs, literature suggests that problem-solving style plays a critical role in shaping how individuals navigate business tasks, adapt to changing demands, collaborate with others, and lead within the evolving landscape of evaluation consulting.

Capacity of Evalpreneurs.

Sabarre's (2021) definition further reveals that evalpreneurs have "expertise beyond conducting and leading evaluations, such as the capacity, willingness, and personal characteristics needed to assume the financial and personal risks related to business development

and sustainability” (p. 7). The understanding of capacity, willingness or motive, and personal characteristics could be explored by referring to the cognitive function of the brain (Kirton, 2011). According to Kirton (2011), capacity, also known as “cognitive level,” refers to an individual's inherent potential capacity (such as levels of creativity, intelligence, or talent) and manifest capacity (such as technical competence or managerial skill) (Kirton, 2011). Skills relevant to evalpreneurs encompass but are not limited to, business, entrepreneurial, and consulting expertise (Barrington, 2011). Although not detailed in evaluation literature, improved capacity of evalpreneurs may include higher-level abilities such as creativity, innovation, leadership, problem-solving, teamwork, and interpersonal skills (Puccio et al., 2018; Sheffield, 2019). These skills, along with specific knowledge and technical competencies in evaluation, can be developed through learning, training, and lived experiences (Anderson, 2023).

The willingness of evalpreneurs to run an evaluation business signifies that they have a personal driving force or motive. This motive directs their energy toward a specific goal with the intensity and duration needed to solve problems (Jablokow et al., 2010). According to Sabarre (2021), some evalpreneurs are motivated to solve complex problems, as one female evalpreneur with a background in STEM and research noted that “evalpreneurship was really a space that I felt like I could help solve some of the world's complex problems” (p. 65). This motive is the fundamental process that allows the evalpreneur to filter through various potential problems (opportunities) and select which ones to pursue, as well as the order in which to solve them.

Expressed Identity

The concept of identity has long been a central theme in literature, reflecting its critical role in shaping individuals' sense of self and their interactions with their environment. One of the

more recent contributions to this body of work is the concept of *Expressed Identity* (EI), which is the “I am” aspect of an individual that one chooses to express (express identity), and how one chooses to be perceived by others in the social environment (Anderson et al., 2018). As will be discussed further in the literature review section, as part of the expressed identity in the Organismic Social-Behavioral Perspective (OSBP) conceptual framework, Kirton’s cognitive Function Schema provides cognitive factors influencing the expressed identity. These cognitive identity factors include the “what I know” (cognitive resource), the “what I want” (cognitive affect), the “In what way I plan” (cognitive style), and the “At what level I plan” (cognitive level) (Kirton, 2011). These factors influence how individuals express their identity, such as attitudes, beliefs, motives, capacity, knowledge, skills, and aptitudes (Anderson et al., 2018). These factors may also influence how people behave, teamwork, and group dynamics (Anderson, 2023).

Social Identity

Another important concept is “social identity,” supported by a theory introduced by Tajfel (1981), which asserts that an individual’s self-concept is shaped by their membership in various social groups, referred to as “social identities.” These identities are influenced by socio-demographic factors such as motivations, age, occupation, class, race, religion, gender, ethnicity, membership in professional associations, team membership (Duening & Metzger, 2017; Radu-Lefebvre et al., 2021). This study assumes that evalpreneurs’ identity is influenced by social identity factors. These identities are fundamental to understanding diversity, which involves the inclusion of different social identities within a group or collective (Cheng et al., 2008). Cheng et al. (2008) argue that individuals possess multiple social identities, each tied to significant social

groups, and these identities collectively shape how individuals perceive themselves and interact with others.

Identity Integration

Building on the above understanding, the concept of “identity integration,” which draws from Erikson’s (1968) theory of lifespan development, suggests a process of bringing together the diverse aspects of the self and sometimes conflicting aspects into a unified whole. According to Cheng et al. (2008), identity integration (II) is a concept that measures the degree to which two or more identities are seen as either compatible or in conflict with each other. Cheng et al. (2008) argue that individuals with high identity integration see their identities as compatible and easily identify with both, while those with low identity integration experience tension and prefer to keep their identities separate. It is from this background that this study explores expressed identity and identity integration of evalpreneurs.

Problem Statement

Evalpreneurship is an emerging field at the intersection of evaluation and entrepreneurship, drawing on principles from both domains to form a distinct academic and professional identity (Sabarre, 2021). Evalpreneurs are individuals who not only conduct evaluations but also manage evaluation consulting businesses—balancing the dual roles of evaluator and entrepreneur. As Sabarre (2021) notes, this field holds transformative potential: Evalpreneurs are positioned to challenge traditional paradigms in the marketplace, including systems of power and dominance such as white supremacy (Shalwani & Dossa, 2023). However, while much attention has been given to what evalpreneurs do—producing evaluations and running

businesses—less is known about *how* they operate cognitively as problem-solvers and change agents.

According to Kirton's A-I theory, all individuals engage in problem-solving, but their approach differs depending on whether they are more adaptive or more innovative (Kirton, 2011). Adaptive individuals prefer more structure, incremental change, and improvements to existing systems, while innovative individuals prefer less structure, radical change, and to disrupt existing systems (Friedel, 2014). This theory is especially relevant to entrepreneurs, who are often assumed to be inherently innovative (Buttner & Gryskiewicz, 1993). Yet, empirical research challenges this assumption. In a study of Italian entrepreneurs, Previde and Kirton (2021) found that many business founders were more adaptive or mid-range in their problem-solving styles, illustrating that innovation and entrepreneurship are not synonymous. Despite these insights, there remains a significant gap in understanding the problem-solving styles of the entrepreneurs (Buttner & Gryskiewicz, 1993), particularly the evalpreneurs, whether they are adaptive or innovative. Literature further highlights a need to understand how these preferences influence their behavior and their expressed identity (Anderson et al., 2018). This gap is especially notable given that the evaluation field places unique demands on consultants, such as navigating complex client relationships and managing data-driven deliverables that may be inherently easy for the more adaptive problem-solving styles.

Three specific research gaps motivate this study. First, literature suggests that problem-solving style is a hidden aspect of identity—that influences how individuals behave, make decisions, and collaborate in teams (Anderson, 2021, 2023). Yet, little is known about how evalpreneurs' problem-solving styles influence their day-to-day consulting practices, behaviors, and decision-making (Buttner & Gryskiewicz, 1993). As Buttner and Gryskiewicz (1993) further

suggested, coping behavior, defined as intentional behavior outside one's preferred style, should be studied in entrepreneurial contexts as in other fields like evaluation. As Friedel (2014) further noted, there is limited research on coping behavior and the management of cognitive diversity, particularly in how the gap between problem-solving style and behavior is addressed. Hence, how evalpreneurs manage this gap between style and behavior remains largely unexplored.

Second, there is growing interest in how problem-solving styles influence collaboration and team dynamics (Anderson, 2023). Anderson (2023) found that problem-solving style plays a critical role in how individuals work with others, particularly in team settings. Since many evalpreneurs collaborate with other consultants (Maack & Upton, 2006; Sabarre, 2021), understanding how style differences influence team dynamics and collaborative relationships remains a research gap as research on this topic is limited. The third research gap concerns the integration of problem-solving style with other forms of expressed identity (Anderson et al., 2018). Cheng et al. (2008) examined the role of identity and diversity by asking, "How does diversity affect individuals and the groups in which they are embedded?" (p. 1). Their work focused on the concept of Identity Integration (II), which refers to the perceived compatibility of multiple identities (Cheng et al., 2008). High identity integration occurs when two or more identities are easily combined or seen as complementary, while low identity integration reflects difficulty or conflict in reconciling different identities (Syed & McLean, 2016). However, little is known about how evalpreneurs experience the integration of multiple expressed identities in practice. Do they perceive alignment or tension between their problem-solving style and other expressed identity? This question remains largely unexplored; hence it is a focus of this study. Understanding this integration is vital, as it can enhance leadership effectiveness, foster

innovation in the evaluation field, and help create "identity workspaces" that support the professional growth of young and emerging evaluation professionals (Bennani et al., 2021).

Significance of Study

Evalpreneurs are not just evaluation practitioners, they are entrepreneurial market actors who actively influence how evaluation is defined, commissioned, and applied. Their business decisions, client engagement strategies, and organizational models shape not only what evaluation looks like, but also how it is valued and used in different sectors. As noted by Sabarre (2021), evalpreneurs directly impact both the supply and demand for evaluation services, positioning them as agents of change in the field's ongoing evolution. As Sabarre (2021) further noted, evalpreneurs have the agency to reshape the scope, purpose, and delivery of evaluation, influencing not just its technical and methodological aspects, but also its cultural and systemic dimensions, including how it is framed, who it serves, and how it adapts to changing external conditions.

This study focuses on understanding the stable cognitive styles that guide how evalpreneurs approach creativity, solve problems, and drive change as agents of change. As Kirton (2011) suggested, distinguishing between adaptive and innovative problem-solving styles provides valuable insight into how evalpreneurs lead, collaborate, and navigate uncertainty, adapting to the changing organizational, socio-political, and global business environment. Adaptive evalpreneurs prioritize stability, structured processes, and incremental change, thriving in environments that value predictability. In contrast, innovative evalpreneurs embrace ambiguity, experimentation, and system-level transformation, often driving bold, disruptive change. These styles can influence our understanding of how evalpreneurs respond to market disruptions, design services, and interact with clients.

This study offers meaningful implications for evaluator training, leadership development, and team formation by highlighting the importance of balancing adaptive and innovative problem-solving styles, particularly in leadership. As evaluators and other professionals increasingly confront complexity and uncertainty, many lack the necessary skills in creativity, coping, and problem-solving (Barrington, 2011; Sheffield, 2019). While this study does not aim to close that skills gap entirely, it introduces the KAI inventory as a useful tool for improving self-awareness and guiding the development of these essential skills. In team formation, KAI can help leaders build cognitively diverse teams and manage those differences more intentionally. As Sabarre (2021) emphasized, diversity in thinking strengthens internal operations and contributes to sustainability. In her study, Sabarre (2021) included a quote from an evalpreneur who shared: “It can’t ever be about me because it’s not sustainable that way... I want a diverse team with different strengths and ideas—people who challenge me. That helps my business thrive” (p. 68). For evalpreneurs, this study emphasizes the importance of cognitive diversity to effectively nurture and sustain their teams, especially in solving Problem A and Problem B. Embracing the complementary strengths of adaptive and innovative styles equips leaders to build resilient, collaborative teams and foster more stress-free evaluation workplaces.

As literature has shown, management of such diversity may incur substantial costs, since the cost of working away from one’s preferred style increases as the intensity (distance from one’s preferred style) and duration increase during coping behavior (Samms & Friedel, 2013). Evalpreneurs may employ a variety of coping and identity integration approaches, often defying simple categorization into adaptive or innovative styles. Understanding these strategies provides key insights into: (a) the emotional and cognitive challenges evaluators face, (b) the hidden labor and cognitive diversity that influence evaluation leadership, and (c) how evaluation practices

either adapt to or resist change in times of uncertainty. In the marketplace, the study will help understand how evalpreneurs may behave according to their problem-solving styles (preferred behavior) or outside their preferred styles (coping behavior) as they are presented with shifts in the evaluation supply and demand or budget cuts like we are experiencing right now in the United States and across the globe due to USAID funding cuts to international development. For instance, in the current shifts within the evaluation consulting landscape, adaptive people may feel uncomfortable because they need clear instructions and structure, while innovative people may thrive in ambiguity, taking the initiative and generating new ideas to navigate through this problem. The findings on coping behavior may reveal why some evalpreneurs thrive in certain environments while others may experience stress, frustration, burnout, or disengagement (Friedel, 2014). These findings may offer critical implications for improving both organizational practices and the broader evaluation field's adaptability in times of change.

Given the individual differences in how people express and integrate their multiple identities (Cheng et al., 2008), this phenomenographic study provides fresh perspectives on how adaptive and innovative evalpreneurs integrate their multiple identities. This study focuses on expressed identity (Anderson et al., 2018), and identity integration is quite new to the field of evaluation and evalpreneurship. In evalpreneurship, where individuals often navigate overlapping roles as evaluators, entrepreneurs, consultants, and leaders, there are many other unknown aspects of their identity that this study will reveal. This study will further provide information on the various expressed identities and practical experiences of identity integration among adaptive and innovative evalpreneurs, which will contribute to the field and scholarship on identity integration. Finally, this is a pioneering study of expressed identity and identity

integration in evalpreneurship, it provides the foundation for future studies and will offer a reflective practice for the evalpreneurs.

Purpose and Research Questions

The purpose of this research was to employ a cognitive lens, informed by Kirton's A-I theory (Kirton, 2011), to explore the expressed identity, coping behavior, and identity integration among U.S.-based evalpreneurs with adaptive and innovative problem-solving styles. Guided by the Organismic Social Behavior Perspective (OSBP) as a conceptual framework, this study will explore the evalpreneurs' narratives of their lived experiences in relationship to coping behavior, problem-solving styles and other expressed identities as well as how identity integration is experienced throughout introspection, interpretation, and interaction with others in teams and collaborative relationships.

This qualitative study, informed by descriptive quantitative data including KAI scores and demographic survey data analyzed descriptively, was grounded in phenomenography (Rolls, 2023). This methodological approach aimed to explore the collective lived experiences, similarities, and differences in the way adaptive and innovative evalpreneurs experience coping behavior, express their multiple identities, and integrate the expressed identities when working in teams and other collaborative relationships in evaluation consulting.

The intended outcome of this research was to fill a gap in the existing literature by deepening the understanding of how evalpreneurs, as agents of change, approach problem-solving and experience coping behavior in various situations when operating their evaluation consulting business. This study further intended to highlight the unique experiences of evalpreneurs as they

express multiple identities and integrate those identities when working with teams or other collaborative relationships. The research questions guiding this study were framed as follows:

- 1) What are the problem-solving styles and identity factors of evalpreneurs?
- 2) How do the more adaptive and innovative evalpreneurs integrate their identities, especially in teamwork and group dynamics?
- 3) How are coping behavior evidenced among the more adaptive and more innovative evalpreneurs comparatively?

Assumptions

This study was guided by three a priori assumptions, supported by existing literature and aligned with the research questions, which provided the foundational framework for the research. Similarly, the data collection protocols will be developed in line with these assumptions. The assumptions underpinning this study are as follows:

- (1) Identity is fundamentally concerned with the question: "How do I think, who am I?" (Kirton, 2011). To explore an evalpreneur's identity, it is essential to consider Kirton's Adaption-Innovation (A-I) theory, which is a well-established problem-solving framework (Friedel, 2023). According to A-I theory, an individual's problem-solving style, measured by the Kirton Adaption-Innovation (KAI) inventory, represents a hidden aspect of their identity (Anderson, 2021). This study assumes that evalpreneurs' identity can be better understood by examining their problem-solving preferences, either adaptive or innovative (Kirton, 2011). This can reveal the relationship between the "I am" aspect of identity (how an individual views themselves) and how they choose to be perceived in social contexts (Anderson et al.,

- 2018). By identifying whether evalpreneurs lean toward an adaptive or innovative style, this study aimed to provide insights into the dynamics of their professional identity and how they navigate the field of evalpreneurship.
- (2) According to Anderson et al. (2018), observed behavior aligns with evalpreneurs' preferred problem-solving style, referred to as "preferred behavior," or they may engage in coping behavior when adapting to circumstances or collaborating with others. Coping behavior occurs when individuals behave in ways that are not congruent with their preferred style, either by acting more adaptively or more innovatively than they typically would. This study assumes that evalpreneurs may exhibit behavior that aligns with their preferred problem-solving style (referred to as "preferred behavior") or engage in coping behavior when adapting to social or professional demands (Kirton, 2011; Friedel, 2014).
- (3) The study assumes that evalpreneurs' identities are influenced by a combination of personal experiences, shared roles, and social identities within their evaluation-focused organizations and professional associations (Anderson, 2023). Evalpreneurs' self-image, group identity, and social behavior are shaped by both internal personal factors and external environmental influences. Socio-demographic factors, including gender, ethnicity, age, occupation, class, and physical attributes, play a significant role in shaping the social identity of evalpreneurs (Duening & Metzger, 2017; Radu-Lefebvre et al., 2021). These social identity factors can affect how evalpreneurs approach their work, their interactions with clients and stakeholders, and how they navigate challenges within the evaluation field. This study assumed that social identity factors, alongside personal motivations and experiences, significantly

influence evalpreneurs' identity formation, behavior, and identity integration in the context of their evaluation business (es).

Limitations of the Study

This study employs a qualitative research design, informed by descriptive quantitative data. While every effort will be made to ensure the reliability and accurate interpretation of the data, certain limitations may arise. The researcher's identity as an African man, with English as my third language, an aspiring evalpreneur, and a KAI practitioner, may introduce biases in data interpretation. Furthermore, since the data is self-reported, there are no additional resources for verifying its accuracy. Additionally, this study involves a small sample of participants from the evalpreneurship field within the United States, which is predominantly white and female (Sabarre, 2021). The study employs a phenomenography approach that will focus on making a comparison of the expressed identity, behavior, and social identity among the innovative and adaptive evalpreneurs, as measured by KAI. Low response to KAI or not having a balanced group of adaptive-innovative evalpreneurs may impact the study negatively. Although this study focuses on problem-solving theory, process, and styles of evalpreneurs, the development of problem-solving skills falls outside the scope of this study.

Definition of key terms

- *Adaption*: A problem-solving style of an individual who, when confronted with a problem, turn to conventional rules, practices, and perceptions of the group to which they belong and drive their ideas toward solutions from these established procedures (Kirton, 2011)

- *Behavior*: A person's characteristic actions influenced by cognitive function (Kirton, 2011).
- *Cognitive Affect*: ("I want") comprises needs, values, attitudes, and beliefs all of which are associated with motive (Kirton, 2011; Simpson, 2019).
- *Cognitive Effect*: comprises problem-solving style and potential level, to which the problem-solving process serves as the description of the operation to implementation, as in "I plan" (KAI Foundation, 2022, p.22).
- *Cognitive Function*: It is the Problem-solving department in the brain that includes the elements of expressed identity, such as what I know (cognitive resource), what I want (cognitive affect), In what way I plan (cognitive style), At what level I plan (cognitive level) (Kirton, 2011).
- *Cognitive Gap*: The gap in problem solving style (as well as in level, motive, attitude, etc.) between problem solvers and the problem, or between the problem solvers themselves, which needs to be resolved alone or in teams (Kirton, 2011). In this dissertation, cognitive gap is typically referring to a gap of problem-solving style.
- *Cognitive Level*: (or Capacity-"how much") or to be more precise is a cognitive potential capacity that may be expressed as a score of Intelligent Quotient (I.Q), level of creativity, talent or level of cognitive complexity (KAI Foundation, 2022).
- *Cognitive Process*: The description of the operation, through a series of steps, represented in "how I operate" (KAI Foundation, 2022).
- *Cognitive Resource*: ("I know") is the life-store of learned information- knowledge, skills, specific competencies, talents, and other experiences, which improves the individual's manifest capacity (Kirton, 2011; KAI Foundation, 2022)

- *Cognitive Style (used synonymously with problem-solving style)*: is the preferred style (in what manner) with which the individual undertakes problem solving (and creativity), either more adaptively or more innovatively (Kirton, 2011)
- *Collaborative Identity*: Refers to the aspects of an individual's identity that are visible and recognized both by themselves and others, shaped by their interactions within social contexts and systems (Fish & Priest, 2011).
- *Coping Behavior*: A learned skillset to behave more adaptively or more innovatively in style that is outside one's preferred problem-solving style (Kirton, 2011).
- *Creativity*: the generation and resolution of novelty to solve a problem (Kirton, 2011; KAI Foundation, 2022)
- *Environment*: is a term that includes culture and climate- "My World" or "Reality as I Perceive It", the social environment and perceptions of it (Kirton, 2011).
- *Environmental feedback (EF)*: is "how I am perceived by others" aspect of an individual (Anderson et al., 2018).
- *Expressed Identity (EI)*: represents an individual's "I am" aspect, reflecting their positionality in a given context, and involves cognitive elements such as attitudes, beliefs, knowledge, preferences, and aptitudes that they choose to express (Anderson et al., 2018)
- *Identity Integration (II)*: describes how easily or difficultly individuals perceive two or more of their expressed identities—are either compatible or easy to integrate (high II) or incompatible, in conflict or harder to integrate (low II) (Cheng et al., 2008)
- *Introspection*: or self-analysis is the internal reflection through which individuals assess the alignment between their identities, goals, and actions (Anderson et al., 2018).

- *Interpretation*: the process by which individuals assign meaning to their identities based on perceived social and professional value (Anderson et al., 2018).
- *Interaction*: the ongoing negotiations between individuals and their external contexts, capturing the aspect of social identity and group dynamics in teamwork and collaborative interactions (Anderson et al., 2018).
- *Innovation*: A problem-solving style of an individual who, when confronted with a problem, attempts to reorganize or restructure the problem and approach it in a different perspective, free from any of the customary perceptions that would be the conventional starting point for its solution (Kirton, 2011).
- *Observed Behavior (OB)*: is the “I want to” aspect of an individual, an intentional behavior that influences expressed identity and the perceptions of the environment; which is seen and acknowledged (Anderson et al., 2018).
- *Phenomenography*: a method of exploring the phenomenon of interest by examining how a group of individuals experience said phenomenon, uncovering the similarities and differences of this shared experience (Rolls, 2023)
- *Problem A*: is the agreed common problem for which any team is formed (KAI Foundation, 2022, p. 213)
- *Problem B*: is any problem that impedes progress towards solving Problem A. Most often Problem B is associated with how best to work with each other, given our diversity (KAI Foundation, 2022, p. 213)
- *Social identity*: refers to what “I do”, and how I choose to interact with the social evaluation of the environment via group dynamics (Kirton, 2011, Anderson, 2023)

Summary

This study seeks to examine the problem-solving styles, expressed identity, coping behavior, and identity integration of evalpreneurs through the lens of Kirton's A-I theory. It aims to explore how the cognitive and social identities of evalpreneurs influence their interactions, particularly within team dynamics and collaborative relationships in evaluation consulting. By focusing on the differences between adaptive and innovative evalpreneurs, this research intends to provide insights into how these individuals solve problems, cope, and integrate their multiple identities in the rapidly evolving field of evalpreneurship.

Chapter Two

Literature Review

Kirton's Adaption-Innovation (A-I) theory has proven to be a valuable framework for understanding problem-solving styles, particularly among entrepreneurs (Buttner & Gyskiewicz, 1993), and has been widely applied across various fields, including leadership (Sheffield & Friedel, 2022) and organizational learning (Uwitonze et al., 2025). Since its introduction in 1976, more than 100 dissertations and theses have utilized the A-I theory and the KAI measure of problem-solving styles (KAI Foundation, 2024). Despite its broad application, the use of A-I theory within the emerging field of evalpreneurship remains underexplored. This study aims to expand the theory's application to evalpreneurship by specifically building on the previous research on evalpreneurship (Sabarre, 2021), the problem-solving styles of entrepreneurs (Buttner & Gyskiewicz, 1993; Previde & Kirton, 2021), coping behavior (Samms & Friedel, 2013) and expressed identity (Anderson et al., 2018) and identity integration (Cheng et al., 2008). By employing a theoretical framework based on A-I theory, this study enhances both

theoretical understanding and practical application of KAI among entrepreneurs in the U.S., integrating KAI with concepts like expressed identity and identity integration.

This chapter aims to review relevant literature on the above-mentioned concepts and key constructs. A central objective of this literature review is to present the conceptual and theoretical framework guiding this study.

Theoretical Foundation

Kirton's Adaption-Innovation (A-I) Theory

In 1976, British psychologist Dr. Michael Kirton introduced Adaption-Innovation (A-I) theory, which was designed to identify and measure the problem-solving style of individuals working in the context of managing change through collaborative problem-solving (Kirton, 2011). A-I theory posits that all individuals have a preferred style of problem-solving, which can be along a continuum from strongly adaptive to strongly innovative. This theory suggests that individuals vary in their approach to problems, engagement with structures, and work within established systems to manage change. Over the years, A-I theory has gained widespread recognition, with more than 300 scholarly articles and 100 graduate theses published across various disciplines, all grounded in A-I theory (KAI Foundation, 2023). These works have contributed to the broad applicability of the theory.

According to Kirton (2011), problem-solving style refers to the stable, preferred way an individual approaches problem-solving, with individuals preferring to operate more adaptively or more innovatively. Adaptive problem-solvers prefer to use structures to develop improved solutions, while innovative problem-solvers alter these structures or paradigms to create different solutions. To elaborate more, *Adaption* is defined as agreeing on and utilizing an existing

structure to solve a problem, thereby altering the original system for improvement (Friedel, 2014). Conversely, innovation involves solving a problem by first altering the cognitive structure itself, enabling space for refinement and modification, and resulting in a solution that differs from the initial approach (Kirton, 2011, as cited in Friedel, 2014, p. 66). Those who are more adaptive tend to work within predefined frameworks to arrive at better solutions, whereas those who are more innovative seek to reshape the structure, rules, and paradigms to arrive at different solutions (Kirton, 2011). Kirton (2011) suggested that everyone is a problem-solver and uses creativity to manage change and problem solve, either through a more adaptive style or a more innovative style.

Overview of the KAI

The A-I theory may provide insight into evalpreneurs' problem-solving preferences. The corresponding psychometric used to identify one's unique problem-solving style is the Kirton Adaption-Innovation Inventory (KAI), an inventory consisting of 32 assessment items developed by Kirton (1976). Since its introduction, KAI has shown high estimates of reliability and strong evidence of validity, making it a widely accepted instrument in studies, such as that of entrepreneurship (Goldsmith & Kerr, 1991; Buttner & Gryskiewicz, 1993), and is considered one of the leading measures of problem-solving preferences and differences in creativity and teamwork (Jablokow et al., 2009). The KAI identifies an individual's position on a continuum ranging from "more adaptive" to "more innovative" (Friedel, 2014). It measures a person's preferred problem-solving style, focusing on their cognitive approach rather than their skill level, experience, motivation, or behavior (Jablokow et al., 2010). The total KAI continuum ranges from 32 to 160, with a mean score of 95, representing a normal distribution curve for the general population (Figure 3). Sex differences have been observed in KAI scores, with females typically

are manageable, relevant, sound, safe, ready for immediate use, and expect a high success rate. While the more innovative (located toward the right of the mean) prefer to produce many ideas; some are seen as exciting, blue sky, a new dawn, outside the box, with toleration of a high failure rate.

The second construct, termed “style of efficiency (SE),” is the individual’s method of operation of change and problem-solving, and it ranges from 7 to 35 with a mean of 19 for this subscale (Kirton, 2011). The more adaptive (located toward the left of the mean) prefer to be precise, reliable, methodical, thorough, welcome change as an improver, and seek solutions to problems in tried and tested ways. The more innovative (located toward the right of the mean) prefer to think tangentially and approach tasks from unsuspected angles, welcome change as a paradigm breaker, and manipulate the problem by querying its basic assumptions (KAI Foundation, 2022).

Finally, the construct of style of rule-group conformity (SRG) describes the ways people manage structure to set the limits of change. It ranges from 12 to 60 with a mean of 35 for this subscale (Kirton, 2011). The more adaptive individuals (located toward the left of the mean) prefer to maintain continuity, stability, and group cohesion, while the more innovative (located at the right-side end of the mean) prefer to seek radical changes and are a catalyst to settled groups and consensual views (Jablokow, 2008). The more adaptive prefer to solve problems by using consensually agreed-upon rules and guidelines and prefer to work in structured situations with clear instructions, while the more innovative prefer to solve problems by using less structured work environments, and challenge consensual views (Friedel, 2014).

Behavior

Behavior is the sum of the operations that attain the “product,” an idea, or an artifact (Kirton, 2011). According to Kirton (2011), people prefer to behave in their preferred style and so “preferred behavior” is in line with style, by being either more adaptive or more innovative. This characteristic behavior, plus all the characteristic influences on behavior, make up personality (Kirton, 2011). Behavior is influenced by the elements of cognitive identity and impacts on the environment, from which, in turn, feedback is gathered and interpreted (Kirton, 2011; Anderson, 2023). The individual does not always behave in accordance with preference; hence, observed behavior is made up of preferred and coping behavior (Anderson et al., 2018). Coping behavior (with effort, I can) is a learned technique available from cognitive resources. It occurs when behavior needs to be in a style not in accord with the preferred style (Kirton, 2011). According to Kirton (2011), coping behavior refers to one’s operating outside of one’s preferred problem-solving style, either by being more adaptive or more innovative. Coping occurs when there is a cognitive gap, which is differences in understanding that exist between an individual and a problem, as well as among team members concerning the problem (Jablokow, 2008). As depicted in Figure 3, coping requires more energy and operates along two axes: intensity (ranging from more adaptive to more innovative) and duration (the amount of time spent coping), with motivation serving as its driving force (Kirton, 2011; Simpson, 2019).

Kirton’s Cognitive Function Schema

Kirton’s Cognitive Function Schema helps to explain brain function as if it is an organization, with “departments” that work in collaboration with each other to achieve the brain’s mission—to ensure the survival of the individual in the given environment (Kirton, 2011).

The schema (see Figure 3) provides insights into the reciprocal relationship among elements of expressed (cognitive) identity, behavior, and the social environment (Simpson, 2019; Anderson, 2023; Simpson et al., 2024).

Cognitive Resource

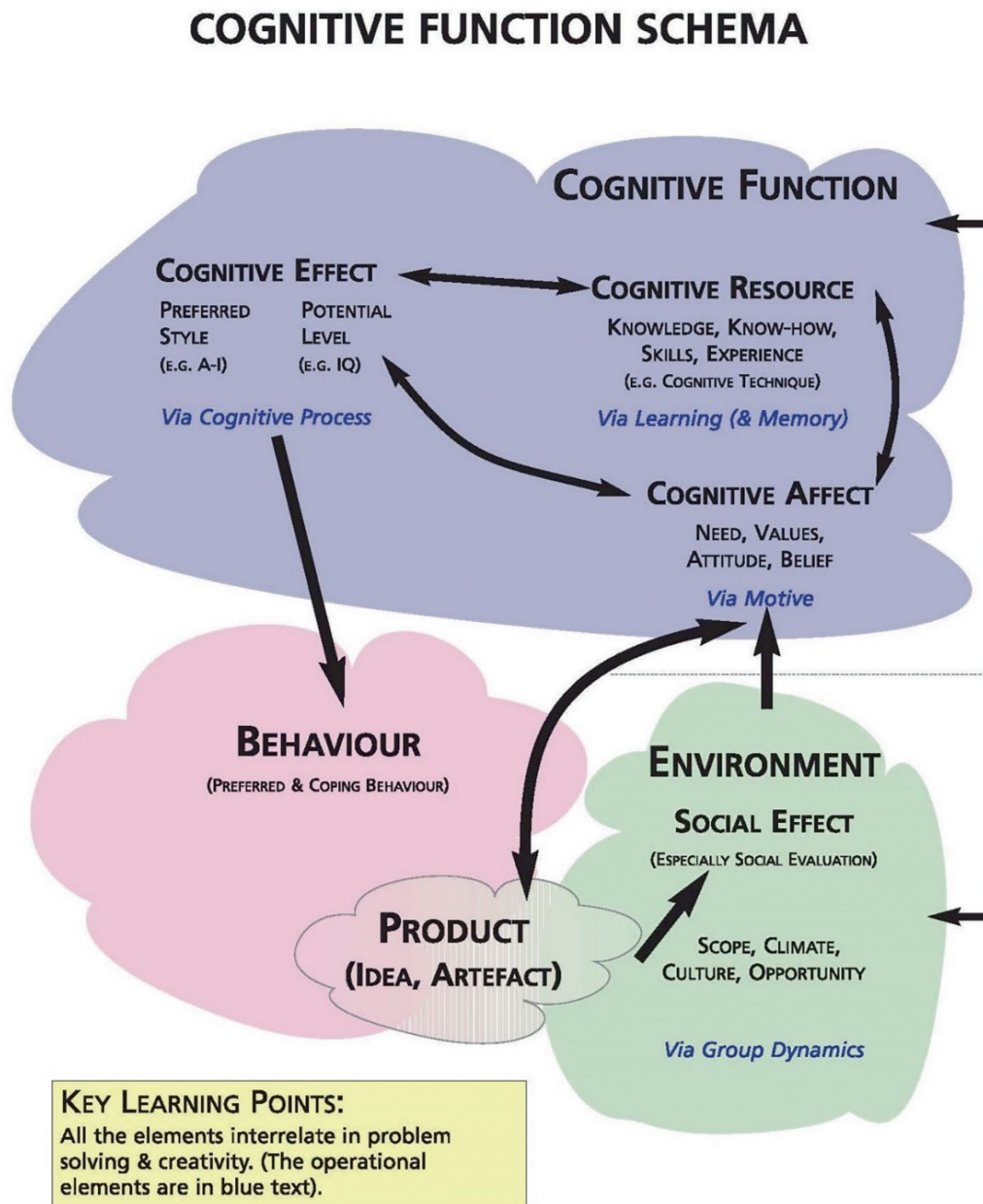
The self-perception of “I know,” through what means (*cognitive resources*) (Kirton, 2011). This includes aspects such as knowledge, specific competencies, and skills acquired through learning and lived experiences (Anderson, 2023). This (I know) comprises knowledge, skills, and other experiences of the individual (cognitive technique is a subset of knowledge and skill) (KAI Foundation, 2022). The learning process, associated with memory, is the operation that converts the outcomes of cognitive affect and cognitive effect into a resource for future problem-solving (Kirton, 2011). Hence, this department is a backroom powerhouse; its accumulation and availability of all past knowledge, experience, and skills give it a powerful influence.

Cognitive Effect

The self-perception of “I plan” (*cognitive effect*), includes two distinct elements of expressed identity, namely *cognitive style* (in what way I plan) and *cognitive level* (at what level) (Kirton, 2011). According to Kirton (2011), cognitive style is a stable (over time and across situations) identity characteristic of the individual. It is the preferred style or the manner in which an individual brings about change, decision-making, and solving problems (Friedel, 2014). According to Anderson (2021), problem-solving style is considered a hidden identity that forms an integral part of the broader expressed identity, encompassing various elements of cognitive function (Anderson et al., 2018). This style can play a critical role in shaping how evalpreneurs behave and collaborate within teams through group dynamics (Anderson, 2023)

Figure 3

Kirton's Cognitive Function Schema in Detail



Source: From Kirton (2011) and from KAI Foundation. (2022). KAI Accreditation Course Sourcebook C. Friedel, M.Seibel, P. Wolfe, Eds.). Copyright 1997 by M.J. Kirton and 2022 by KAI Foundation. Reprinted with permission from KAI Foundation.

Cognitive Affect

The self-perception of “I want” (*cognitive affect* including individual motives, needs, attitudes, and beliefs) (Kirton, 2011). This *cognitive affect* includes the value one places on the problem they are addressing, which is their source of motivation and can include other identities such as socio-cultural norms, values, and belief systems (Anderson, 2023).

Environment

According to A-I theory, environment, is a term that includes culture and climate—the social environment that is “my world”—or “reality as I have learned to perceive it” (Kirton, 2011). It includes social interaction via group/team dynamics and one’s experiences within the world around them (Simpson, 2019; Anderson, 2023). The environment has significant impacts on the individual’s self-image (identity), group (social) identity, motive, behaviors, and perceptions of the world around them (Kirton, 2011).

Cognitive Function Schema and Personality

Kirton (2011) emphasized the connection between problem-solving and personality, stating, "If problem-solving is the key to life, personality is the description of its stable, characteristic patterns of behavior and the influences that bring them about (e.g., traits and habits)" (p. 86). He proposed that personality represents the characteristic motives that drive a person—the processes by which energy is mobilized, gathered, and directed toward achieving a goal (Kirton, 2011). Kirton's understanding of self diverges from René Descartes' famous statement, “*Cogito ergo sum – I think, therefore I am*” (p.86). Instead, Kirton (2011) offered a biopsychological variant: “*Sum quod cogito – I live because I think,*” suggesting that problem-solving is central to human existence. He further expanded on the concept of personality, viewing it as “I am as I think” (*ita cogito sum*), defined by stable patterns of observed traits and habits.

According to Kirton (2011), individuals present preferred problem-solving styles—adaptive or innovative—as a dimension of one’s personality. Personality, in this context, helps shape how individuals prefer to engage with problems, structure information, and pursue change.

Supporting this view, studies have shown moderate to strong correlations between Kirton’s A-I measure and certain dimensions of the Myers-Briggs Type Indicator (MBTI), particularly Sensing–Intuition and Judging–Perceiving. Literature further reveals that adaptors are more closely associated with Sensing and Judging traits, while innovators align with Intuition and Perception (Carne & Kirton, 1982; Gryskiewicz & Tullar, 1995; Kirton, 1999). These findings reinforce the idea that problem-solving style is a dimension of personality.

Cognitive Function Schema as Applied to Various Aspects of Identity

Expressed Identity

One’s problem-solving style is a hidden identity (Anderson, 2021) that, together with other elements of the cognitive function, forms the expressed identity (Anderson et al., 2018; Simpson, 2019; Simpson et al., 2024). According to Anderson et al. (2018), Expressed identity (EI) represents an individual’s “I am” aspect, reflecting their positionality in a given context, and involves cognitive elements such as attitudes, beliefs, knowledge, preferences, and aptitudes that they choose to express. As outlined in the cognitive function schema, this expressed identity includes what I know (cognitive resource), what I want (cognitive affect), in what way I plan (cognitive style), and at what level I plan (cognitive level) (Kirton, 2011). All these elements of cognitive function are based on Kirton’s assumption that all people solve problems and are creative—both are outcomes of the same brain function (Kirton, 2011). Through the cognitive

process of the brain function, this expressed identity is concerned with the question “how I think, who I am” (Kirton, 2011).

Collaborative Identity

The concept of identity in collaborative relationships is another aspect of an individual’s identity that is visible and recognized by themselves and others, shaped by their interactions within social contexts and systems (Fish & Priest, 2011). This collaborative view of identity may reveal how a firm is shaped by shared values and beliefs within an organization, focusing on the level of collaboration and the commitment to working together in teamwork (Öberg, 2016). In team contexts, research has shown that cognitive diversity plays a role in shaping collaborative identity (Anderson, 2023). This aligns with Kirton's (2011) premise that every individual is a problem-solver and that when teams form to address a problem, they face two distinct challenges. Kirton refers to the first challenge as Problem A, which is the task or objective the team is set to accomplish together (Friedel, 2014). The second challenge, Problem B, arises from the diversity within the team and requires finding effective ways to collaborate despite the varying perspectives of team members (Kirton, 2011; Friedel, 2014). Addressing both Problem A and Problem B is where collaborative identity becomes vital. This identity allows individuals to navigate and determine the best ways to collaborate, particularly when faced with differing social identities, cognitive styles, lived experiences, personal motivations, values, biases, and diverse approaches to managing change (Anderson, 2021, 2023).

Kirton’s Cognitive Function Schema provides a valuable framework to understand how one’s identity comes into play during problem-solving efforts to address Problem A and manage Problem B (Kirton, 2011). Kirton’s Schema offers valuable insights into the reciprocal

relationship between an individual's cognitive processes, their collaborative behaviors, and their contribution to group and team dynamics (Anderson, 2023). Anderson (2023) emphasized that effective change management requires understanding each team member's collaborative identity and how it manifests in the workplace. He highlighted that this aspect of identity is shaped by cognitive processes. The first cognitive process is the *cognitive resource*, which refers to what an individual knows; the second is the *cognitive effect*, which involves the planning mechanisms for addressing Problems A and B; and the third is the *cognitive affect*, which relates to the value one places on the problem (Kirton, 2011; Anderson, 2023). Anderson (2023) further noted that collaborative identity can influence the behavior of the leader and their team members or collaborators, prompting them to either behave in line with their problem-solving styles, or cope by displaying behaviors outside their preferred styles (Kirton, 2011).

Social Identity

Another important identity characteristic highlighted in the Cognitive Schema's social evaluation is the role of social identity, especially when various social and other identities intersect with how team members or collaborators evaluate and respond to situations (Anderson, 2021, 2023). This social identity refers to what "I do" and how I choose to interact with the social evaluation of the environment via group dynamics (Kirton, 2011; Simpson, 2019; Anderson, 2023). As was noted by Simpson (2019) and Anderson (2023), external events arise from an individual's interactions with others, meaning that the behaviors and reactions of others contribute to each person's environment, while an individual's behavior also influences the environment of others. This interplay of social interactions is illustrated in the conceptual framework undergirding this study through the concept of "interaction via group dynamics" (Simpson et al., 2024). This social identity concept assumes that "I am your environment; you

are mine," thus emphasizing the significance of the social environment (Kirton, 2011). Kirton's view can be compared to other scholars who also noted that social identity is "The 'I' as part of an organization - how a party is perceived or perceives itself based on its connection to others" (Öberg, 2016, p. 32).

Literature on Identity Integration

Building on the understanding of various identities, the concept of *identity integration* further expands on how individuals achieve a cohesive and balanced sense of self. Drawing from Erikson's (1968) theory of lifespan development, identity integration refers to the process of unifying diverse and sometimes conflicting aspects of the self into a coherent whole (Syed & McLean, 2016). According to Syed and McLean (2016), *identity integration* is a critical element of psychological well-being, as it enables individuals to navigate complex life circumstances while maintaining a stable sense of self.

Identity Integration and Diversity

A recent study examining the role of identity and diversity posed the question, "How does diversity affect individuals and the groups in which they are embedded?" (Cheng et al., 2008, p. 1). Cheng et al. (2008) addressed this question in their research on Identity Integration (II), which refers to how individuals perceive the compatibility of the distinct identities or social groups to which they belong—either as compatible (high II) or incompatible (low II). Their study was based on the premise that individuals with high II are better at simultaneously accessing and navigating multiple identities and related knowledge, leading to enhanced well-being and social

outcomes. They argued that both individuals with high II and social collectives that foster II are more likely to benefit from diversity.

Cheng et al. (2008) primarily focused on demographic diversity—such as culture, gender, class, and race—but also acknowledged the need for further research into other types of diversity. One such form is cognitive diversity, which pertains to differences in problem-solving styles. Kirton's A-I theory, for example, views cognitive diversity as a significant factor in team dynamics, often referred to as "cognitive diversity" in much of the literature (Friedel, 2014). Subsequent studies have explored cognitive diversity as a hidden identity that can influence behavior and group dynamics (Anderson, 2021, 2023). Given this, there is a need to further investigate how the cognitive diversity of the more adaptive and innovative entrepreneurs is integrated with their other identities, particularly in team dynamics, and collaborative relationships.

Measurement of Identity Integration

Research has shown that individuals differ in identity integration (II), a concept that measures the degree to which two or more identities are seen as either compatible or in conflict with each other (Benet-Martinez & Haritatos, 2005; Cheng et al. 2007; Cheng et al., 2008). Cheng et al. (2008) argue that individuals with high identity integration see their identities as compatible and easily identify with both, while those with low identity integration experience tension and prefer to keep their identities separate. In previous research, Hall, Lopez, and Bansal (2001) found that individuals with low identity integration believe they can identify with one group at a time, depending on the context, and therefore suppress one identity when the other is activated, adjusting their behaviors accordingly.

Given the individual differences in how people manage and integrate their multiple identities (Cheng et al., 2008), several rating-scale instruments have been developed to assess identity integration (II). One prominent example is the Bicultural Identity Integration (BII) measure (Benet-Martínez & Haritatos, 2005), which originally focused on how individuals from immigrant backgrounds reconcile their ethnic and national identities. Over time, the measure was expanded to include individuals from mixed-ethnic backgrounds, assessing how they integrate multiple ethnic identities (Cheng & Lee, 2009). The BII measure uses a self-report tool to evaluate two key components of II: identity conflict and identity distance. Identity conflict refers to the perception that the values and norms of the two identities are fundamentally incompatible, while identity distance reflects the belief that the identities are separate and distinct (Benet-Martínez & Haritatos, 2005; Cheng et al., 2007). Other research has shown that the reliability of these subconstructs typically ranges from 0.70 to 0.80 (Nguyen & Benet-Martínez, 2007). Despite being a valid and reliable instrument to measure II involving cultural context, the BII does not measure all other forms of II. This suggests the use of other approaches, such as open-ended questions, to explore the intersections of multiple identities.

Additionally, research on identity integration (e.g., Maclean et al., 2004) has emphasized the role of moral values in shaping one's sense of self. Maclean et al. (2004) suggested that semi-structured interviews are an effective method for exploring how individuals integrate their values into their identity. They recommended questions such as “Do you feel that certain aspects of your identity are more authentic or true than others?” along with other open-ended prompts like “How do you experience your social role identity about how others perceive you?” In developing the data collection instrument for this study, I will integrate some of these questions

Identity Integration in Leadership Development and Evalpreneurship

While the study of identity is well-established in the fields of entrepreneurship and leadership, it remains underdeveloped within the discipline of evaluation—especially in the context of *evalpreneurship*, where evaluators operate as independent consultants and business owners. In entrepreneurship, identity is central to how individuals understand and perform their roles, with scholars framing it as a continuous process of constructing and negotiating the self (Ireland & Webb, 2007). Identity theory defines identity as “the conception of the self reflectively and discursively understood by the self” (Kuhn & Nelson, 2006), and it centers around fundamental questions such as “Who am I?” and “How should I act?”

Similarly, in leadership development, there has been a growing movement toward identity-based approaches that prioritize personal reflection and meaning-making (Clapp-Smith et al., 2019). This perspective encourages individuals to explore questions like “Who am I as a leader?” and “What does leadership mean to me?” (Petriglieri & Petriglieri, 2015). Research supports this shift, showing that leaders who develop a clear sense of identity are more likely to demonstrate authenticity, adaptability, and long-term effectiveness (Epitropaki et al., 2017). Leadership identity is not static—it evolves through lived experience, interpersonal relationships, and self-reflection (Hammond et al., 2017).

Among the most influential frameworks in this field is Hammond et al.’s (2017) multi-domain, identity-based approach to leadership education. This model emphasizes that leadership development should draw on life experiences from diverse domains—such as family, friendships, community, and school—not just the workplace (Hammond et al., 2017). This is especially important for evalpreneurs who not only occupy formal leadership positions within their evaluation consulting firms but also exercise leadership informally through collaborations and

interactions within their broader social networks (Sabarre, 2021). Unlike traditional models that emphasize external evaluations of leadership behavior, this approach centers on how individuals define, internalize, and express leadership based on self-concept and relational context (Epitropaki et al., 2017).

Leader identity theory, developed by Day, Harrison, and Halpin (2012), shifts the focus from static personality traits to the developmental processes through which individuals grow into leadership roles. Building a professional career similarly requires ongoing identity work—the active process of shaping, refining, and envisioning one’s professional self both in the present and into the future (Petriglieri et al., 2018). This identity development is most effective when supported by “identity workspaces”—environments that offer the psychological, emotional, and social support necessary for individuals to explore and construct their professional identities (Petriglieri & Petriglieri, 2010). Other research underscores that identity formation is inherently social, emerging through interaction with peer communities and networks (Kreiner et al., 2006). In this context, recent research on evaluation emphasized the critical role identity workspaces play in the development of Young and Emerging Evaluators (YEEs) (Bennani et al., 2021). These identity workspaces foster professional growth by cultivating peer support, emotional safety, mentorship opportunities, structured learning, and milestone experiences such as conferences (Bennani et al., 2021). Evaluation consulting firms, when intentionally designed, can serve as such identity workspaces, allowing evaluators to reflect on their journeys, craft narratives, and integrate various aspects of their identities into a cohesive professional self (Kroger, 2015; Petriglieri et al., 2018).

This identity-centered approach is particularly powerful for emerging leaders. Identity development can serve as a motivational mechanism, especially for individuals with limited

formal leadership experience (Kragt & Guenter, 2018). Activities that encourage students to construct a personal leader identity narrative—connecting various life experiences to leadership—can foster long-term growth (Ibarra & Barbulescu, 2010; Alvesson & Sveningsson, 2016).

Central to Hammond et al.'s (2017) framework are four dimensions of leader identity, which are particularly relevant for leaders in the evaluation business-evalpreneurs (Sabarre, 2021). The first dimension is “Meaning,” which refers to how individuals define leadership. This definition is often shaped by the leaders’ implicit leadership theories (ILTs), which are mental models about what constitutes effective leadership (Lord et al., 2020). As evalpreneurs gain experience, their views of leadership tend to evolve from more traditional, authority-based models to more collaborative and inclusive interpretations (Day & Harrison, 2007). The second dimension, “Strength,” refers to how individuals perceive their leadership identity. This strength is built through social interactions where individuals “claim” leadership roles (asserting their leadership presence) and are “granted” recognition by others as leaders (DeRue & Ashford, 2010). For evalepreneurs, these interactions are crucial in establishing their credibility within the field and their role in shaping new business models. The third dimension, “Levels,” encompasses the different layers through which identity is expressed: personal (individual traits), relational (identity in connection with others), and collective (membership in groups) (Brewer & Gardner, 1996; Epitropaki et al., 2017). In the case of evalpreneurs, these layers reflect not only their traits but also how they navigate their relationships within the broader evaluation community and industry. Finally, “Integration” refers to how seamlessly a leader’s identity is woven into their overall self-concept across various life domains, including personal, professional, and social spheres (Hammond et al., 2017). For evalpreneurs this integration is key to balancing the

demands of running an evaluation business with their broader various identities, embedded in every aspect of their work and life.

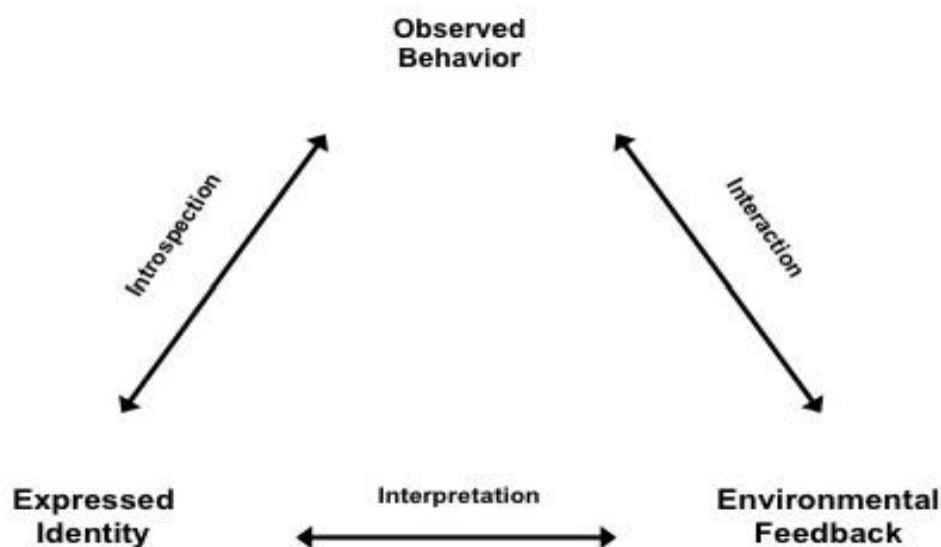
Conceptual Framework for the Study

Organismic Socio-Behavioral Perspective (OSBP)

The conceptual framework guiding this study is the Organismic Socio-Behavioral Perspective (OSBP) model developed by Anderson et al. (2018). Grounded in Bandura's Social-Cognitive Theory (SCT) and Deci and Ryan's Self-Determination Theory (SDT) (Deci & Ryan, 2012), the OSBP model presents a triadic framework that explores the interaction between three components: expressed identity (EI), observed behavior (OB), and environmental feedback (EF). According to Anderson et al. (2018), expressed identity (EI) reflects an individual's "I am" aspect, representing how evalpreneurs may choose to express in the social environment. This component includes factors influencing the way evalpreneurs express their identity, such as attitudes, beliefs, knowledge, preferences, and aptitudes that individuals choose to communicate or express (Anderson, 2023). The second element, observed behavior (OB), is characterized as the "I want to" aspect, which includes both preferred behaviors aligned with one's preferred problem-solving style (adaptive or innovative), and coping behavior, which reflects actions taken outside one's preferred style to meet external demands (Kirton, 2011). This OB helps to learn about how evalpreneurs are behaving in preferences related to their identity or outside their identity. Finally, environmental feedback (EF) represents the "how I am perceived by others" aspect, in response to an individual's behavior, often involving the reactions and judgments from the social and environmental context (Anderson et al., 2018).

Figure 4

Conceptual Model for the Study: Organismic Socio-Behavioral Perspective (OSBP)



Source. Anderson et al. (2018). Reprinted and used with Permission.

Aspects of the Conceptual Model

According to Figure 4, the OSBP model presents process as a triadic reciprocal model, where the perceived value of one's expressed identity, shaped by introspection and interpretation, influences behavior. This behavior, in turn, generates feedback from the environment, which further regulates the individual's interaction with it. The model is built on a triadic, reciprocal process encompassing:

(1) Introspection— or self-analysis or the internal reflection through which individuals assess the alignment between their identities, goals, and actions. For evalpreneurs, this includes examining how their multiple identities intersect with their problem-solving styles to influence their observed behavior among teams and collaborative relationships.

(2) Interpretation—the process by which individuals assign meaning to their identities based on perceived social and professional value. This influences how evalpreneurs present themselves and navigate expectations within their environments.

(3) Interaction—the ongoing negotiations between evalpreneurs and their teams, collaborators, or others in the external environment. This captures the aspect of social identity and group dynamics in teamwork and collaborative relationships.

Hence, the OSBP model offers a framework for understanding the dynamic relationships between problem-solving style, expressed identity, and coping behavior (Anderson et al., 2018).

Conceptual Model in Action

A sample vignette illustrates the model's relevance to the study: Victor is 35 years old. He is an African American who recently completed his Ph.D. at a reputable university in the U.S. For the past seven years, Victor has been working in a full-time position in a research organization. His work involved working closely with the monitoring evaluation and learning unit as well as coordinating the work of external consultants in his department. After observing and learning from the work of those consultants, Victor realized that he could earn additional income by doing consultancy as a side hustle. Two years later, Victor began to do part-time consulting assignments as an independent consultant (freelancer). Three years doing part-time consultancy, Victor feels like he has acquired skills, knowledge, and experiences in consulting practices (cognitive resources). He decided to start his own management consulting company after being encouraged by a speaker in a training workshop organized by an evaluation conference, which took place in his hometown (interaction). Prior to attending this conference, Victor had never considered evaluation entrepreneurship (starting business offering research, or

consulting or evaluation services) to be part of his professional career (introspection). When he left this training, something happened in Victor's attitude and belief toward becoming an entrepreneur (cognitive affect). Victor registered his formal consulting company as a profit-making business (LLC), with the help of a business mentor.

At the beginning of his new career as a business owner, Victor did not secure clients right away. He opted to work in collaboration with other firms (as a subcontractor), by joining an established company with many projects and teams. A few months later, Victor joined a project that had a team of consultants with diverse backgrounds, skills, and experiences in the subject matter. However, as the team started to figure out how best they should work together as a problem-solving group, it was evident that some internal challenges and conflicts among the team members occurred (Interaction). The group ended up being dysfunctional and could not complete the project on time. Reflecting on this experience, Victor understood that to be a successful entrepreneur he must learn how to build a diverse team and/or learn to be in a collaborating team or partnership with other consultants (Introspection). Victor also learned that some people with similar experiences found some tasks daunting (requiring a lot of mental and emotional energy to perform or coping behavior) while others were easier to do (preferred behavior). In addition to this reflection, Victor noted a reciprocal action or influence when entrepreneurs interact with their environment (i.e. with their clients, including commissioners, community or project stakeholders, fellow service providers, or other actors) (Interaction).

Within this model, elements from the conceptual mode are evidenced as Victor seeks to navigate entrepreneurship in the evaluation market (Environment). The vignette shows how both the cognitive resources and affect were integral parts of Victor's expressed identity as an entrepreneur. The vignette also depicts a constant evaluation of Victor's behaviors, cognitive

processes, perceptions of interactions within evalpreneurship, and how they impacted Victor's experiences.

Literature Review on Evalpreneurship and Evalpreneurs

Evalpreneurship is an emerging field of inquiry and practice within the evaluation marketplace. As a concept, evalpreneurship was crafted and first introduced in the scientific literature in 2021 by Dr. Nina Sabarre in her dissertation study examining entrepreneurship's role within the evaluation marketplace in the U.S. (Sabarre, 2021). As the name suggests, evaluation entrepreneurship or evalpreneurship is a fusion of two distinct trans-disciplines: evaluation and entrepreneurship. The concept was defined by Sabarre (2021) as "The capacity and willingness to develop, organize, manage, and assume the risk of a business that sells evaluation-related products and services" (p.7). This definition revealed that evalpreneurs have an improved capacity beyond designing and conducting evaluations, are willing to operate a business, and have the emotional strength to take on risks. As Sabarre (2021) noted, evalpreneurs are leaders of evaluation business.

Sabarre (2021) differentiates between independent evaluation consultants and evaluation entrepreneurs (evalpreneurs), noting that while both operate within the evaluation field, their professional identities and responsibilities vary significantly. Drawing on Godin (2016), Sabarre describes freelancers as individuals paid for their time or project-based work, whereas entrepreneurs build and manage businesses beyond themselves. Consultants generally work on short-term contracts, providing specialized services without long-term commitment or authority to implement change (Barrington, 2011). Entrepreneurs, by contrast, commit to the long-term development of their business, embracing higher financial and personal risk (Kitching &

Smallbone, 2012; Lyons & Harrington, 2006). These differences suggest that evalpreneurs must have different skill sets that go beyond traditional evaluation training but also include strategic business development and risk management.

Another key distinction lies in payment structures and business models. Independent consultants are typically self-employed sole proprietors or partners who charge fees per hour or per project and cover their own overhead costs (Barrington, 2011). Entrepreneurs, however, may establish corporations or LLCs, earning income based on company performance and managing broader operations, including hiring staff and securing multiple contracts (Godin et al., 2017). While consultants often operate as "moonlighters" alongside full-time roles (Scriven, 1995; Sturges, 2014), entrepreneurs dedicate themselves fully to business growth. Incorporating a business provides entrepreneurs with legal protections and greater credibility but also introduces new challenges, such as administrative costs and staff management (Barrington, 2011). These contrasting models underscore the unique competencies required for evalpreneurship in today's dynamic consulting landscape. These distinctions are reflected in their business structures, compensation models, levels of commitment, motivation, autonomy, and risk tolerance (Sabarre, 2021).

Demographic Characteristics of Evalpreneurs in the United States

A recent survey by the American Evaluation Association's Independent Consulting Topical Interest Group (AEA IC TIG, 2022) offers a detailed overview of the demographic characteristics of independent evaluation consultants, in the United States. The survey reveals that 90% of these consultants operate across all 50 states and the District of Columbia, indicating a broad geographic distribution. The demographic composition of the field is predominantly

White (44%), with smaller proportions of Black/African American (6%), Asian (3%), and Latinx/Hispanic (3%) individuals, highlighting the racial diversity within the profession. In terms of gender, a significant majority (81%) identify as women, while 16% identify as men, and 3% as non-binary or gender non-conforming, reflecting the growing representation of diverse gender identities. The survey also shows that evalpreneurs are highly educated, with 54% holding doctoral degrees, 28% possessing masters' degrees, and 19% having professional degrees such as Masters of Divinity (MDiv), Master of Business Administration (MBA), and others. The evaluation consulting industry has been rapidly expanding, with 60% of the respondents having launched their businesses between 2012 and 2022, and 26% of them starting their businesses in 2020 alone. Furthermore, the survey indicates that a majority of evalpreneurs (59%) work full-time, 22% work part-time, and 62% employ independent contractors, suggesting the emergence of sizable consulting practices that classify them as evalpreneurs with well-established operations (AEA IC TIG, 2022).

Evalpreneurs' Niche in the World of Independent Consulting Business

In the business consulting landscape, evalpreneurs hold a distinct and valuable role, particularly within the niche of independent and boutique consulting. By definition, evalpreneurs as owners and co-owners of consulting firms, come in various sizes, each with its structure and approach (Sabarre, 2021). In terms of size, there are evalpreneurs in large consulting firms, with over 500 employees. These manage broad, complex projects and employ large teams of consultants, analysts, and managers (Barrington, 2011). Evalpreneurs in medium-sized firms have 50 or more employees and tend to be specialized, while the small and medium sized firms, also known as "boutique firms," employ a small team ranging from fewer than five to no more than 50 staff members (Barrington, 2011). These boutique firms are frequently led by sole

practitioners or small teams of evalpreneurs with specialized expertise, often in fields such as evaluation. In the U.S., many evalpreneurs operate within this boutique model. According to Barrington (2011), such firms are often founded by former executives, independent consultants who have left large firms, professionals offering niche consulting alongside full-time employment, or university professors providing expertise in their academic disciplines. Another category of evaluation professionals includes internal consultants, such as intrapreneurs, who operate within large organizations like corporations or government agencies. They deliver in-house evaluation services—either directly or by managing evaluation teams to support evidence-based decision-making, enhance program effectiveness, and ensure accountability (Barrington, 2011).

Understanding Evalpreneurs as Problem-Solving Leaders

As an emerging field, evalpreneurship has yet to be examined through the cognitive lens using A-I theory. However, to study evalpreneurs as problem-solving leaders, literature has suggested the problem-solving leadership framework (Jablokow et al., 2010), based on Kirton's problem-solving theory (Friedel, 2023), Guilford's problem-solving process, and Rhodes' (1961) problem-solving elements. This framework highlights Rhodes' (1961) four basic components of problem-solving, also referred to as the 4Ps: Person, Process, Product, and Press (Environment). These are presented in Jablokow et al. (2010)'s problem-solving leadership framework, as follows:

The person is represented by the problem solver(s), who is/are engaged in a problem-solving process, alone or in collaboration, aimed at solving a particular problem within a given environment. The problem-solving process results in an outcome or product, which may be tangible (e.g., reports, tools, programs) or intangible (e.g., ideas, models).

Although empirical research on this subject is still limited, when the elements of problem-solving are applied to evalpreneurs, they emerge as problem-solving leaders in the following ways. First, in terms of the person/problem-solver, the evalpreneur's influence reaches every individual in the organization. The evalpreneur is the ultimate leader of the organization who decides on the hiring, assigning tasks, and performance appraisal of the technical staff, including the evaluation consultants team members. Second, in terms of the problem-solving process, the evalpreneur understands the business, especially how the organization makes and manages money, risks, contracts, and knowledge (Barrington, 2011). Third, the evalpreneur is in a prime position to track the products of organizational problem-solving (i.e., the changes produced) relative to the vision and to provide insights on how change might be managed more effectively (Jablokow et al., 2010). Finally, these three forms of influence, coupled with the power inherent in an executive position, help to define the problem-solving environment (i.e., the catalysts for and barriers to problem-solving)—both within the evaluation team and within the organization.

Furthermore, while empirical research on this topic remains limited, existing literature suggests that Kirton's key problem-solving variables—namely opportunity, motive, level, and style (Kirton, 2011)—offer valuable insights into problem-solving leadership (Jablokow et al., 2010). However, these variables have yet to be explored within the context of evalpreneurship, highlighting a significant gap in literature.

Opportunity. If problem-solving is central to life and all individuals are inherently problem-solvers (Kirton, 2011), then for problem-solving to take place, opportunities must arise. These opportunities are often either revealed, actively sought, or made apparent through the environment (Kirton, 2011). For example, evalpreneurs build their brands and bring in new business opportunities by soliciting referrals and new work from past clients, responding to Requests for Proposals (RFP), and networking at conferences and speaking engagements (Sabarre, 2021). They largely depend on word-of-mouth and relationships to generate ongoing and new business (Sabarre, 2021). This suggests that the environment is a key source of opportunities, meaning problems, that every problem-solver must identify and address (Jablokow et al., 2010).

After seizing the opportunity, there comes planning, finding a solution, and implementation. Among such plans, the evalpreneurs may use some of the following models for capturing business opportunities, as outlined in Sabarre's (2021) study on evalpreneurship:

- (a) direct sales (marketing and selling products to customers directly through personal contact arrangement),
- (b) premium offering high-end products and services appealing to selective customers,
- (c) monopoly (having a service or product that nobody else provides,
- (d) Sourcing (when more than one party needs to work with another to be successful) and network effect (value of one's service goes up when more people use it) (p. 63).

Motive. Another key element a successful problem-solver must have and maintain is motive (the personal driving force). This motive is essential for guiding problem-solving efforts, as it directs one's energy toward a specific goal with the intensity and duration needed to effectively address the problem (Jablokow et al., 2010). Further, motive is the fundamental process that allows the evalpreneur to filter through various potential problems (opportunities) and select which ones to pursue, as well as the order in which to tackle them. Although not directly related, one can observe motive in the evalpreneurs' initial motivation that led them to

start their own evaluation consulting business. According to Sabarre (2021), most evalpreneurs are motivated to:

(1) work according to one's goals, values, interests, and lifestyle (Desire for autonomy and flexibility); (2) contribute to societal betterment or make a lasting difference in the world (Aspirations to leave a legacy or make an impact); (3) develop new tools or methods to meet the evolving needs of clients (interest in innovation); (4) meet needs of one's personal life, specific circumstances, or societal issues outside of their control (external factors); (5) earn a living as well as attain financial stability and growth (p.65).

Style and Level. Two cognitive facilities, namely level (capacity) and style (preference), are important elements of problem-solving needed to seize opportunities and act upon them (Jablokow et al., 2010). Literature suggests that this capacity includes the individual's inherent potential capacity (such as intelligence or talent) and manifest capacity (such as technical competence or managerial skill) (Sheffield, 2019; KAI Foundation, 2022). One example of the intellectual capacity that evaluation consultants and evalpreneurs must have are strong research and critical thinking skills (Barrington, 2011). As knowledge workers in the gig economy, evalpreneurs' expertise is built on their knowledge base, but they also need to possess strong entrepreneurial capacity (Sabarre, 2021). Problem-solving and cognitive abilities are crucial, as evaluation professionals apply their strong cognitive skills to critically evaluate and interpret research findings, while also identifying gaps and limitations in the evidence (Barrington, 2011). Barrington (2011) further emphasized that teamwork has become an increasingly vital skill in evaluation consulting. Other essential capabilities include “analytical skills, the ability to get along with a wide range of people, strong oral and written communication skills, good judgement, time-management skills and creativity” (Barrington, 2011, p. 8)

Identified Research Gaps from the Literature Review

Research Gap #1. While the scholarship and practice of evaluation often focus on capacity to solve problems, the problem-solving style receives little attention. Problem-solving style refers to how individuals prefer to approach the process of solving problems (Sheffield, 2019). This unique style is defined as the “strategic, stable, characteristic, preferred way in which people respond to and seek to bring about change” (Kirton, 2011, p.68). Kirton’s significant contribution emphasizes style, clearly distinguishing it from the level of creativity and problem-solving (Friedel, 2014). As Friedel (2014) further explained, understanding an individual's style does not reveal anything about their capacity, and vice versa, despite the two often being conflated in practice. Furthermore, the style measure using KAI reveals distinguishing behavioral characteristics of more adaptive and more innovative problem-solvers (Table 1).

While these behavioral characteristics of the more adaptive and more innovative problem-solvers have been studied and documented (KAI Foundation, 2022), the specific applicability of the behavioral characteristics of evalpreneurs as problem-solvers remains largely unexplored. For example, the trait of risk-taking is identified as central to evalpreneurs (Sabarre, 2021), aligns with Kirton’s (2011) descriptions of innovative individuals. On the other hand, evaluators often working with the problem at hand to make recommendations for incremental improvements aligns with Kirton’s (2011) description of adaptive individuals. There is a lack of research examining how these traits manifest within evalpreneurs and influence their approach to problem-solving and leadership in the evaluation field. Kirton's distinction between "adaptive" and "innovative" behavioral characteristics has yet to be applied to evalpreneurs, creating a notable gap in the literature.

Table 1

Behavioral characteristics of more adaptive and more innovative problem solvers

| Characteristics | More Adaptive | More Innovative |
|---------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Perceived behavior | Are perceived by more innovative as: Sound, conforming, safe, predictable, inflexible, intolerant of ambiguity | Are perceived by more adaptive as: Exciting but unsound, impractical, risky, threatening the established system |
| Problem defining | Tend to accept the problem as defined (i.e. within the paradigm); seek immediate, increased efficiency | Tend to challenge the generally accepted perception of problem, changing the paradigm to solve the problem; seek long-term gains rather than immediate efficiency |
| Solution generating | Often generate few novel, creative, relevant and acceptable solutions aimed at 'doing things better' | May produce numerous ideas, not all will be relevant or acceptable to other members of group, aimed at 'doing things differently' |
| Policy formulation | Prefer well-established, structured situations; incorporating new data or events into existing structures aimed at increasing efficiency a strength | Prefer less structured situations; use new data to create different structures or policies as they are often less protective of the current paradigm |
| In organizations | Essential for the ongoing functions, but in times of expected changes may have some difficulty moving out of their established roles | Essential in times of unexpected, turbulent change or crisis, but may have trouble applying themselves to ongoing organizational demands |

Note. Adapted from 'Characteristics of Adaptors and Innovators' in KAI Foundation, 2022, *KAI Accreditation Sourcebook* (C. Friedel, M. Seibel, P. Wolfe, Eds.), p. 112. Copyright 2022 by the KAI Foundation. Used with permission.

Research Gap #2. Despite growing research on problem-solving styles and coping behavior, significant gaps remain in understanding and defining these constructs in evalpreneurship. Coping is generally understood as an ongoing, adaptive process involving cognitive and behavioral strategies to manage internal or external demands perceived as exceeding an individual's resources (Folkman et al., 1986). Lazarus (1966) emphasized that

coping is a continuously evolving process that helps individuals manage overwhelming stressors. Moreover, Kirton (2011) defines coping behavior as the effort to operate outside one's typical problem-solving style to meet situational demands. While this insight is valuable, limited research has explored how different problem-solving styles—as adaptive versus innovative—affect coping behavior, particularly in professional contexts. Although prior studies have explored the relationship between problem-solving styles and coping behavior (Samms & Friedel, 2013), there remains a lack of conceptual clarity in the literature regarding key coping-related constructs such as *coping behavior*, *coping technique*, *coping reaction*, and *coping response*. Specifically, while Samms and Friedel (2013) focused on students' coping behavior, there is a notable gap in research exploring how evalpreneurs manage coping behavior and related constructs, including coping response, coping direction, thoughts and feelings during coping, and external awareness of coping reactions.

Research Gap #3. The current literature review has suggested that problem-solving style is both a cognitive preference and a vital component of expressed identity, influencing how individuals think, relate, and lead in distinct ways depending on their adaptive or innovative styles (Anderson et al., 2018; Anderson, 2021; Simpson et al., 2024). This understanding supports Kirton's (2011) assertion that identity fundamentally answers the question "How do I think, who am I?" Building on Kirton's A-I theory, the cognitive function schema, and the OSBP conceptual model (Kirton, 2011; Anderson et al., 2018), there is a critical need for more research to explore the interplay between problem-solving styles and expressed identity, particularly within the context of evalpreneurs. Additionally, although identity integration has been extensively examined across multiple disciplines, little attention has been paid to how evalpreneurs easily or hardly integrate their multiple, potentially conflicting identities (Cheng et

al., 2008). Given that identity integration is crucial for psychological well-being by facilitating the reconciliation of conflicting self-aspects (Syed & McLean, 2016), there is a distinct gap concerning how evalpreneurs balance their professional and personal identities amid unique challenges such as managing business operations, client relationships, collaborations, and family responsibilities. Addressing this gap will enrich the literature on leader identity, expressed identity, and identity integration as well as in the emerging field of evalpreneurship.

Summary

Chapter two provided an in-depth review of key theories relevant to evalpreneurship, focusing on cognitive and social identity frameworks. It explored Kirton's Adaption-Innovation (A-I) theory, which differentiates problem-solving styles, and examined the role of expressed identity, social identity, and collaborative identity in shaping evalpreneurs' work. The chapter also introduced the Organismic Socio-Behavioral Perspective (OSBP) as a conceptual framework to understand the interaction between the expressed (cognitive) identity, behavior, introspection, and interpretation of evalpreneurs. The review established a conceptual framework for the study, integrating these theories to explore how evalpreneurs' problem-solving preferences and social identities impact teamwork and collaborative relationships in evaluation consulting.

Chapter Three

Methodology

Chapter three of this dissertation presents the research design and methodology, outlining the methods, instruments, procedures, and data analysis techniques employed in the study. The primary objective of this research is to investigate how adaptive and innovative evalpreneurs differ in their problem-solving styles, coping behavior, and the integration of multiple identities within teamwork, group dynamics, and collaborative relationships in evalpreneurship. This study specifically aims to address the following research questions:

- (1) What are the problem-solving styles and identity factors of evalpreneurs?
- (2) In what ways do adaptive and innovative evalpreneurs integrate their identities, particularly in the context of teamwork and group dynamics?
- (3) How are coping behaviors evidenced among the more adaptive and more innovative evalpreneurs comparatively?

To explore these questions, a qualitative research design was employed, guided by phenomenography methodological approach (Rolls, 2023). According to Rolls (2023), phenomenography allows for an in-depth exploration of how individuals in the adaptive and innovative groups of evalpreneurs experience their work, uncovering both the similarities and differences in their problem-solving preferences, coping behavior, and expressed identity integration. The intended outcomes of this phenomenographic study are to identify and characterize the unique problem-solving styles and coping behavior of evalpreneurs and to explore how their social, collaborative, and other identities differ in the context of teamwork and other collaborative relationships in the evaluation consulting.

Research Paradigm for This Study

A research paradigm serves as a foundational framework comprising shared beliefs and assumptions that guide researchers in shaping their perspectives on the nature of reality, knowledge, and research methodologies (Patton, 2015; Rahi, 2017; Kivunja & Kuyini, 2017). The concept of a research paradigm has evolved and has been described in various ways within academic discourse. Originally introduced by American philosopher Thomas Kuhn in his seminal work "Structure of Scientific Revolutions" in 1962, the term paradigm denoted a philosophical way of thinking (Kuhn, 2012). It gradually gained a more specific definition, referring to the "logical or conceptual structure" serving as a framework of thought within a specific field or experience. Etymologically, the word paradigm derives from the Greek term "paradeigma," meaning "pattern or model." In research methods literature, the term paradigm is often referred to as a philosophical worldview, denoting a basic set of beliefs that guides action (Creswell & Creswell, 2017). In other disciplines within the social sciences, paradigms are sometimes termed epistemological stances and theoretical perspectives (Crotty, 2020) or philosophical foundations (Neuman, 2014). Regardless of the terminology used, a paradigm encapsulates a researcher's "worldview(s)"—"a perspective, school of thought, or a set of shared beliefs that shape the meaning and interpretation of research data" (Kivunja & Kuyini, 2017).

Four fundamental elements play a pivotal role in research paradigms: epistemology, ontology, methodology, and axiology (ethics) (Kivunja & Kuyini, 2017). Epistemology, as described by Krauss (2005), pertains to the philosophy of knowledge, focusing on how individuals acquire understanding and knowledge. It delves into the nature of human cognition and comprehension within the researcher's specific field of study. On the other hand, ontology delves into the philosophy of reality, questioning the very essence and nature of the social

phenomena under investigation (Scotland, 2012). It deals with the assumptions made about the reality or meaningfulness of the subject, exploring the fundamental nature of the phenomenon being studied. Epistemology and ontology are interconnected, exerting a profound influence on each other. The beliefs about the nature of reality (ontology) shape the ways individuals come to know and understand that reality (epistemology). These two elements act as guiding principles, informing the selection of appropriate methodologies for research (Scotland, 2012).

Methodologies are specific practices and techniques employed to acquire knowledge and comprehend the complexities of the world (Rehman & Alharthi, 2016). The interplay between epistemology and ontology significantly influences the researcher's choice of methods, impacting the entire research process.

This study is rooted in the cognitive and social constructivist paradigms. Both paradigms stem from constructivism, a theory of learning, which posits that individuals actively construct reality based on their subjective experiences and interpretations (Gergen, 1999). A distinguishing difference is that cognitive constructivism focuses on individual cognitive processes, while social constructivism emphasizes the role of social interaction and cultural contexts in shaping knowledge (Kumar & Gupta, 2009; Kalina & Powell, 2009). Based on Jean Piaget's work, cognitive constructivism asserts that knowledge is formed through a knower's mental (hence cognitive) processes (Piaget, 1985; Hruby & Roegiers, 2012). Focusing on mental processes in learning and problem-solving, this theory recognizes an individual's active role in constructing knowledge and the significance of cognitive processes (Piaget, 1985).

Social constructivism asserts that individuals shape their identities by aligning ideas with lived experiences, highlighting the significance of socio-cultural awareness (Agius, 2013; McKinley, 2015). This framework emphasizes the impact of social interactions and cultural

contexts on knowledge construction, particularly in collaborative settings (Kalina & Powell, 2009). Rooted in the belief that understanding is shaped by subjective experiences, social constructivism underscores the importance of cultural contexts in forming meaning (Patton, 2015; Scotland, 2012). By focusing on the active construction of knowledge through social interactions, this approach values open-ended questions to capture diverse perspectives (Creswell & Creswell, 2017).

Both cognitive and social constructivism promote qualitative research methods, aligning with phenomenography to explore the identity and behavioral characteristics of adaptive and innovative evalpreneurs, as well as the interrelationships between their similarities and differences (Åkerlind, 2012). As a phenomenographic researcher, my ontology was informed by the assumptions that there are multiple ways of experiencing the world and that the internal and external worlds are interconnected through an individual's awareness (Rolls, 2023). However, my epistemological assumption is that, since individuals perceive a phenomenon in diverse ways, their awareness and descriptions of it will vary, yet remain related, and are likely to evolve over time (Hajar, 2021). It is on this background that I conducted this phenomenographic study to explore *what* is experienced and *why* similarities and differences exist among participants (Rolls, 2023). Given that phenomenography aims to reveal the collective lived experience in all its complexity and variability, it is particularly well-suited for the exploration of evalpreneurship using the cognitive lens.

My Reflexivity Statement

As already mentioned, this study embraces a cognitive and social constructivist ontology and epistemology to which the researcher subscribes, acknowledging that reality is actively constructed through mental processes and social interactions (Piaget, 1985; Gergen, 1999). Accordingly, the researcher aligns with a constructivist epistemology, which views knowledge as subjective, context-dependent, and co-created through human experiences rather than discovered as absolute truth (Scotland, 2012; Patton, 2015). Rooted in this worldview, the researcher adopts a phenomenography methodological approach to explore the varied ways in which adaptive and innovative evalpreneurs describe their expressed identities, and experience coping behavior, and identity integration. The researcher identified as an African male raised in a two-parent household in a rural community in Rwanda, East Africa, and since 2021 had relocated to the United States. As a first-generation college student, his personal and background in evaluation consulting likely influenced both his interactions with participants and the interpretation of the data. The researcher's first language is not English. This factor may have impacted communication dynamics and potentially influenced the data collection and interpretation of participant responses. Additionally, the study was conducted during the 2024 U.S presidential election campaigns and during President Donald Trump's new administration since January 20, 2025. As such, there was uncertainty regarding the political and social changes, which slowed the data collection process and affected participant openness.

Further, the researcher completed the KAI accreditation course offered by KAI Foundation and Virginia Tech, granting him to be a certified KAI practitioner. He has also pursued coursework in A-I theory, which examines problem-solving and creativity in the context of diversity and change. The researcher is well-versed in the Cognitive Function Schema, which

explores the interplay between cognitive function, behavior, and the social environment. In addition, he is currently working toward a graduate certificate in problem-solving for leading social change at Virginia Tech. This ongoing education reflects the researcher's strong commitment to fostering collaborative problem-solving, managing diversity, and leading teams through change.

Furthermore, the researcher's interest in evalpreneurship extends beyond simply researching the topic; he aspires to become an evalpreneur himself. As such, he identifies as an "evalpreneur" (Uwitonze, 2023). This identity was highlighted in a post on the AEA 365 blog on October 21, 2023, where the researcher reflected on his journey into the field of evaluation, driven by his interest in evalpreneurship. In the AEA 365 blog post of the American Evaluation Association, Uwitonze (2023) discussed how his dissertation work contributes to my goal of becoming an evaluation consultant /evalpreneur.

Methodological Approach Through Phenomenography

Some of the most recognized qualitative approaches include grounded theory (Charmaz, 2014), ethnography (Denzin, 2006), phenomenology, narrative inquiry, case studies, action research (AR), and participatory action research (PAR) (Patton, 2015). Phenomenography, a less commonly known qualitative methodology, was developed by Ference Marton and his colleagues at the University of Gothenburg in Sweden in the mid-1970s to explore variations in how a particular phenomenon is experienced (Marton & Booth, 1997). This approach assumes that individuals perceive and interpret things differently and that there are a limited number of ways in which any given phenomenon can be experienced (Brew, 2001). Unlike phenomenology, which takes a first-order perspective by focusing on the participant's lived

experience through narrative descriptions, phenomenography takes a second-order perspective. It does not examine the phenomenon itself but instead looks at the variations in participants' understanding of it (Rolls, 2023). In essence, phenomenography investigates how participants understand and conceptualize their experiences of the phenomenon by exploring questions like "How is it?" or "What do you feel about it?"

This study assumed that adaptive and innovative evalpreneurs will perceive and interpret their problem-solving preferences, identity integration, and coping behavior differently. And so, as a phenomenographic researcher, I began conducting this study by separating the variation in the ways the management of cognitive structure and problem-solving is experienced among the more innovative and adaptive evalpreneurs. As noted by Jobin and Turale (2019) in their study on how to select an appropriate qualitative approach, using a phenomenographic design for this research provided a deeper understanding of (1) individuals' experiences of reality, (2) the unique ways they encounter similar phenomena, and (3) the variations in their experiences through "derived conceptions," which are interconnected in various ways.

Research Design

This study employed qualitative research design, complemented by quantitative survey data and the KAI psychometric inventory to assess individuals' problem-solving styles. The quantitative data were analyzed descriptively, allowing for a richer and more nuanced understanding of the research topic (Decuir-Gunby & Schutz, 2018). The qualitative design approach was chosen to capture the complexity and depth of participants' lived experiences, while the inclusion of quantitative data enriched the analysis by providing a broader context and illuminating the relationships between key variables and participant narratives (Simpson, 2019;

Cresswell & Cresswell, 2020). By integrating both methods, the study aimed to offer a more nuanced understanding of how problem-solving preferences of evalpreneurs and identity factors shaped the behaviors and identity integration. The research design, including the steps taken throughout the data collection and analysis process, is outlined in Table 2.

Table 2

Schematic Representation of the Research Design and Steps

Step 1: Quantitative data collection (RQ1)

Online survey & KAI data on evalpreneurs' characteristics analyzed descriptively.

Step 1A. Online demographic survey
Step 1B. KAI inventory to assess problem-solving styles of evalpreneurs

Data analysis & sampling

Sampling: identify potential participants for in-depth interviews in Step 2

Step 2: Qualitative data collection (RQ2 & RQ3)

Semi-structured interview data on identity integration and coping behavior of evalpreneurs.

Step 2A.
Interview on expressed identity & identity integration
Interview on Coping behavior of evalpreneurs

Step 2B: Data synthesis & analysis

Analytic induction to draw connections and integrate data from Step 1 and Step 2

In the first step of data collection, we collected quantitative data using two primary instruments: KAI and an online survey of identity and demographic characteristics. The purpose of using the KAI was to assess individual differences in problem-solving preferences, describing evalpreneurs as either more adaptive or innovative. The online survey captured detailed demographic information (e.g., gender, age, education, occupational status) and key business characteristics, e.g., sources of income, business size, structure, and variable related to collaborative relationships in evaluation consulting (Maack & Upton, 2006). The online survey

further included factors influencing the way evalpreneurs express their identities and collaborative relationships in evalpreneurship.

The second step of data collection involved qualitative research through semi-structured interviews, aiming at deepening the insights gained from the first step (Cresswell & Cresswell, 2020). Based on their KAI scores, participants were grouped into adaptive and innovative categories. To explore the collective lived experiences and differences between these groups, phenomenography was employed as a qualitative approach (Rolls, 2023). The interviews explored the differences in coping behavior among the adaptive and innovative evalpreneurs and how they integrated various aspects of their identity, especially in their teamwork and interaction via group dynamics.

Data Collection Timeline

The researcher submitted a proposal to the Institutional Review Board (IRB) for approval. The timeline spans from the IRB approval process through completion of the study. A timeline and overview of the data collection process are presented in Table below.

Table 3

Data Collection Timeline

| Date | Data Collection Activity |
|-----------------------------|-----------------------------------------------------------------------------------------------------------------------------------------|
| July 26, 2024 | IRB protocol approval for the pilot study |
| Dec. 24, 2024 | Finalize the development of the purposeful sampling strategy, data collection timeline, and instruments (survey, interview protocol...) |
| Jan. 10, 2025 | Research proposal approval by the dissertation committee |
| December 2024-Jan. 13, 2025 | Amending the IRB protocol based on the approved proposal by the committee and submitting it for approval |
| Jan. 16, 2025 | Amended IRB protocol approval (Appendix A) |

| | |
|-------------------------|----------------------------------------------------------------------------------------------------------------------------------|
| Jan. 17, 2025 | Purposeful sampling strategy initiated via e-mail, LinkedIn, and AEA - Request to sign the consent form sent |
| Jan. 23, 2025 | Invitation to complete the demographic & identity factors survey |
| Jan. 30, 2025 | Invitation to complete the KAI (Unique codes included) |
| Jan. 23- March 20, 2025 | KAI administration and demographic Survey live for responses |
| March 1-30, 2025 | KAI data interpretation and survey data cleaning, management and analysis |
| March 20, 2025 | KAI Feedback workshop session to evalpreneurs the Independent Consulting (IC) Topical Interest Group (TIG) community of practice |
| Jan. 28, 2025 | Pilot test the interview protocol |
| Jan. 29-31, 2025 | The pilot interview reviewed for possible revision to interview protocol and possible inclusion in the data |
| Feb. 18-March 18, 2025 | Invitation to participate in interviews sent and follow up (via emails) to affirm participation and secure time for interviews |
| Feb. 26-March 26, 2025 | Conducting in-depth, semi-structured interviews with evalpreneurs |
| Feb. 27-April 1, 2025 | Transcribe interviews, coding, and analysis of transcripts (Include results in Chapter 4) |
| April 1-13, 2025 | Writing Chapter 5 Conclusion |
| April 23, 2025 | Sharing with committee members content (chapters and sections) |
| April 24 -30, 2025 | Working on dissertation's final draft |
| April 14, 2025 | Final dissertation submitted to Dr. Friedel |
| April 26, 2025 | Sharing the final dissertation with the committee for final reviews |
| April 14-26, 2025 | Finalize the dissertation by addressing comments and feedback |
| May 7, 2025 | Dissertation defense |

Sampling and Recruitment

The targeted participants in this study were evalpreneurs, who operated a formal evaluation business (on a full-time basis) registered as either a profit or nonprofit organization within the United States (Sabarre, 2021). These evalpreneurs held membership in the American Evaluation Association (AEA), and most belong to the AEA's Independent Consulting (IC) Topical Interest Group (TIG) where the researcher also holds active membership.

Recruitment Criteria. Participants were selected based on the following criteria: (1) participants self-identify as an evaluation business owner or co-owner; (2) operate a formal business registered in the U.S.; (3) have a team, or often work in collaborative relationships involving teamwork/group dynamics in their evaluation practice; (4) are willing to share their experiences about their preferences for problem-solving, behaviors, and teamwork/group dynamics experiences; (5) are willing to share their experiences in evalpreneurship in one-on-one confidential interview; (6) agree to complete the KAI.

Sampling. Qualitative research typically employed purposeful sampling methods (Woods-Wells, 2016). Like phenomenological studies, phenomenographic research used criterion sampling to ensure participants have directly encountered the phenomenon being explored (Patton, 2015). This study employed both criterion and convenience sampling strategies to target evalpreneurs the United States (Sabarre, 2021). First, the researcher applied criterion sampling methods; however, to achieve a diverse and robust sample needed for phenomenography, the criterion sampling was supplemented with convenience sampling. Convenience sampling, also referred to as haphazard or accidental sampling, is a nonprobability method where participants are selected based on practical factors such as easy accessibility, proximity, availability, or willingness to participate, rather than random selection (Etikan et al., 2016).

Sample Size. This dissertation study began by first administering an online survey, and then the KAI psychometric measure, with the results guiding the development and recruitment of a purposive sample of evalpreneurs for in-depth semi-structured interviews. The study employed purposeful, convenience sampling to identify approximately 27 already-known small evaluation businesses in the U.S., with additional recruitment through email, LinkedIn, the Independent

Consulting Topical Interest Group of the American Evaluation Association (AEA IC TIG) list server discussion board, and the IC TIG Topic Chat. This approach started with 32 participants were recruited to complete the online survey and invited to complete the KAI.

To provide relevant and in-depth insights, without requiring generalizable findings and ensure a range of diverse perspectives, the study aimed for a balanced representation of both adaptive and innovative evalpreneurs. Of the 32 participants invited to complete the online survey and KAI, 22 had completed the KAI, and 14 participants were identified to continue participation in the semi-structured interviews, six being more adaptive and eight being more innovative. The remaining eight individuals of the 22 participants were not included in the interviews as they either did not complete the KAI in time to schedule an interview, or were unable to schedule an interview before the completion of this study. .

Data Collection Instruments

Demographic and Identity Factors Survey

Online survey data were collected to confirm the demographic characteristics of the study participants, including gender, age, education level, occupational status, country of origin, country of residence/work, and years of experience in evalpreneurship (Sabarre, 2021). These demographic factors informed various aspects of expressed identity, such as education, past experiences, ability, power, gender, socioeconomic status, religion, nationality, and culture (Anderson et al., 2018). Additionally, they reflected elements of cognitive identity, such as attitudes, beliefs, motives, and the specific competencies, knowledge, skills, and aptitudes that evalpreneurs chose to express (Anderson, 2023).

The survey also captured socio-demographic factors that played a key role in shaping the social identity of evalpreneurs, such as motivations, gender, ethnicity, age, occupation, class, and physical attributes (Duening & Metzger, 2017; Radu-Lefebvre et al., 2021). Furthermore, additional data were gathered regarding the collaborative relationships of evalpreneurs, including sources of income, membership in evaluation associations, and business characteristics such as size, age, and structure (Maack & Upton, 2006). This demographic survey provided valuable information not only about the entrepreneurs themselves but also about their businesses, which were used to develop a comprehensive profile of both the evalpreneurs and their business(es).

KAI Inventory

This study measured the unique problem-solving style of participants using the Kirton Adaption-Innovation Inventory (KAI). The KAI assessed evalpreneurs' preferred problem-solving style, which is not related to their skill level, experience, motivation, or behavior. KAI scores ranged from 32 to 160, with a mean score of 91 for females and 98 for males. A-I theory proposed three sub-constructs underlying the problem-solving style differences between more adaptive and more innovative individuals. The KAI was administered through an online psychometric inventory that was scored online. It provided characteristics distinguishing the "more adaptive" from the "more innovative" evalpreneurs.

The KAI total score included three sub-scores. The first was the style of originality (SO), which represented an approach to idea generation as a means of change, ranging from 13 to 65, with a mean score of 41 on the KAI (Kirton, 2011). The second was the style of efficiency (SE), reflecting an individual's method of operating change and problem-solving, ranging from 7 to 35, with a mean score of 19 on the KAI (Kirton, 2011). The third sub-score was the style of rule-group conformity (SRG), which described how individuals managed structure to set the limits of

change, ranging from 12 to 60, with a mean score of 35 on the KAI (Kirton, 2011). The KAI was administered remotely via computer. To maintain researcher impartiality, a separate KAI-certified practitioner (PI) managed the administration and collection of KAI scores, ensuring the researcher remained blind to the results throughout the study.

KAI Instrument Validity and Reliability

According to Friedel (2014) and Brown (2004), the KAI has strong estimates of reliability and evidence of validity as an instrument for differentiating individuals on their adaptive or innovative problem-solving styles. Brown (2004), in his review of the KAI in the Fourteenth Mental Measurements Yearbook, emphasized that the instrument is well-constructed and closely aligned with the principles of the Adaption-Innovation theory. KAI's strong reliability is reflected in its Cronbach's Alpha of .88 for the total score, with consistent sub-scores, and its test-retest reliability of .86 (Friedel, 2014). Its validity has also been supported through statistical factor analysis, confirming that the KAI measures problem-solving style (Kirton, 2011).

Semi-structured In-depth Interview

Semi-structured in-depth interviews were an essential strategy for information gathering in this phenomenographic study (Jobin & Turale, 2019). In this study, qualitative data collection through interviews employed open-ended questions developed in alignment with the research questions and the researcher's priori assumptions, conducted via an online Zoom platform for approximately 60 minutes. This approach allowed participants the time and space to reflect on their perceptions of collaborative identity (Patton, 2015). The interview protocol consisted of two modules. The first module focused on exploring the coping behavior demonstrated by more adaptive and innovative evalpreneurs. As a KAI practitioner and drawing from previous research

on coping behavior (Samms & Friedel, 2013), interview questions were developed to explore the under-studied coping behavior construct and the related constructs, including coping response, coping direction, thoughts and feelings during coping, and external awareness of coping reactions. The second module explored the identity integration of innovative and adaptive evalpreneurs within their teamwork and collaborative relationships in evaluation consulting.

The second module was informed by previous research on identity integration. The interview protocol for this study was developed using a qualitative, identity-based approach grounded in Hammond et al.'s (2017) multi-domain model of leader identity. This framework—comprising four interrelated components: *meaning*, *strength*, *levels*, and *integration*—served as the analytical foundation for constructing the protocol. The primary aim was to explore how evalpreneurs understand and express their leader identities across personal, professional, and social domains. The protocol consisted of seven open-ended questions, each designed to elicit rich, narrative responses aligned with the study's conceptual framework. The first question “Tell me about who you are, your present roles, and your story in becoming an evalpreneur,” invited participants to narrate their journey into evalpreneurship, surfacing early themes of evalpreneur identity formation and personal narratives. The second question “Would you mind telling me about your preferred problem-solving style? How has learning about your KAI impacted your understanding of yourself?” focused on the meaning component of leader identity, connecting cognitive style with self-perception and leadership behavior.

To assess *identity strength*, participants were asked, “How do you see your style useful when working with your team? Do you see it as part of your identity?” This explored how prominently participants perceive their problem-solving style within team dynamics and its significance in their broader identity. The fourth question, “Would you tell me more about your

other ‘I am’ aspects of identity?” addressed the *levels* of identity (individual, relational, collective) by encouraging reflection on multiple roles across business, family, and community contexts. Next, the fifth question, “How do these areas of life influence your collaborative interactions?” extended the relational lens, examining how various life domains shape interpersonal engagements in evaluation work. Question six, “Do you find it easier or harder to integrate those identities, especially when working in teams?” targeted the *integration* component, delving into participants’ ability to harmonize different aspects of self across contexts. Finally, question seven, “Can you share your practical experience about how you integrated two or more of those identities?” offered an opportunity for participants to provide tangible examples of identity integration in action.

Table 4

Research and Interview Questions Aligned with the OSBP Conceptual Framework

| Aspect of the OSBP Model | Interview Questions |
|----------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------|
| Research Question #2: How do the more adaptive and innovative evalpreneurs integrate their identities, especially in teamwork and group dynamics? | |
| Expressed Identity & Introspection | IQ1. Tell me about who you are, your present roles, and your story in becoming an evalpreneur |
| Introspection | IQ2. Would you mind telling me about your preferred problem-solving style? How has learning about your KAI impacted your understanding of yourself? |
| Interpretation | IQ3. How do you see your style as useful when working with your team? Do you see it as part of your identity? |
| Expressed Identity & Introspection | IQ4. Tell me more about your other “I am” aspects of identity that inform how you approach your work as an evalpreneur? |

| Aspect of the OSBP Model | Interview Questions |
|------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| | Research Question #2: How do the more adaptive and innovative evalpreneurs integrate their identities, especially in teamwork and group dynamics? |
| & Interpretation | IQ5. How do these identities influence your collaborative relationships (e.g., with clients, teams, or partners)? |
| Interpretation & Interaction | IQ6. Do you find it easier or harder to integrate your personal and professional identities, especially in teamwork and collaborative relationships? |
| & Introspection | IQ7. Can you share an example of how you integrated two or more identities in practice? |
| | Research Question #3: How are coping behavior evidenced among the more adaptive and more innovative evalpreneurs comparatively? |
| Observed behavior | IQ9. Describe a situation where you had to cope more adaptively or innovatively than your preferred style. |
| & Introspection | IQ9a) How did you know you needed to cope? - |
| Observed Behavior | Follow-up probes from IQ9 |
| Introspection & Interaction | IQ9b) Which direction did you cope more (adaptive or innovative)? IQ9 c) Was it spontaneous or prepared? IQ9d) What did you think about while coping? -IQ9 e) How did it feel? - IQ9f) What would you change in hindsight? IQ9g) Do you think others noticed your coping behavior? Why or why not? |
| Environmental Feedback | |

Data Analysis

Data from the survey and KAI were first analyzed to produce demographic data that informed the qualitative data. Data from each instrument were analyzed using descriptive statistics to compare problem-solving styles, other expressed identities, and demographic characteristics. Quantitative data collection closed by March 30, 2025, and data analysis was completed by April 11, 2025. The KAI inventory was electronically scored through the KAI

Foundation, with both overall scores and sub-scores analyzed to gain insights into the problem-solving styles of evalpreneurs. This analysis helped inform the remainder of the study, exploring how adaptive and innovative evalpreneurs differed in their observed behaviors within evalpreneurship, as well as in their expressed identities, ultimately informing identity integration of evalpreneurs. Analysis of qualitative interview data began with the transcription of audio-recorded interviews via the Zoom platform into verbatim transcripts, which were then thematically analyzed

Thematic Analysis

The thematic analysis for this phenomenographic study was designed to explore how adaptive and innovative evalpreneurs express and integrate their multiple identities, and how coping behaviors manifest in collaborative evaluation settings. To achieve this, the analysis followed a structured, iterative process informed by Jobin and Turale's (2019) seven-step phenomenographic analysis model, alongside analytic induction and constant comparative methods (Simpson, 2019; Yom, 2015). This methodological combination allowed for a nuanced examination of similarities and variations in participants' lived experiences.

Following Jobin and Turale (2019), seven steps guided the phenomenographic analysis of interview data in this study. *Step 1: Familiarization* involved repeated, close readings of verbatim interview transcripts to become immersed in the data and gain a holistic understanding of each participant's narrative. *Step 2: Compilation* included the initial identification and grouping of significant statements, focusing on responses for each interview question by adaptive vs. innovative evalpreneur. During *Step 3: Condensation*, irrelevant or overlapping categories were refined, and core ideas were distilled to highlight the most meaningful aspects of

the data. This was followed by *Step 4: Preliminary Grouping*, where similar categories were clustered together to form initial thematic categories. These groupings served as the foundation for *Step 5: Preliminary Comparison*, where categories were systematically compared across adaptive and innovative evalpreneurs, enabling the identification of both shared experiences and style-specific nuances.

In *Step 6: Naming*, categories were assigned labels that captured the essence of participant responses. Many of these labels, such as *problem-solving style as identity* or *coping direction*, were informed by participants' language, maintaining a strong link between lived experience and analytic representation. Finally, in *Step 7: Outcome Space*, the finalized categories were organized thematically to represent the full spectrum of variation in participants' experiences. The analysis began with *open coding* in Microsoft Word, where key statements were identified and annotated. These initial codes were refined through *focused coding* using Microsoft Excel, where responses were organized by research question, cognitive style (adaptive or innovative), and emerging theme. Comparative tables were used to systematically catalog quotations and patterns across participants.

The thematic coding process resulted in a set of categories that captured key responses to the interview questions for each research question. Codes related to the interview questions on identity integration included *Evalpreneur Identity*, which captured individuals' personal and professional journeys into evaluation consulting; *Expressed Identities*, referring to self-descriptions such as "I am" statements that shape their approach to work; *Identity in Collaborative Relationships*, which reflected how identity influences teamwork and client engagement; and *Identity Integration* and *Identity Integration in Practice*, which described the ease or difficulty of aligning multiple identities in real-world evaluation settings. Concerning

problem-solving style, codes included *Problem-Solving Style* and *Learning KAI and Self-Awareness*, referring to reflections on participants' KAI scores and how these insights influenced their self-understanding. *Style Usefulness in Teamwork* captured how individuals perceived the value of their style in collaborative contexts, while *Problem-Solving Style as Identity* explored whether they viewed their style as a core aspect of who they are.

Codes associated with the interview questions on coping behavior included *Coping Behavior*—referring to moments when participants acted outside their preferred problem-solving style—and related sub-constructs such as *Self-Awareness of Coping*, *Direction of Coping* (adaptive or innovative), *Spontaneous or Prepared Coping*, *Thoughts While Coping*, *Feelings While Coping*, *Reflection on Coping Behavior*, and *External Awareness of Coping*, which collectively explored how participants experienced, reflected on, and interpreted their coping behavior in collaborative evaluation work.

Analytic Induction

To draw connections between expressed (cognitive) identity and social identity factors influencing the identity integration of evalpreneurs, as well as their behaviors, this study employed Znaniecki's analytic induction (Tacq, 2007). This qualitative research method focused on developing and refining theories from empirical evidence drawn from limited cases, allowing for the formulation of hypotheses and adjustments to theoretical frameworks based on specific findings (Ragin, 2023). The approach was used to explore the relationship between problem-solving styles, academic motivation, and identity (Simpson, 2019). Using the analytic induction approach, Simpson (2019) posited that "one's behaviors are indicative of one's problem-solving style and that behaviors varying from style indicate coping fueled by motivation" (p. 62).

Similarly, this study assumed that one's collaborative identity and behaviors were indicative of their problem-solving style and that these factors influenced the interactions of evalpreneurs with others in teamwork and other collaborative relationships in their evaluation business and the environment.

Interview Data Analysis

The qualitative data was coded and analyzed using Excel software which facilitated systematic organization and in-depth examination of emerging themes. This study employed the Marton method of data analysis, one of the two recognized approaches to analyzing phenomenographic data, alongside the Åkerlind method (Åkerlind, 2012). While the Åkerlind method emphasizes the development and depth of individuals' understanding over time (Jobin & Turale, 2019), the Marton method primarily focuses on categorizing experiences. The main differences between the two methods are summarized in the Table below.

Table 5

Key Differences between Marton and Åkerlind methods of data analysis in Phenomenography

| Aspect | Marton Method | Åkerlind Method |
|-----------------------------|-----------------------------------------------------------------------|---------------------------------------------------------------------|
| Focus | Categories of description and variation in experience | Depth and development of understanding over time |
| Analysis Process | Identifying and grouping categories of meaning | Examining the structure and progression of experiences |
| Data Type | Focus on individual statements and instances | Contextual and holistic data, possibly over time |
| Outcome | Categories that represent diverse ways of experiencing the phenomenon | A more nuanced, evolving understanding of the phenomenon |
| Interpretation Level | More deductive, focusing on categorization | More inductive, focusing on development and change in understanding |

According to Table 5, the *Marton method* focuses on identifying categories of experience and grouping participants' responses based on how they perceive a phenomenon, often in a static way. It aims to classify diverse ways of understanding and organizing these differences into clearly defined categories. In contrast, the *Åkerlind method* places more importance on the depth and evolution of individuals' experiences over time (Åkerlind, 2012). This approach looks at how understanding develops and shifts, offering a more dynamic interpretation of how people relate to and interpret phenomena. While Marton's method is more deductive and categorically structured, *Åkerlind's method* is inductive, seeking to understand the progression of experiences and the complexity of how people's perceptions evolve.

By organizing participants' responses based on how they perceive a phenomenon—such as coping behavior, expressed identity, and identity integration, the Marton method identifies distinct categories that reflect the different ways in which adaptive and innovative evalpreneurs understand these experiences. This approach systematically groups the participants' responses, highlighting variations in how they interpret, and engage with the phenomena, and provides a clear framework for categorizing their experiences and perceptions.

Reliability and Validity of the Phenomenographic Results

To ensure the reliability and validity of the findings, this study incorporated several strategies aligned with phenomenographic research (Jobin & Turale, 2019). First, *intercoder reliability* was supported through collaborative engagement with the dissertation committee, who reviewed emerging categories to ensure consistency and accuracy in interpretation. Second, *dialogic reliability* was achieved through regular discussions with committee members, offering methodological and conceptual guidance throughout the data analysis process.

For *pragmatic validity*, the findings were reviewed by both a member of the dissertation committee and an experienced evalpreneur. Their feedback confirmed the relevance and usefulness of the results for the intended audience—evaluation professionals and scholar-practitioners—affirming the practical value of the insights generated. In terms of *communicative validity*, feedback from the dissertation defense led to a refinement of the thematic structure. Themes were modified in response to questions and critiques posed during the presentation, strengthening the alignment between participants' voices and the final interpretations.

Limitations and Delimitations

This study employed a qualitative research design, informed by descriptive quantitative data. While every effort was made to ensure the reliability and accurate interpretation of the data, certain limitations arose. There were no additional resources for verifying the accuracy of the primary data collected for this dissertation through surveys, interviews, focus groups, and KAI data, all of which were self-reported. Additionally, this study involved a small sample of participants from the evalpreneurship field, which is predominantly white (Sabarre, 2021). The study employed a phenomenographic approach, focusing on making comparisons of the expressed identity, behavior, and social identity among innovative and adaptive evalpreneurs, as measured by KAI. A low response to KAI or the absence of a balanced group of adaptive and innovative evalpreneurs could have negatively impacted the study. Although this study focused on problem-solving theory, processes, and styles of evalpreneurs, the development of problem-solving skills fell outside the scope of the research.

Summary

This chapter outlined the research design and methodology, providing a clear rationale for the chosen approach in this phenomenographic study. The study employed a combination of qualitative methods, informed by descriptive quantitative data, to explore the problem-solving styles, identity integration, and behaviors of evalpreneurs, specifically comparing adaptive and innovative individuals in the field. The aim was to understand how evalpreneurs navigate teamwork, group dynamics, and collaborative relationships in evalpreneurship. Data collection involved in-depth interviews, the KAI psychometric inventory, and demographic and identity surveys. These methods were designed to capture the participants' lived experiences and identity-related factors. The chapter also provided a detailed timeline for data collection and outlined the analytical techniques used, including thematic analysis for the qualitative data and descriptive statistics for the quantitative survey data. Additionally, the chapter discussed the pilot testing process, participant recruitment, and sampling strategies. It addressed the researcher's positionality, the study's limitations, and measures taken to ensure the reliability and validity of the findings, contributing valuable insights into the field of evalpreneurship.

Chapter Four

Analysis and Findings

This dissertation study sought to explore the problem-solving styles of evalpreneurs in the US and how they influence coping behavior, as well as how their expressed and social identities intersect in shaping their teamwork and collaborative relationships in evaluation consulting. This chapter presents the findings from the data collected to answer the following guiding research questions: (1) How do evalpreneurs' problem-solving styles and identity

characteristics vary across adaptive and innovative evalpreneurs? (2) How do coping behavior manifest among more adaptive and more innovative evalpreneurs? (3) In what ways do adaptive and innovative evalpreneurs integrate their identities, particularly in the context of teamwork and group dynamics?

Context of the Study- Connecting to the Conceptual Framework

This qualitative research study informed by descriptive quantitative data was grounded in the Organismic Socio-Behavioral Perspective (OSBP) as a conceptual framework by Anderson et al. (2018). The OSBP model is built on a triadic, reciprocal process encompassing *Introspection* or self-analysis, which is the internal reflection through which individuals assess the alignment between their identities, goals, and actions, *Interpretation* or the process by which individuals assign meaning to their identities based on perceived social and professional value, and *Interaction* which is the ongoing negotiations between individuals and their external contexts, capturing the aspect of social identity and group dynamics in teamwork and collaborative interactions (Anderson et al., 2018). Central to the OSBP is *Expressed Identity (EI)*, which is the “I am” aspect of an individual that one chooses to express and how one chooses to be perceived by others in the social environment (Anderson et al., 2018). This EI includes elements of Kirton’s Cognitive Function Schema, namely, what I know (cognitive resource), what I want (cognitive affect), In what way I plan (problem-solving style), At what level I plan (cognitive level) (Kirton, 2011). Another element of the OSBP model is the *Observed Behavior (OB)* which includes both preferred behaviors aligned with one’s natural problem-solving style (adaptive or innovative), and coping behavior, which reflect actions taken outside one’s preferred style to meet external demands (Kirton, 2011). The last element is the *Environmental Feedback (EF)*,

which represents how others respond to an individual's behavior (Anderson et al., 2018). Table in Appendix G outlines how the interview data aligns with the OSBP conceptual framework,

As discussed in chapter three, the research questions and interviews questions aligned with the OSBP model (Table 5) as well as the data analysis and interpretation of the results. For example, research question #1 aligned with the EI and introspection or self-analysis where participants were asked through an online survey to reflect on their demographic characteristics, expressed identity factors, the "I am statement" and KAI results. Research Question #2, aligned with the expressed identity, introspection and interpretation of the OSBP conceptual model (Anderson et al., 2018). More specifically, the interview questions asked participants to reflect on their problem-solving styles which is part of EI (Kirton, 2011; Anderson et al., 2018). Through introspection, participants reflected on their problem-solving styles as adaptive or innovative and through interpretation, they evaluated and assigned meaning to their style as central to their professional identity, particularly in teamwork and collaborative relationships. Through introspection, another interview question asked participants to reflect and describe other "I am" aspects of their identity that they choose to express and be perceived by others (Anderson et al., 2018). Through interpretation, participants evaluated and assigned meaning about the identified identities in teamwork and collaborative relationships, and through interaction, they reflected on the social identity and team dynamics in their collaboration interactions within evaluation consulting. Through introspection, participants reflected on practical experiences on how two or more identities were easier to integrate and complementary (high II) or were in conflicts or harder to integrate (low II) (Cheng et al., 2008).

As for Research Question #3, and interview questions; it aligned with the OSBP conceptual framework, particularly regarding observed behavior—both preferred and coping behavior

(Anderson et al., 2018). Participants engaged in introspection, reflecting on instances when they recognized the need to employ coping behavior. When describing situations where evalpreneurs had to use coping behavior, aspects of environmental feedback (EF) were evident. This EF captured how others, particularly team members and the external environment, responded to an individual's observed behavior. Follow-up interview questions aligned with the observed behavior of the OSBP model as well as introspection and interaction. Through introspection, participants reflected on the coping direction as either adaptive or innovative, the level of preparedness or spontaneity, as well as thoughts and emotional responses of coping. Through interaction, evalpreneurs were asked to reflect on the environmental feedback of their coping behavior, whether or not they think others noticed their coping behavior.

Context of the Study- Methodology

All study participants self-identified as evalpreneurs or leaders of evaluation business and were at various stages of their evaluation consulting business. This qualitative study used phenomenography as a methodological approach to explore the collective lived experiences, similarities, and differences among adaptive and innovative evalpreneurs especially when working in teams and other collaborative relationships in evaluation consulting. This study used a criterion sampling to ensure participants have directly encountered the phenomenon being explored (Patton, 2015), in this case co-founding and leading an evaluation consulting business. Convenience sampling strategies were also employed to target evalpreneurs who operate a formal evaluation business (on a full-time basis) registered as either a profit or nonprofit organization within the United States (Sabarre, 2021).

The study identified and recruited approximately 32 evalpreneurs from the Independent Consulting Topical Interest Group of the American Evaluation Association (AEA IC TIG), after removing ineligible or incomplete surveys. Of the 32 respondents, 30 survey respondents elected to continue the research study and were invited to complete the KAI instruments within the specified timeline for this study. Out of 30 invited participants, 22 completed the KAI instrument, and their KAI scores revealed that 14 were more innovative with KAI scores ranging from 101 and 150, six were adaptive with KAI ranging from 78 to 83, while two were in the middle of the continuum with KAI scores of 90 and 91. In the final interview sample, six adaptive evalpreneurs participated, while eight innovative evalpreneurs attended the interviews. Throughout this analysis, the KAI results serve as a foundational element, connecting with the qualitative findings to provide insights into how multiple identities are integrated and how coping behavior manifest among both adaptive and innovative evalpreneurs.

Survey and KAI Data Analysis

This chapter begins with a detailed presentation of the descriptive analysis of demographic data, followed by an in-depth analysis of the KAI results to answer the research question one, “*What are the problem-solving styles of evalpreneurs, identity factors and demographic characteristics?*” This research question aligned with the expressed identity and introspection of the OSBP model, where participants were asked through an online survey to reflect on their demographic characteristics, expressed identity factors, the “I am statement” and their problem-solving styles (cognitive effect) (Anderson et al., 2018).

Demographic Survey Results

The demographic survey was organized into three distinct modules. The first module asked participants to provide detailed demographic characteristics, including their years of experience in the evaluation field, the number of years they had been operating as an evalpreneur (based on the year they formally registered their evaluation business), as well as their age, education level, gender, race and ethnicity, professional field, and geographical location of their evaluation business. The second module focused on collaborative relationships in evalpreneurship, while the third module explored the factors influencing how evalpreneurs express their identity and engage in interactions with others

Demographic and Identity Factors of Evalpreneurs

Among the evalpreneurs who completed the survey ($n = 32$), the majority were female ($n = 30$), with a smaller number of male participants ($n = 2$). Participants' ages ranged from 29 to 70 years. The sample was predominantly White ($n = 26$), with smaller groups identifying as American Indian ($n = 2$) and Hispanic or Spanish ($n = 1$). The educational background of the participants was highly diverse, with most holding a master's degree ($n = 22$) in fields such as Public Administration, Program Evaluation, Public Health, Social Sciences, and other related professions. Additionally, a smaller subset of participants ($n = 6$) held Doctorate degrees, in fields such as Education, Social Sciences, and program evaluation. Regarding experience in the evaluation field, participants reported a wide range of years, from 1 to 5 years ($n = 3$), with the majority ($n = 17$) having 5 or more years of experience.

As evalpreneurs, participants had been running their businesses anywhere from 2 to 24 years, with a significant portion having extensive experience in leading their evaluation

consulting firms. The majority of participants ($n = 15$) led businesses with 5 or more staff members, while a smaller group were solopreneurs ($n = 8$) and others grew small businesses with 1-4 full-time staff ($n = 7$). The geographical distribution of the participants' evaluation businesses spanned various U.S. states, with notable concentrations in California ($n = 6$), Minnesota ($n = 4$), and other states such as Alaska, Virginia, and Louisiana. Professionally, the evalpreneurs represented a wide range of fields, including Public Administration, Social Sciences, Education, and Program Evaluation. Overall, the sample reflects a highly educated, predominantly female group of evalpreneurs, with a strong presence across various sectors within the evaluation profession.

Collaborative Relationships in Evaluation Consulting

The second module of the survey focused on collaborative relationships within evalpreneurship. As shown in Table below, the survey results provide valuable insights into the collaborative dynamics, business characteristics, and professional relationships of the evalpreneurs, highlighting several key trends.

Table 6

Survey results on Collaborative Relationships in Evaluation Consulting (n=30)

| Variable | Number | Percentage |
|-----------------------------------------------------------------------------------------------------------------------------------------------|--------|------------|
| Years of experience in evaluation (Mean=3.67, SD=1.18) | | |
| 0-5 years | 1 | 3.33 |
| 6-10 years | 4 | 13.33 |
| 11-15 years | 9 | 30.3 |
| 16-20 years | 6 | 20.00 |
| 21+ years | 10 | 33.33 |
| Have a team, or often work in collaborative relationships involving teamwork/group dynamics in your evaluation practice? (Mean=1.00, SD=0.00) | | |
| No | 0 | |
| Yes | 30 | 100 |
| Number of employees (full time) (Mean=2.67, SD=1.30) | | |
| None | 8 | 26.67 |
| 1-2 | 7 | 23.33 |
| 3-4 | 2 | 6.67 |
| 5 or more | 13 | 43.33 |
| Ever subcontracted or partnered with another consultant or business (Mean=1, SD=0.00) | | |
| No | 0 | 0 |
| Yes | 30 | 100 |
| Number of collaborations had in the past year (Mean=3.07), SD=0.78) | | |
| None | 0 | 0 |
| 1-2 | 8 | 26.67 |
| 3-4 | 12 | 40.00 |
| 5 or more | 10 | 33.33 |
| Ever contracted or partnered with a consultant or business to increase diversity (Mean=1.57, SD=0.57) | | |
| No | 14 | 46.67 |
| Yes | 15 | 50.00 |
| No response | 1 | 3.33 |

A majority of participants have extensive experience, with over 21 years in the evaluation field (33%), while others have between 6-10 years or 11-15 years (30.3%) of experience. Fewer participants have 16-20 years (20%) or less than 5 years (3.33%) of experience. All participants (100%) reported working in collaborative relationships, highlighting the importance of teamwork and group dynamics within their evaluation practices. Additionally, 26.67% of evalpreneurs have

no full-time employees, while 23.33% have 1-2 and 6.67% employ 3-4 full-time staff members. Furthermore, every participant (100%) has subcontracted or partnered with another consultant or business, demonstrating a widespread approach to collaboration. Regarding recent collaborations, 40% of participants had 3-4 collaborations in the past year, while 33.33% had 5 or more, and 26.67% reported 1-2 collaborations. Lastly, half of the participants (50%) have partnered with others to increase diversity, while 46.67% have not, and 3.33% did not respond. These findings reflect a strong emphasis on collaboration, diversity, and varied organizational structures among evalpreneurs.

Identity Factors of Evalpreneurs

The third module of the online survey aimed to explore the factors influencing how evalpreneurs express their identity and engage in interactions within evalpreneurship. Respondents rated the relevance of various identity factors, with options ranging from 1 (Not relevant at all) to 5 (Not Applicable) (Table 7).

Table 7

Factors influencing the way evalpreneurs express their identity (n=30)

| Identity factors | 1= Not relevant at all | 2= Not very relevant | 3= Somewhat relevant | 4= Very relevant | 5= Not Applicable |
|-----------------------------------------------|------------------------|----------------------|----------------------|------------------|-------------------|
| Educational background | 0 (0%) | 2 (6%) | 10 (33%) | 18 (60%) | 0 (0 %) |
| Previous professional or personal experiences | 1 (3%) | 0 (0%) | 0 (0%) | 28 (93%) | 1 (3%) |
| Skills and abilities | 0 (0%) | 0 (0%) | 2 (7%) | 27 (90%) | 1 (3%) |
| Authority or influence in your field | 1 (3%) | 9 (30%) | 11 (37%) | 9 (30%) | 0 |
| Gender identity | 5 (16%) | 4 (13%) | 17 (55%) | 4 (13%) | 1 (3%) |

| | | | | | |
|------------------------------------|----------|---------|----------|---------|--------|
| Social class background growing up | 5 (17%) | 9 (30%) | 11 (37%) | 4 (13%) | 1 (3%) |
| Religious or spiritual identity | 17 (51%) | 7 (22%) | 5 (16%) | 2 (6%) | 1 (3%) |
| Ethnicity or racial identity | 5 (17%) | 3 (10%) | 16 (53%) | 6 (20%) | 0 |

Out of 30 surveyed evalpreneurs, educational background emerged as highly relevant to most participants, with 18 (60%) rating it as very relevant and 10 (33.33%) considering it somewhat relevant. This indicates that educational experiences play a significant role in shaping evalpreneurs' professional identities. Previous professional or personal experiences were also seen as extremely relevant, with 28 (93.33%) participants rating this factor as very relevant, highlighting its importance in shaping how evalpreneurs engage in the field. Skills and abilities were considered crucial by most respondents, with 27 (90%) rating this factor as very relevant, underscoring the importance of personal competencies in defining an evalpreneur's role identity. Regarding authority or influence in the field, responses were more varied. Nine (30%) participants rated it as somewhat relevant, while 9 (30%) found it very relevant, indicating that authority or influence is a factor, though its importance differs across evalpreneurs.

Gender identity was rated as somewhat relevant by 17 (56.67%) participants, with 5 (16.67%) rating it as not relevant at all. Social class background as becoming a young adult also showed a mixed response, with 11 (36.67%) participants considering it somewhat relevant and 9 (30%) rating it as not very relevant. Religious or spiritual identity was considered not relevant at all by 16 (53.33%) participants, with only 2 (6.67%) considering it very relevant. This suggests that spiritual or religious beliefs are not significant influences on professional identity for most evalpreneurs. Ethnicity or racial identity was found to be somewhat relevant by 16 (53.33%) participants and very relevant by 6 (20%), indicating that racial or ethnic identity does play a role

in interactions within the field, but not as significantly as factors like professional experience and skills.

The surveyed evalpreneurs further identified additional factors influencing how they express their identity and engage in evalpreneurship. One evalpreneur highlighted the importance of "relations and connections" with others, emphasizing how these networks shape their professional identity and interactions. Others discussed their backgrounds in informal education and facilitation, with one participant mentioning their "personal background as a first-generation college student," pointing to the personal experiences that influence their approach to evaluation. Geographic and community factors were also significant. For instance, an evalpreneur noted their "US Midwest background" and "small business owner" experience, emphasizing how local context and entrepreneurial roots shape their professional journey. Another evalpreneur discussed their experience working in various sectors outside of evaluation, such as "nonprofit advocacy, international development, and academic research," illustrating the diverse skill set and perspectives that contribute to their professional identity.

Roots in "social justice" were also highlighted, with one participant noting how their "commitment to equity and justice" guided their work in evaluation. This was paired with a focus on "client relationships" and a strong sense of "values" that shape their work and approach to collaboration. Personal factors, such as "age," "political and economic views," and a "desire for autonomy" also emerged as important influences on identity. One evalpreneur reflected on their "ability to control their time" and the "love of the field," suggesting that autonomy and passion are central to their professional experience. The role of professional organizations was noted by another evalpreneur, who highlighted their involvement in the "American Evaluation Association

and Nonprofit Consultants Network”, which reinforces how professional networks contribute to shaping an evalpreneur's identity and career.

Specialty skills were another significant factor, as one evalpreneur emphasized their ability to "complete tasks quickly with little to no red tape," showcasing how efficiency and specialized skills contribute to their identity as an evalpreneur. Additionally, a focus on "culture, language, community, governance and legal sovereignty" reflected how values tied to cultural and community dynamics shape their work. Finally, the influence of being a parent was noted by one evalpreneur, who explained, "relationships and networks I belong to, where I live and work (Los Angeles), and that I am a mother of young children," illustrating how personal roles and family responsibilities intersect with professional identity. Another evalpreneur emphasized the importance of "client perspectives and feedback," noting how their rural location also plays a role in shaping their approach to evaluation.

The “I am statements”: Personal, relational, and collective Identity of evalpreneurs

The findings from the “I am...” statements in the demographic survey—adapted from the Twenty Statements Test (Kuhn & McPartland, 1954), show a rich nature of evalpreneurs’ expressed identities while in leadership of their evaluation consulting business. This reflective exercise prompted participants to complete the phrase “I am...” multiple times, allowing them to reflect on their *personal*, *relational*, and *collective* identity across life domains.

At the *personal level*, both adaptive and innovative evalpreneurs described themselves through individual traits, roles, and internalized values, such as “a mother” ($n = 15$), “a business owner” ($n = 14$), “a problem solver” ($n = 12$), and “an evaluator” ($n = 18$). They also self-described as “privileged” ($n = 8$), “educated” ($n = 10$), and “driven” ($n = 7$), which suggests that

this sense of self-awareness and personal agency inform their evalpreneurs' expressed identity. On the *relational level*, many participants defined themselves in terms of interpersonal relationships, such as "a wife" ($n = 13$), "a daughter" ($n = 10$), "a mentor" ($n = 9$), and "a business partner" ($n = 11$), which demonstrates the significance of relational ties in shaping how evalpreneurs express their identity. These identities underscore how family dynamics, mentorship, and professional collaboration contribute to their evaluation practice.

At the *collective level*, participants expressed strong affiliations with broader communities, movements, and professional networks. Many identified with values-based and advocacy-oriented roles, using terms like "a social justice advocate" ($n = 9$), "an ally" ($n = 7$), and "a feminist" ($n = 6$), which reflect a commitment to equity, inclusion, and systemic change. Others named formal affiliations, such as "a participant in the American Evaluation Association" ($n = 8$), "a member of a cooperatively owned business" ($n = 4$), and "a collaborator with nonprofit organizations" ($n = 10$), highlighting how collective belonging and professional communities support both identity development and values-driven leadership. Together, these responses demonstrate that evalpreneurs' expressed identities are not solely defined by their roles as business owners or evaluators but are deeply interwoven with personal values, relational roles, and collective commitments. Their identities are fluid, reflective, and integrative constructed through lived experience and sustained through interaction with others and engagement in communities of practice. This further suggests that leading an evaluation business involves navigating through multiple identities that may be integrated easily or not depending on how complementary or they are in conflict (Cheng et al., 2008).

Kirton Adaption-Innovation Inventory (KAI) results

The KAI psychometric inventory was used to quantitatively measure the problem-solving styles of each participating evalpreneur in the study. Knowledge of participants' KAI scores was used to strategically recruit and group evalpreneurs into adaptive and innovative problem-solving styles. This grouping enabled a comparative exploration of their collective lived experiences through interviews. Out of the 32 survey participants, 22 completed the KAI psychometric measure. The overall KAI scores of these participants ranged from 78 to 150, reflecting a broad continuum of problem-solving preferences, ranging from more adaptive to more innovative styles. The mean KAI score for the group was 107.86, which is 12.86 points more innovative than the general population mean for males (98) and 16.86 points more innovative than the general population mean for females (91) (Kirton, 2011). The standard deviation for this sample was 21.00, indicating a wide variation in problem-solving preferences among the participants.

Table 8

Evalpreneurs' KAI scores and sub-scores

| | Average Adaptive (<i>n</i> =8) | Average Innovative (<i>n</i> =14) | Sample Mean | Standard Deviation |
|--------------------------------|------------------------------------|---------------------------------------|----------------|--------------------|
| Total KAI Score | 78.00 | 150.00 | 107.86 | 21.00 |
| Originality (SO) | 30.00 | 62.00 | 46.81 | 9.65 |
| Efficiency (SE) | 10.00 | 31.00 | 18.90 | 6.59 |
| Rule/Group Conformity (SRG) | 27.00 | 58.00 | 42.13 | 7.17 |

As Table 4 illustrates, eight participants were more adaptive evalpreneurs, with KAI scores ranging from 78 to 91, while 14 evalpreneurs were more innovative with KAI scores

ranging from 102 to 150. As presented in the following sections, to protect participants' anonymity, pseudonyms were assigned based on the meanings or cultural significance of their first names. This approach ensured confidentiality while maintaining meaningful identification, in line with ethical guidelines for privacy and research integrity.

Characteristics of Adaptive and Innovative Evalpreneurs

The KAI total score represents an individual's overall preference along the continuum between more adaptive and more innovative problem-solving styles (Kirton, 2011). Kirton (2011) defined this continuum, with more adaptive individuals emphasizing structure, stability, and incremental improvements, while those with more innovative tendencies favor flexibility, risk-taking, and transformative change. Understanding where evalpreneurs fall on this continuum was essential for recognizing how they prefer to manage change, make decisions, and show creativity and problem-solving in their evaluation consulting business. For example, evalpreneurs with more adaptive styles, such as Clara (KAI = 78), Serena (KAI = 79), Melody (KAI = 79), Clarisa (KAI = 80), Mira (KAI = 82), and Vivienne (KAI = 83), their problem-solving approach tends to be more methodical and detail-oriented, reflecting a preference for gradual and practical changes. These individuals are focused on refining and improving existing systems, ensuring that any modifications made are manageable and sustainable (Friedel, 2014). Their more adaptive KAI scores, ranging from 78 to 91, suggest a deep-rooted preference for stability and structure, which is enabling to them to operate within consensually agreed frameworks. For instance, the strongest adaptive from the group, Clara with a KAI of 78, prefers to make small, incremental improvements that maintain the integrity of existing processes, ensuring that any changes are carefully tested and implemented.

At the innovative end of the KAI continuum were evalpreneurs like Victoria (KAI=102), Rhea (KAI=103), Lena (KAI=109), Zane (KAI=116), Ella (KAI=116), Skylar (KAI=117), Livia (KAI=121), Sage (KAI=122), Lucia (KAI=124), Brooke (KAI=125), Faye (KAI=127), Lila (KAI=132), Tara (KAI=147) and Grace (KAI=150). These represent a more innovative problem-solving style, with scores reflecting a preference for unstructured environments and a readiness to embrace risk (Kirton, 2011). These individuals accept more ambiguity, actively seeking opportunities to disrupt and reimagine existing systems. With stronger innovative KAI scores, they are driven by bold, transformative ideas and are motivated by the potential to bring revolutionary changes (Friedel, 2014). For instance, Grace's score of 150 highlights her inclination towards groundbreaking innovations that push the boundaries of conventional thinking, demonstrating a willingness to challenge norms and pursue high-risk, high-reward solutions (Kirton, 2011).

KAI Sub-scores results

The analysis of KAI sub-scores, namely, *Style of Originality (SO)*, *Style of Efficiency (SE)*, *Style of Rule-group Conformity (SRG)*, provides deeper insights into the problem-solving styles of adaptive and innovative evalpreneurs. Adaptive evalpreneurs, with KAI scores ranging from 78 to 83, exhibit distinct characteristics across the three KAI sub-scores. In terms of the *SO*, their scores range from 30 to 41, with a mean of 36.33. These relatively more adaptive scores indicate a preference for a smaller number of more practical, tested methods of idea generation (Kirton, 2011; KAI Foundation, 2022) For *SE*, adaptive evalpreneurs scored between 10 and 24, with a mean of 16.33, reflecting a highly methodical and detail-oriented approach to problem solving (Friedel, 2014). These evalpreneurs tend to favor structured, step-by-step problem-solving processes, emphasizing practicality (Kirton, 2011; KAI Foundation, 2022). Finally, their

SRG scores ranged from 27 to 43, with a mean of 31.83, suggesting a moderate adherence to established norms and a preference for solutions that respect group consensus and authority (Kirton, 2011; KAI Foundation, 2022).

In contrast, innovative evalpreneurs, with KAI scores ranging from 102 to 150, their *SO* scores range from 51 to 62, with a mean of 56.91, reflecting a strong inclination toward generating more ideas, which may be perceived as unconventional (Kirton, 2011). These individuals tend to focus on challenging the current system and are more likely to propose disruptive solutions. Their *SE* scores range from 10 to 31, with a mean of 22.36, indicating a preference to think more broadly with tangential views and consideration of unconventional approaches (Kirton, 2011; KAI Foundation, 2022). Lastly, the *SRG* scores of innovative evalpreneurs range from 36 to 58, with a mean of 45.18, signifying a stronger tendency to disregard established structures and conventions compared to adaptive evalpreneurs, with consideration of revolutionary change.

Comparing evalpreneurs' problem-solving styles with demographics

Out of the twenty-two evalpreneurs who completed the KAI, only fourteen participants responded to requests to schedule an in-person interview. Demographics of the resulting final sample size of fourteen interviewees are detailed in Table 9. For anonymity, pseudonyms—drawn from the root meanings of their first names, were used to refer to each participant.

Table 9

Demographics of the interviewed evalpreneurs (N=14, 8 Innovative and 6 Adaptive)

| Pseudonyms | Occupational status | Demographic (Age, Education, and years as evalpreneur) | KAI sub-scores | KAI Scores |
|-------------------|------------------------------------|---------------------------------------------------------------|---------------------------|-------------------|
| 1) Clara | Co-Founder & COO | Age: 34 Education: PhD Years: 3 | SO: 36 SE: 10 R: 32 | 78 |
| 2) Serena | Principal | Age: 65 Education: MDiv Years: 15 | SO: 33 SE: 13 R:33 | 79 |
| 3) Melody | President & Principle Investigator | Age: 40 Education: MS Years: 6 | SO:37 SE: 15 R: 27 | 79 |
| 4) Clarisa | Managing director | Age: 51 Education: Bachelor Years: 14 | SO: 30 SE: 12 R: 38 | 80 |
| 5) Mira | Program Evaluation Consultant | Age: 70 Education: Masters Years: 3 | SO:38 SE: 11 R: 33 | 82 |
| 6) Vivienne | Founder and Principal Consultant | Age: 53 Education: PhD Years: 8 | SO: 41 SE:12 R: 30 | 83 |
| 7) Zane | Firm Director | Age: 54 Education: PhD Years: 16 | SO: 51 SE: 20 R: 45 | 116 |
| 8) Ella | Management Team & Worker-Owner | Age: 38 Education: MS Years: 13 | SO: 48 SE: 24 R: 44 | 116 |
| 9) Skylar | President | Age: 47 Education: MS Years: 15 | SO: 49 SE: 18 R: 50 | 117 |
| 10) Sage | Co-Executive Director | Age: 57 Education: MS Years: 8 | SO: 51 SE: 23 R: 48 | 122 |
| 11) Lucia | Co-Executive Director | Age: 52 Education: MS Years: 8 | SO: 54 SE:25 R: 45 | 124 |
| 12) Brooke | Founder and Principal | Age: 49 Education: MS Years: 18 | SO: 53 SE:27 R: 45 | 125 |

| | | | | |
|----------|----------------------------------|--------------------------------------------|---------------------------|-----|
| 13) Faye | Founder and Principal Consultant | Age: 47 Education: PhD Years: 4 | SO: 55 SE: 23 R: 49 | 127 |
| 14) Tara | Principal & Consultant | Age: 47 Education: Master's Years: 4 | SO: 62 SE: 31 R: 54 | 147 |

Note: KAI Mean score= 107.79, KAI range: 78-147, SD= 21.9

Interview Findings on Coping behavior and Identity Integration

As an introduction to the interview, each participant was asked to share their narratives about who they are, their roles, and their story of becoming an evalpreneur. This question was aimed at providing context for the remaining interview findings, it explored how participants' identities as evaluators and entrepreneurs intersected into "evalpreneur identity". The interview protocol also included an introductory question regarding participants' reflections about their problem-solving styles as well as how learning their KAI scores impacted their understanding of their evalpreneur' identity. The findings contribute to the Research question "*How do evalpreneurs' problem-solving styles and identity characteristics vary across adaptive and innovative evalpreneurs?*"

Select Participants' Narratives about Their Journey to Become an Evalpreneur

Innovative Evalpreneurs Narratives

Evalpreneur Lucia (KAI position=124). Lucia is a 52-year-old white woman with over 21 years of experience in the evaluation field. In 2017, she launched her evaluation consulting firm. She holds a master's degree in public administration. As the owner of her business, Lucia manages a team of more than five full-time staff members and collaborates with subcontractors, partners, and other stakeholders in the evaluation consulting space. Her journey to becoming an

evalpreneur is deeply rooted in her personal experiences. Growing up in a diverse environment, she was exposed to a wide range of perspectives, which opened her eyes to the inequities in the world. This awareness ignited her passion for social justice, particularly in efforts aimed at supporting marginalized communities. As she reflected on her path, Lucia shared,

Originally, I was a math major but during college, but was drawn to the understanding of communities, and I ended up earning my degree in anthropology. After graduation, I worked in various nonprofit organizations and then transitioned to a role as a research assistant in the field of evaluation and learning. That's when I realized I had found my niche—I loved conducting research, but more than that, I loved gathering data and feedback that could help people to lead social change efforts, improve their work, and reach more people. I spent time working in academia, nonprofits, and even in a corporate consulting firm. Then, after a while, I decided to take the plunge and start my own business, eight years ago. It's a smaller evaluation and learning firm that focuses on advancing equity in evaluation and philanthropy.

Evalpreneur Brooke (KAI position=125). Brooke is a 49-year-old white woman who has been working in the evaluation field for more than 21 years and started her evaluation consulting firm in 2007. She holds a master's degree evaluation. When asked to state the "I am" statements in a demographic survey, Brooke noted, "I am an entrepreneur, an evaluator, a leader, and a female business owner." For Brooke, becoming an evaluator and finding a niche in evaluation consulting, aligned with her unique skills and values. Brooke narrated her story:

I first encountered evaluation in graduate school. At that time, I realized that the jobs I was interested in required a master's degree, so I decided to pursue one. Along the way, I took a program evaluation course, and that's when my journey began. It was like a lightning bolt struck in the middle of the room as I learned about the field of evaluation. This was back in 2002 or 2003 when the field was still relatively young. I was grateful to find an area of practice that aligned so perfectly with my skills and values

For Brooke, becoming an evaluation entrepreneur was far from accidental. She shared, "My parents were entrepreneurs, and most of my family members have had their own businesses." She went on to explain that she first realized not all adults worked for themselves when she was about 10 years old, as everyone in her circle was self-employed. Brooke reflected

on running various small businesses throughout high school and college, which made entrepreneurship a constant presence in her life. She added, "One of my professional dreams has always been to start my firm," noting that she had long envisioned carving out a unique niche in the business environment for evaluation consulting."

Concerning how her role has evolved through time and the team growth, Brooke mentioned:

I started the evaluation firm in 2007, and now we are a team of 17 people, including myself. We've maintained this size for about two years now. Before that, we had around 12 team members for a long time, but in the last few years, we've grown to 17. This growth has been significant, and it transformed how we work and communicate as a team. As we've grown, my role has changed significantly over the last 18 years. Our firm has expanded, and we've developed more specialized roles. I've learned a lot through this process, and I've come to embrace my strengths even more. I've also learned to trust my colleagues, who bring different energy and strengths to the table. Together, we complement each other and work toward shared goals.

Evalpreneur Faye (KAI position=127). Faye began her career in youth development, running youth programs, and focusing on junior high and high school students. After about six years, She wanted to deepen her practice, so she went back to school for a Master's in Youth Development. While there, she participated in an evaluation of local libraries, which sparked her interest in incorporating evaluation and research into her work. This led her to pursue a PhD in Education and started teaching at the University of Minnesota's Youth Studies program for about ten years. After graduating, Faye took on a role as a qualitative researcher and later became a research scientist at a nonprofit that supports youth development nationally. Faye had extensive experience working on large projects and leading research in the field of youth development.

However, when the pandemic hit in 2020, she, along with many of her colleagues, was laid off. :

Initially, I wasn't thinking about consulting, but as a qualitative researcher, I began interviewing people across various state agencies, nonprofits, and universities—to understand the landscape and explore what was out there. Through these conversations, I realized that independent consulting could be the right fit for me since I didn't want to be

in a traditional boss-employee dynamic. So, I started my consulting journey by taking on a project with the National Youth Serving Organization, which went well. It snowballed from there, and now, I'm celebrating four years of running my own evaluation business, where we support youth-serving organizations with research and evaluation. Our focus is on helping them tell their stories of impact and use data to drive innovation.

Evalpreneur Zane (KAI score=116). Zane has over 21 years of experience in evaluation and managing teams. He initially started in higher education but realized it was not the path he wanted to follow long-term, so, joined a consulting firm focused on higher education, particularly in research. From there an opportunity to pursue higher education unfolded. Zane reflected,

As a graduate student, I found there was not much guidance and often felt like I was just left to figure things out on my own. So, I took it upon myself to track my time, much like I had done as a consultant. I started organizing my work in terms of evaluation, and in hindsight, which is when I began thinking of the idea of consulting, even before I considered it as a possibility. I eventually left my PhD program and transitioned to institutional research, where I became the lead data analyst at a university. During that time, someone asked me to help with a program evaluation for a project. I was paid extra, and I took the opportunity. They liked my work and asked if I would be interested in writing more grants. One thing led to another, and I started taking on more side projects. It became a snowball effect, and eventually, I had to leave my full-time job and start my evaluation Consulting firm.

Starting this evaluation consulting firm was a "one-person operation," for about nine years. Zane explained, "when I realized that I needed more variety, I hired my first employee. Since 2019, over the past five and a half years, the firm and projects kept growing to reach about 16 employees today". As Zane further noted, his current role is focused on managing the workflow, overseeing invoicing, and contracting, and managing larger strategic issues. His team is working on around 68 projects with 44 clients and was expecting to reach over \$2 million in revenue this year had there not been radical changes in federal funding.

Evalpreneur Ella (KAI position =116). Ella's story is unique, it reflects her personal growth within the company but also illustrates how the shift to a worker-owned cooperative has

transformed both her role and her professional identity as an evalpreneur. She started as an intern 14 years ago in an evaluation consulting firm but a year and a half ago, she transitioned from an employee to a worker-owner in the same firm. As Ella explained,

I am an evalpreneur working in a worker-owned cooperative evaluation firm. This means that after employees go through a few steps, they have the opportunity to become worker-owners and take part in the decision-making process. Right now, 17 out of our 19 eligible employees are worker-owners. We all help make important decisions like the budget and elect the board of directors. This gives you a sense of how decisions are made across the company. In addition to consulting on evaluations, I'm also part of the management team. While I still provide consulting services, I also help with daily decisions that affect the organization. My role includes supporting decisions brought to our worker-owners and staff.

As Ella shared, her firm, which specializes in evaluation, planning, and facilitation, was founded by a sole owner in 2010. In August 2023, the company made the shift to a worker-owned cooperative model. Similar to other types of cooperatives, like producer co-ops in agriculture, the worker-owned model operates on the principle of collective ownership and decision-making. Each member has one vote, ensuring decisions are made democratically and that everyone has a voice in how the company's success is distributed, Ella explained.

Evalpreneur Skylar (KAI position=117). Skylar started her career 15 years ago as an independent consultant. She was doing more general consulting, not necessarily evaluation work but over time, she realized that there was a need to take on bigger projects, and that meant having a team. That was when she had to choose what kind of business she wanted and the type of work and focus. Skylar mentioned.

So, I shifted my focus, started building a virtual team which has now grown up to ten people from across five states across different time zones. We manage a wide variety of research, evaluation, and planning projects. We are a team of 10, and we're completely virtual. I have had people in the office before, but now, everyone works remotely from different states, across different time zones. It has been an exercise in creativity and innovation to stay connected and make sure we're working effectively, especially since

we're working with a variety of cultures and clients. For example, I'm based in Alaska, and we do a lot of work with tribes and in Hawaii, where there's a large immigrant and Native Hawaiian population.

Evalpreneur Tara (KAI position=147). Tara has been in the evaluation field for about 14 years now, but it's her second career- she started in theater and spent a lot of time building museum exhibits. She reported going back to grad school and got involved in evaluation almost by accident because a colleague suggested evaluation, and she fell into the field. Tara reported,

For most of my career, I have been a consultant. I worked at a consulting firm for seven years before branching out and starting my own business three and a half years ago. In my business, I do a mix of evaluation, strategic project management, and organizational development support, primarily for government, nonprofit organizations, and foundations. It is just me running the business, but I work with a small team of consultants who each have their own companies. I collaborate regularly with three of them who subcontract for me, and I subcontract work back to them. This way, we are able to work together while maintaining our independence.

Adaptive Evalpreneurs Narratives

Accidental Evalpreneur Clara (KAI position= 78). Clara is a business partner and the Chief Operating Officer (COO) at an evaluation consulting firm. She has held this role since 2023 but has collaborated closely with the founder since 2020, even before the firm was established in 2018. Their relationship began in graduate school, where they were peer mentors and mentees, then friends, and now business partners. Clara shared,

My journey to evalpreneurship was very accidental. My business partner and founder wanted to grow her own business, but that was never my intention. I always say that I am an intentional evaluator because I knew from early on that I wanted to work as an evaluator, but I am an accidental entrepreneur. However, I will say entrepreneurship runs in my family. Both of my grandparents, on both my mum's and dad's sides, were entrepreneurs. Now that I have become an evalpreneur, it is incredibly fulfilling. I love growing our team, I love evaluation, I love our clients, and I am proud to have become an evalpreneur (Clara, Personal Communication, 2025).

Evalpreneur Vivienne (KAI position=83). Vivienne started her consulting firm about seven and a half years ago. She’s been working in evaluation for about twenty years. Vivienne reported, “I decided to found an evaluation consulting firm that aligned more with my community-based values rather than what felt like an ivory tower approach.” “For me to function authentically in the world, I needed to create something that matched how I operate—flexible and community-centered,” she explained.

Evalpreneur Melody (KAI Position= 79). Melody is a PhD student in program evaluation at Claremont Graduate University. After finishing my coursework, I started my evaluation firm, she noted. The firm was originally co-founded with a colleague from Claremont, but he left because he wanted more structured and predictable pay. So, Melody does not have full-time staff but hires subcontractors for specific projects and collaborates with other evaluators on various projects. Reflecting on collaborative relationships, Melody noted,

I partner with different people depending on the project’s needs, which keeps things dynamic and interesting. I primarily work with smaller nonprofit organizations, particularly in education, museum, and environmental spaces. I enjoy the relationships I build with my clients. My practice focuses on capacity building, helping my clients think evaluatively rather than just meeting a funder's requirements. For instance, instead of just saying, "We need to do a survey," I encourage clients to think about their theory of change, ask what they want to achieve, and focus on decision-making for the future.

Evalpreneur Serena (KAI position=79). Serena started her career as a lawyer, which laid the foundation for everything that followed. She mentioned that she spent a brief period as a lobbyist in Washington, DC, primarily focusing on legal writing. She then worked for a U.S. senator in the early 1990s, where she focused on immigration and refugee policy—an area she remains deeply enthusiastic about. Serena further explained

From there, I transitioned into the non-profit sector, where I took on roles managing human rights projects. One of the most impactful experiences was supervising a program

that supported young lawyers who represented immigrants in detention. This experience fueled my commitment to advocacy, and I later collaborated with Physicians for Human Rights on two key issues: immigration detention and the broader issue of national security detention, including investigations into the complicity of health professionals in torture during the George W. Bush administration. Many of my former colleagues in human rights, who were familiar with my expertise, reached out because they were interested in having evaluations done for their projects. I took this opportunity to dive into the world of evaluation. My first significant evaluation was for one of the leading migration policy think tanks in the U.S., based in Washington, DC. Shortly after, I worked at a major evaluation firm, a key advocacy organization for the immigrant youth movement in the U.S. From there, I slowly but steadily grew into the field of advocacy and policy evaluation

What's unique about Serena's journey to becoming an evalpreneur has been different from most others in the field, as she didn't come into the evaluation field with a traditional technical or methodological background. Instead, she brought a deep substantive knowledge of human rights and advocacy, which served as a solid base. She specialized in qualitative research methods, which she learned over time through workshops with the American Evaluation Association, and by learning from experts who have strong academic backgrounds in the relevant disciplines, she explained.

Evalpreneur Mira (KAI position=82). Mira is a 67-year-old woman with a unique career journey that combines her ministry background with a deep passion for evaluation. She was ordained as a Presbyterian minister in 1981 and spent 17 years serving various churches, where she built meaningful connections with her community and sharpened her leadership and administrative skills. As her children grew older, Mira found herself considering a new career path. Seeking to align her professional aspirations with her changing personal life, she returned to school to become certified in secondary social studies education, aiming to transition into teaching. However, this career change did not unfold as planned, and Mira soon found herself at a crossroads. A move to a new location marked a pivotal turning point in her life. There, an opportunity arose in the university's evaluation department, where Mira's background in

administration made her an ideal fit for managing urban grants. It was during this time that Mira began taking courses in evaluation, and what began as a professional necessity quickly blossomed into a passion. After about two years in the university's evaluation department, Mira transitioned to a 17-year career with a health department as an evaluator and then a business owner. To this end, she noted

When I retired in 2020, we relocated to a different state. However, after a year, I realized how much I missed evaluation work. So, I decided to start my own business as a sole proprietor. It's a small operation, and most of my work involves subcontracting or collaborating with other evaluators. It's been a great way to continue doing what I love while working independently.

Evalpreneur Clarisa (KAI position=80). Clarisa, a 51-year-old white woman, has been with her current company for 14 years, since 2001, and for much of that time, she co-led the organization. Before this, she worked in nonprofits in the Bay Area, specifically in San Francisco and Oakland. With a long-standing interest in evaluation, she eventually made the decision to transition into this field. Clarisa shared the story of how she shifted from nonprofit work to a career in evaluation.

"I've always been passionate about evaluation, although I didn't fully understand what it involved at first. My partner, Brooke, was already an evaluator, and I had also worked with another firm in the Bay Area. Curious about how to break into the field, I started asking around, and both Brooke and the other firm offered me positions. I decided to accept Brooke's offer, and from there, I stayed and gradually grew into the role. Eventually, Brooke promoted me, and I became a leader in the organization. We have a strong working relationship, built on mutual respect and the ability to provide each other with constructive feedback. This dynamic has been key to our success and is also why Brooke has offered me the opportunity to buy into the company.

Clarisa also reflected on her entrepreneurial journey:

"I didn't set out to be an entrepreneur, but my passion for evaluation was always there. I didn't fully understand what the field was about at the time, but I knew I wanted to be an evaluator. Having worked in social services and nonprofits, I met Brooke, which helped me gain a deeper understanding of the field. That eventually led to me joining the company. It wasn't a traditional entrepreneurial path, but it's certainly been an exciting

one. Over time, I've taken on more leadership, and now we're in the process of negotiating for me to buy into the company.”

Thematic Analysis of Interview Data

As outlined in Chapter Three, the interview data for this phenomenographic study were analyzed using a thematic analysis approach aimed at exploring how adaptive and innovative evalpreneurs express and integrate their multiple identities, as well as how coping behaviors manifest in collaborative evaluation settings. The analysis followed a structured, iterative process, drawing on Jobin and Turale's (2019) seven-step phenomenographic analysis model, complemented by analytic induction and constant comparative methods (Simpson, 2019; Yom, 2015). Analytic induction was used to identify patterns of relationship among variables, while constant comparative analysis involved iterative coding to identify recurring and divergent themes across participants (Yom, 2015). Interview transcripts were initially transcribed and open-coded in Word documents, followed by focused coding to categorize data into overarching themes using Excel. In the second iteration of focused coding and constant comparative analysis, the following steps were taken to document quotes for both adaptive and innovative evalpreneurs in an organized manner using Excel. In the third iteration of data analysis, the emergent themes were refined and directly applied to both the data set and the conceptual framework. This phase involved synthesizing the insights gained from the initial open and focused coding stages and aligning them with the broader research questions and OSBP conceptual model guiding the study. The key findings and refined themes are detailed below:

- 1) Individuals see alignment of problem-solving style and their personality, but not always an aspect of identity

- 2) Both adaptive and innovative evalpreneurs hold and express multiple intersecting identities that shape how they relate to their work and collaborators
- 3) Both adaptive and innovative evalpreneurs often integrate aspects of their expressed identities into their collaborative evaluation consulting work in an ongoing and sometimes challenging process, where some identities complement each other (high II) while others conflict (low II).
- 4) Evalpreneurs described evidence of behaving outside their preferred problem-solving style (coping behavior) as a response to environmental and team demands in the evaluation consulting context
- 5) Emerging six sub-themes illustrate the nuanced ways coping behavior manifests in both adaptive and innovative evalpreneurs. Sub-themes identified were:
 - 5) Emerging six sub-themes illustrate the nuanced ways coping behavior manifests in both adaptive and innovative evalpreneurs. Sub-themes identified were:

Sub-theme 1. All interviewed evalpreneurs—regardless of whether they were adaptive or innovative described a tendency to cope more adaptively

Sub-theme 2. Among adaptive and innovative evalpreneurs, coping behavior was a blend of preparedness and spontaneity, shaped by personality, context, and experience

Sub-theme 3. In situations requiring coping behavior, both adaptive and innovative evalpreneurs tend to employ strategies aligned with their preferred problem-solving styles

Sub-theme 4. Both adaptive and innovative evalpreneurs described coping experiences as emotionally complex, involving a blend of stress, frustration, and empowerment

Sub-theme 5. Among adaptive and innovative evalpreneurs, coping is not only a response to situational demands but also an ongoing learning process, a catalyst for personal and professional growth

Sub-theme 6. Adaptive and innovative evalpreneurs believed their coping behavior were noticed by others while sometimes it went unnoticed by clients or team members

Research Question 2: How do the more adaptive and innovative evalpreneurs integrate their identities, especially in teamwork and group dynamics?

This research question sought to understand how adaptive and innovative evalpreneurs experience the integration of their identities, particularly as those identities manifest in teamwork and collaborative relationships.

Theme 1.

Individuals see alignment of problem-solving style and their personality, but not always an aspect of identity

Related to Research Question 2, this theme emerged through participants' reflections on their KAI results, which assess their problem-solving styles as adaptive or innovative. Aligned with the OSBP model by Anderson et al. (2018), participants engaged in introspection, to reflect on how learning about KAI impacted the understanding of self and whether their preferred style is an integral aspect of their identity (Anderson, 2021). This process of reflection extended into interpretation, as evalpreneurs evaluated and assigned meaning to their preferred styles, particularly regarding how these styles benefit their work with teams. The following sections

provide an analysis of the interviewed data, beginning with the innovative evalpreneurs, followed by a focus on the adaptive evalpreneurs.

Innovative evalpreneurs

Zane, an innovative evalpreneur, scored a total of 116 on the KAI. The analysis of factor traits (KAI sub-scores), revealed that Zane's SO score was 51, suggesting that he is more likely to generate many, novel, outside-the-box ideas that could be risky and not readily implementable (Kirton, 2011). Consistent with Kirton's findings, Zane's reflection on his KAI results revealed:

I felt that my KAI scores confirmed what I already knew about myself. I answered the questions truthfully, so nothing was surprising. The KAI inventory gave me a clearer picture of where I stand, especially on the more innovative side. I know that, as a business owner, I need to be more innovative thinking outside the box and constantly finding new ways to grow the evaluation business.

As Zane's evaluation business grows to over 17 team members, he demonstrates a need for innovative thinking to grow his business. Similarly, evalpreneur Ella, reflected and said, "I wasn't surprised by my KAI score of 116, which placed me on the more innovative side... And I do see my style as an integral part of my identity." Reflecting further on her style's usefulness in teamwork, Ella noted,

When I think about my management team, I probably fall farthest on the innovative side of the spectrum. But even so, I suspect that the rest of the team is close to me in terms of how we approach problem-solving. There might be one person who is a bit more adaptive and prefers to improve existing solutions rather than radically changing them. Sometimes we experience tension because of differences in styles, but our team works well together, perhaps in ways that aren't entirely related to how we approach problems.

These interview findings are not a surprise because Ella's KAI of 116 included an SO score of 48, an SE score of 24, and an SRG score of 44, demonstrating a moderately innovative approach

to her work, recognizing the need to collaborate with individuals on her team who are more adaptive.

Another innovative evalpreneur Skylar scored a total of 117 on the KAI, with an SO score of 49, suggesting that her idea generation is moderately innovative. However, the analysis of her SE score of 18 suggests a more adaptive approach to her methodology of problem-solving, where Skylar prefers methodical and reliable solutions even though her total score indicates a more innovative preference. The SRG score of 50 suggests that Skylar often challenges conventional methods and pushes for radical changes in pursuit of different solutions. Reflecting on her KAI results, Skylar reported,

It's not surprising to me that I am an innovative individual. There are aspects of the KAI that resonate with me, like the idea of not getting bogged down and finding ways to make things work differently. I'm always looking for ways to push forward and find solutions. The distinction between innovators and adaptors was something I hadn't considered before, but it made me reflect on how I tend to think and solve problems... However, I don't think of myself in terms of a problem-solving style, but I do consider myself a problem-solver. Being a leader in my company means I must solve problems every day.

A more innovative evalpreneur than the previous, Lucia, scored a total of 124 on the KAI, indicating a strong innovative problem-solving preference. With an SO score of 54, Lucia is inclined to generate creative, outside-the-box ideas, often pursuing novel and bold solutions that may not be readily implemented (Friedel, 2014). Consistent with this finding, Lucia highlighted in an interview that although she doesn't claim her style to be an integral part of her identity, knowing her KAI score was insightful. She said, "I now understand that the fact I generate ideas is one thing, but making sure they get implemented effectively is another thing". Her SE score of 25 suggests a more moderately innovative methodological approach to problem-solving, and her SRG score of 45 indicates that she is moderately innovative when it comes to

rules and group conformity (Kirton, 2011). As per these findings, Lucia's reflection on her KAI scores, revealed,

My KAI score is 124, placing me on the more innovative side of the scale. Looking at the bell curve, I fall somewhere between the 68% range, which represents the middle group, and the 96% range, on the far end. This is not too surprising to me because, in terms of how I approach problem-solving and collaboration, I'm naturally attracted to innovative approaches. I thrive in environments that are fast-paced and ever-changing, where there's room for experimentation and risk-taking. However, I do struggle when situations require more consistency, small, incremental improvements, or rigid processes.

Lucia also shared how the KAI helped her realize the value of working with people whose cognitive styles are more adaptive. "The KAI helped me understand how important it is to work with others who complement my cognitive style," she said. "I tend to generate lots of ideas, but it is the methodical, detail-oriented individuals with adaptive styles who help implement those ideas in a practical and structured way. That collaboration is key to the success of any project.", Lucia added.

Brooke is another innovative evalpreneur who scored 125 on the KAI, with a strong idea generation SO score of 53, an SE score of 27 indicating a balanced methodological approach to solving problems, and an SRG score of 45 which suggests a moderately innovative regarding rules and group conformity (Kirton, 2011). Reflecting on her KAI results, Brooke stated,

Now that I've learned about KAI, it's starting to make sense, even in my work as an evalpreneur. Much of what I've learned has been validating for me. A lot of my current role revolves around business development, staying up to date with the latest trends in our field, and bringing those new ideas and methodologies back to the team. My job is to ensure that we are evolving and staying relevant, competitive, and adapting to new approaches. So, when I look at my KAI results, they align with my work and identity.

Consistent with her strong idea generation SO score of 53, Brooke shared many insightful ideas when asked to reflect on her problem-solving style and how learning about KAI is useful:

I've noticed that communication with more adaptive team members can be challenging, even with mutual respect. As an innovator, I often struggle to explain my ideas in enough depth or clarity to the adaptive team members, while at the same time, innovators like me might feel that adaptive individuals are asking too many detailed questions or going too slowly.

This realization made me reflect on the team diversity and power dynamics in our organization. As the owner of my company, my perspective often dominates. Knowledge of KAI has helped me to recognize this and find a balance. I've learned that I need to accommodate others by having more structure, even if it doesn't come naturally to me.

In the current shifts within the evaluation consulting landscape, Adaptive people may feel uncomfortable because they need clear instructions and structure, while innovative may thrive in ambiguity, taking the initiative and generating new ideas to solve problems.

KAI is about understanding yourself and your team. When everyone understands their problem-solving style and how it fits within the organization, we can leverage that to work more effectively and achieve better results. For example, an associate who is more adaptive may excel in finance roles where they are required to follow structured processes, while an innovative person may be suited for marketing roles.

Understanding these dynamics and aligning people with roles that suit their style can lead to better outcomes for everyone involved. This is a lesson I've come to appreciate more as our team has grown.

Similar to Brooke, another strong innovative evalpreneur Faye with a KAI score of 127 and a strong idea generation SO score of 55, reflected on her KAI results and shared:

I've always been a bit of a disruptor in my previous roles. At the nonprofit, I was constantly pushing leadership to think about equity, social justice, and the importance of centering young people's voices in our work. In a way, that spirit of innovation and questioning the status quo is reflected in my KAI score, which seems to position me toward the more innovative end. I've always been the person raising their hand to ask questions like: Why are we doing it this way; could we do it differently?

Faye's tendency to do things differently and to question the status quo is reflected in her SRG KAI sub-score of 49, indicating a moderately innovative style—marked by a willingness to question rules, push for meaningful change, and thoughtfully balance structure with group alignment. Her SE score of 23 points to a flexible problem-solving approach, enabling her to navigate between methodical and unconventional methods depending on the task at hand.

Reflecting on how this relates to her identity, Faye shared, “KAI resonates with how I’ve approached both my career and my identity as an evalpreneur. I hadn’t thought about it this way before, but after the interview, I can now see that it’s a key aspect of my identity.”

Lastly, among the interviewed evalpreneurs, Tara stood out as the most strongly innovative, with a KAI score of 147, an SO sub-score of 62, an SE score of 31, and an SRG score of 54. These scores reflect a strong preference for thinking outside the box, generating novel ideas, tackling problems from unexpected angles, and advocating for radical change—often within less structured environments that still value group input (KAI Foundation, 2022) This orientation was evident in her reflections on the KAI assessment, as Tara shared...

Of all the tests and frameworks, I’ve gone through in my career and personal life, I find KAI to be the most useful in a work and team environment. It’s practical. This one feels like something people should know about. I’ve missed it myself, but now I see how valuable it is. Why doesn’t everyone know about this? People use Myers-Briggs and other frameworks, but this one is way more practical. For instance, when I look at a problem, I ask myself: "Is this a problem that something is just broken, and we can fix it? Do we need to do something new? Can we fix it with something that’s already in place, or do we need to start over? ...In this process, my job revolves around gathering people with different perspectives to solve problems. After taking the KAI, I can see where my colleagues and clients fall on the KAI continuum.

Tara's identity as a problem-solving leader in her organization was evident in her reflections. She emphasized the daily responsibility she feels to address issues, even when uncomfortable, stating, "Being a leader in my organization, I solve problems every day. So, it is my responsibility to constantly solve problems, even when it’s uncomfortable sometimes." Reflecting on how her problem-solving style aligns with her expressed identity, Tara acknowledged, "Although I don't think of myself in terms of a problem-solving style, I am a problem-solver—That’s a key part of my role and identity as a leader."

Adaptive evalpreneurs

Among the interviewed evalpreneurs, Clara was the most adaptive, with a KAI total score of 78 and a KAI SO sub-score of 36, which is close to the mean of 41, indicating a preference for generating practical ideas and implementing solutions that are safe, reliable, and low risk. Her SE score of 10 reflects a strong adaptive preference for a methodological, and structured approach to problem-solving, favoring tried-and-tested methods and emphasizing precision and thoroughness. Clara's SRG score of 32 suggests that while she values more structured environments and group conformity. During the interview, Clara shared thoughtful reflections on how her problem-solving style is an integral part of her identity, saying, "Since being introduced to the KAI through this study, I don't think anything is more empowering than knowing that I'm an adaptor and recognizing this as a unique, special skill set." She went on to explain, "KAI has helped me see how different I am from others, and it has strengthened my sense of identity." Clara further elaborated on how learning about the KAI tool has deepened her understanding of her approach to consulting work:

Before encountering the KAI, I had never heard of it, but now I find it fascinating. It has provided me with useful language to describe myself and my strengths. At our organization, we've always been closely connected to the Gallup StrengthsFinder, and I feel the same way about KAI. Through the KAI, I've learned that being adaptive is a strength in our organization. Further, through KAI, I learned that my business partner, the CEO and founder, is on the opposite end of the spectrum—she is more innovative. She's full of big ideas, blue-sky thinking, and spontaneous decisions, while I thrive on routine, planning, and working within constraints. I enjoy finding creative ways to make things happen within a defined structure, rather than working without any boundaries. This balance between her innovation and my adaptive style is why we work so well together. She brings visionary ideas, and I focus on how we can bring those ideas to life.

Clara and her business partner exemplify how differing problem-solving styles—adaptive and innovative—can complement each other for success, aligning with Jenkins's (2022) article which examined how such partnerships make more profits and drive business growth. Reflecting on their collaboration, Clara shared,

My business partner creates the frameworks, and I focus on making them as effective as possible. This dynamic works well within our team too. We have a mix of people with different problem-solving styles, but those of us who are more adaptive tend to be excellent project managers. We excel at execution, getting things done, and making ideas a reality. If it weren't for my business partner's innovative approach, I'm not sure I would have joined forces with her. I could have just as easily worked at a foundation doing internal evaluation, but I felt that my adaptive strengths added value to this partnership, complementing her innovative mindset. I am creative, but I prefer focusing on processes and systems rather than abstract concepts or visions."

Clara's adaptive approach enhances partnership by providing structure and practical execution to balance her partner's innovative vision, demonstrating the power of combining different problem-solving styles for business success.

Another example of a complementary business partnership was found between innovative evalpreneur Brooke (KAI = 127) and her adaptive business partner Clarisa (KAI = 80). Clarisa's KAI SO sub-score of 30 suggests she prefers to generate realistic, manageable ideas that are low-risk, relevant, and practical to implement. Her SE score of 12 indicates a methodical and thorough approach to problem-solving, grounded in proven methods and systematic processes. With an SRG score of 38, Clarisa shows a strong preference for more structure and consistency, favoring established rules and guidelines. The analysis of KAI sub-scores further suggests Clarisa excels in environments that require precision, dependability, and a steady hand—ensuring efficient and pragmatic solutions while remaining open to adjustment when necessary. Reflecting on her KAI results, Clarisa noted that she wasn't surprised by her adaptive style:

When I saw the results of my KAI assessment, it resonated with me. I tend to prefer structure and clarity. I like knowing the rules, and although I'm open to change, I want us to follow a process if we're going to make adjustments." She further explained how her adaptive tendencies show up in her work: "I'm someone who thrives on structure. I'm comfortable making changes, but they need to be done in an organized, systematic way. Brooke, on the other hand, is more of a go-getter. She prefers to break free from structure and act on impulse. That can be challenging for me at times, as I often find myself needing to slow her down, remind her about the process we developed, and ensure we stick to it.

As she reflected further on how her style contrasts with her business partner's style, Clarisa recognized how her practical strengths complement Brooke's innovative style. She explained:

Brooke often wants me to be more spontaneous, whether it's writing blog posts or taking on tasks that require more creative or outside-the-box thinking. But for me, it takes more effort to engage in those activities. I'm better at adapting ideas that are already in place, like proposals. It's just not my strength to come up with brand-new, innovative concepts from scratch.

Clarisa noted that this dynamic has led her to reflect on her role in the team: "Sometimes I feel like I don't get the chance to be as innovative as I'd like to be because I'm constantly channeling Brooke's ideas," she said.

Serena, another adaptive evalpreneur, shared her unique experience with the KAI assessment. She scored 79 on the KAI, with a KAI SO sub-score of 33, indicating a more mild adaptive approach to idea generation—one that focuses on generating practical, relevant ideas that are manageable and ready for immediate implementation. This tendency became evident as Serena reflected on and interpreted her KAI results during the interview. She reported:

Learning about KAI has reinforced what I've known about my skill set for a long time. In the evaluation work I do, which blends both measurement and learning, as well as strategy development, I see my role as part external evaluator and part internal coach...KAI has helped me understand that my adaptive tendencies aren't just a product of my environment or the role I'm in—they're a valuable skill set that helps me be effective and contribute meaningfully to the work I do.

Analyzing Serena's other KAI factor traits such as her SE score of 13, reflects a methodical and reliable approach to problem-solving, where she favors using established techniques and processes. Additionally, her SRG score of 33 indicates that she is mildly adaptive while working within structured environments and adhering to defined rules. This approach is evident in her work with teams and collaborative relationships, as she explained:

The collaborators I tend to partner with are often more on the innovative side of the scale—big-picture thinkers who are highly creative. I see this as both a strength and sometimes a challenge in our working relationship. One of the main ways my problem-

solving style is useful in these collaborations is through my attention to detail. I thrive on the finer points and the meticulous work required to make something polished and complete. For example, when we are preparing a report or presentation, I am usually the one doing the final review, checking all the details, ensuring that everything aligns and that there are no loose ends. I enjoy that part of the process, and it is where my adaptive nature shines. I am the person who catches the small but important details that others might overlook, and I find a lot of satisfaction in it

...And because of that, I do see style as part of my professional identity.

Like Serena, Melody is an evalpreneur with a more adaptive problem-solving style, as evidenced by her KAI score of 79. However, her KAI SO sub-score of 37 indicates a more mild tendency towards adaption, This tendency was reflected in Melody's introspection and interpretation of her KAI results when she explained:

My KAI score is 79, which was a bit lower than what I expected- I thought I was more innovative. That is because I don't like working under other people and I like the flexibility to think outside the box. So, it was a bit surprising that my score was lower than anticipated. However, I do appreciate frameworks and structured ways of thinking. Maybe that's why my style is more adaptive. I tend to pick and choose from a range of options, rather than being fully free-thinking or totally outside the box. In my evaluation work, I often encounter clients who have accountability requirements they need to meet, and a big part of my job is making sure those requirements are fulfilled efficiently. That's where the adaptive style comes in, where I help clients meet their needs.

Melody's SE score of 15 indicates a, methodical approach to problem-solving, where she skillfully uses adaptive preferences. Her SRG score of 27 shows that she values stability and is more inclined to follow established norms, rules, and group conformity, though she is flexible when the situation demands it. This balance was evident in her reflection on her work with groups, where she shared:

Interestingly, KAI talks about how adaptors are sensitive to more group-focused, thinking about how the group functions together, whereas innovators are more likely to push boundaries and challenge the group. I see myself as leaning more toward the adaptive side when it comes to group work. I really want the group to function well, and I'm more focused on ensuring everyone's ideas are heard and that people are working together cohesively

...I would not necessarily say style is part of my identity, but I enjoy the collaborative aspect of my work—the way I collaborate with people, bringing them together,

systematically problem-solving, and working toward efficiency. I would say that this is how I perceive myself, and it is also how I want others to perceive me— as a collaborative evaluator.

These interview findings were consistent with the literature review on identity expression in collaborative relationships (Anderson, 2023), which is also common in evaluation consulting.

This collaborative identity was more evident in the adaptive evalpreneur Mira (KAI=82) who reflected on her experience and stated:

I come from the tail end of the Baby Boomer generation, having been born in the late 1950s, and I often find myself working collaboratively with other evaluators from Gen X or Millennials. They tend to have a quite different approach, which I find fascinating. For example, Millennials often bring more innovative thinking to the table compared to the adaptive approach I am used to. As a subcontractor, I often work with people from these generations who are leading projects. It has been essential for me to adapt my style to align with theirs to maintain smooth collaboration. I think this generational difference has influenced how I work within teams and interact with colleagues.

I would say that people often describe me as being highly organized and energetic—those are words that have been used to describe me consistently throughout my life. And I think that's part of my style, which I see as a lifelong trait. It is not something that changes, and it deeply aligns with who I am.

The analysis of Mira's KAI SO sub-score of 38 indicates a middle score with respect to idea generation, which was reflected in her deeper introspection and interpretation of her KAI results. For instance, her SE score of 11 suggests that Mira favors methodical, efficient problem-solving approaches, prioritizing tested and structured methods that emphasize precision and reliability. Meanwhile, her SRG score of 33 reveals a more mild adaptive approach to rules and structure, highlighting her respect for established group norms and paradigms, while also being open to minor adjustments when necessary. This balance was evident in her reflections on how learning about the KAI had an impact on her evaluation consulting work. Mira, reflected:

When I took the KAI, it didn't come as a surprise to me—it felt accurate. I would describe myself as a moderate person, both in terms of my political beliefs and my approach to problem-solving. I tend to be moderately adaptive, and I'm also very much

an institutionalist. I believe institutions are important and need reform, but not revolution. There's a balance to be struck.

This perspective aligns with many aspects of my life. For instance, I enjoy being part of groups and prefer in-person interactions, when possible, rather than remote work. I think I'm very creative, but I also recognize the importance of structure, especially in the field of evaluation. In our work, data collection must be systematic, and the way we engage with clients must follow a structured approach as well. That's the value I bring to a project—helping others see connections and relationships through a clear, organized lens.

So, in essence, learning about my KAI score reinforced what I already knew about myself. It didn't present a revelation, but rather confirmed that I am someone who values structure, balance, and thoughtful adaptive style in both my personal life and my work.

... I think my adaptive style is part of my identity, which I see as a lifelong trait. It's not something that changes, and it deeply aligns with who I am. People often describe me as being very organized and energetic, those are words that have been used to describe me consistently throughout my life.

Finally, Vivienne, an adaptive evalpreneur with a KAI score of 83, demonstrates a moderately adaptive problem-solving style. However, a closer analysis of her KAI factor traits reveals that she strikes a balance between adaptive and innovative approaches. For instance, her SO score of 41 reflects a moderately innovative tendency in idea generation, while her SE score of 12 indicates an adaptive preference - a methodical, structured approach to problem-solving.

I think it depends on the role I'm playing—whether I'm leading the team or working as a team member. As a team member, I find it very useful because I can adapt and bridge communication between both sides of the spectrum. I'm in the middle of the bell curve, so I can work with both the more adaptive side and the more innovative side. I'm good at communicating well and helping teams function cohesively.

As a leader, though, it's a bit different. If I'm in the middle of the bell curve and leaning more toward the adaptive side, I think there's more potential for conflict, especially with more innovative people. As a leader, I feel like I can only innovate so far, and I don't want to shut down ideas that people are throwing out. So, while my style can lead to conflict in leadership roles, I find it much more beneficial as a team member.

Further, Vivienne's SRG score of 30 suggests a tendency to thrive in environments that value pragmatic innovation and structured problem-solving, with a willingness to embrace

change when it enhances effectiveness. Reflecting on her adaptive problem-solving style as revealed by KAI results, Vivienne reported:

I found KAI knowledge affirming, especially the part about efficiency and improving things to make them better. Reflecting on my experience working in large research firms, I often saw inefficiencies that ended up costing clients more money: relying on SPSS for data analysis, which was clunky and slower than R. When I helped to bring change and focus on R, it saved hours, both for me and for our clients. Realizing this ability to be flexible and efficient was eye-opening... but I hadn't connected it with a specific problem-solving style until I learned about KAI.

Consistent with Kirton (2011)'s A-I theory that suggests that all people are agents of change within the parameters of their problem-solving styles, Vivienne's experience about bringing change to the organization is a clear example of a creative adaptor bringing an adaptive change.

In summary, this theme highlighted the evalpreneurs' introspection and interpretation of their problem-solving styles aligned with KAI character traits of their style, but some didn't see it as part of their identity.

Theme 2.

Express identity varied across respondents but there were no clear differences in how adaptive and innovative evalpreneurs expressed their multiple identities that influence how they show up in their evaluation consulting work.

Building on the OSBP conceptual framework, participants engaged in both introspection and interpretation, reflecting on how their multiple identities intersect and influence their collaborative relationships with clients, teams, and partners. As highlighted in the study's a priori assumptions and supported by the OSBP framework, as well as previous research on expressed identity (Anderson et al., 2018; Simpson, 2019; Simpson et al., 2024), evalpreneurs identified

several aspects of their expressed identity that shape their work. As detailed in the following section, findings from the demographic survey and interviews reveal that in addition to problem-solving styles (adaptive or innovative) being part of their hidden identity (Anderson, 2021), evalpreneurs' sense of "who I am" was also influenced by factors within Kirton's Cognitive Function Schema (Kirton, 2011; Anderson, 2023). Both adaptive and innovative evalpreneurs expressed their identity based on cognitive resources, which include factors like education, knowledge, skills, lived experiences, and professional authority in the field of evaluation. Additionally, both groups expressed their identity through cognitive affect, encompassing factors such as race, gender, cultural background, spirituality, values, and family roles. For some, social identity, based on the groups and professional associations they belong to, also plays a role in shaping their identity expression. The following section presents an analysis of the interview data, supported by related literature, to explore how expressed identity varied across participants. While differences emerged in individual identity narratives, no consistent patterns were distinguishing how adaptive versus innovative evalpreneurs expressed the multiple identities that shape their approach to evaluation consulting work.

Innovative evalpreneurs expression of their multiple identities

When asked to describe other aspects of their identity—such as personal and professional factors—that influence how they approach their work, innovative evalpreneur Zane (KAI=116) shared that various aspects of his expressed identity include identity factors in the cognitive resources such as the skills he's developed through consulting, data analysis, and higher education, as well as his leadership abilities, educational background, and experiences, all of which shape how he runs his business as an entrepreneur (Anderson, 2023). Additionally, Zane

shared that his core identity is deeply rooted in his family role and personal interests in the cognitive affect (Kirton, 2011) and the social groups to which he belongs, as he explained:

When I think about my core identity, it all starts with my life partner and my family. They're the foundation of everything for me. My wife and I spend a lot of time together, especially in the evenings, connecting through things like TV shows and travel. Outside of work, I'm very focused on physical activity. If I'm not working, sleeping, or eating, I'm probably exercising. I'm part of two different social groups—one is a running club, and the other is a "Rucking" club, where we do hikes with weighted backpacks.

Another important aspect of the expressed identity highlighted by Lucia (KAI=127), includes identity factors in the cognitive affect (Anderson et al., 2018). As expressed in the following statement from Lucia, these identity factors included race as white, gender, social status when growing up in the middle class, and one's values as a social justice advocate.

In the context of the work I do, I'm mindful of the privileges I carry. I'm white, cisgender, mostly able-bodied, and I grew up upper-middle-class. There's a lot of privilege tied to these aspects of my identity. Recognizing that is important because, in my social justice work, I need to know I haven't experienced a lot of the challenges that others face, even though those challenges might affect people I care deeply about.

That awareness shapes my work because I need to listen to and elevate the voices of those who are most directly affected by the issues we're working on. Being mindful of my privilege—especially in social justice, means being intentional about how I use my position to bring others' perspectives forward.

For the innovative evalpreneur, Ella (KAI=116), identity is expressed in several layers, each contributing to how she approaches her work as an evalpreneur. She explained, "If I were to break it down, I'd say that my entrepreneurial identity, my feminist values, and my roles within family and community all come into play in how I approach my work as an evalpreneur". As for Brooke (KAI=125), she realized that being a business owner with a mission to eradicate systemic injustices and contribute to social change (Social change agent) is an aspect of her expressed identity. As Brooke explained, other aspects of her identity are in the cognitive affect, including race, language, social status, and one's values like fairness and equity (Anderson et al., 2018).

I think a big part of my identity, especially in the context of my work, is shaped by the mission-driven nature of what I do. I've always had a strong sense of fairness—like many people in mission-driven fields—and that started when I was very young. In high school, I noticed systemic injustices in our society, and it sparked a desire in me to do something about it. I want to use both my personal and professional life to contribute to social change. That's why I'm drawn to evaluation as a field—it aligns with my values, like fairness and equity, and allows me to be a part of meaningful social movements. But I'm also very aware of the privilege I hold as a white woman who speaks English, went to prestigious colleges, and has a lot of opportunities. I know that being in this position comes with power and blind spots. So, I try to balance this awareness of my privilege with my desire to contribute to social change. ..I also think that being a business owner is another identity that's very much a part of who I am.

For the innovative evalpreneur Faye (KAI=125), her expressed identity included being a mother of teens, being an educator as well as having technical competence and expertise in methodology and youth development, which falls in the cognitive resources. She explained

I'd say two key areas come to mind: content expertise and methodology. I bring a background in youth development—I've run youth programs, worked closely with youth workers, and have been a youth worker myself. This gives me a unique perspective that not all evaluators have since I can relate directly to the people I'm working with. Besides my experience in youth development, another part of my identity that informs my work is being a mom. I have two teenagers and it's interesting because they're the same age as the youth I'm working with in the organizations I support. Also, my identity as an educator plays a big role... So, all these identities—being a mom, an educator, a youth development expert— influence how I approach my work.

Lastly, the most innovative among the interviewed evalpreneurs, Tara (KAI = 147), reflected not only on her identity as an evaluator but also on other aspects of expressed identity rooted in cognitive affect, such as her personal values and family roles (Anderson, 2023). Her strong connection to people and communities in her social environment further reflects her social identity and how it informs her work. She explained.

In addition to my work identity as an evaluator, I've identified myself as a woman, a mother, a good listener, and a cheerleader for others. These aspects of my identity are really important in shaping how I approach my work. I think a huge part of my approach is rooted in deep care for people and communities. This influences my decision to work in a highly localized way because I have a strong connection to where I live and to the people I'm serving. I also choose to work with organizations that align with my values, so I can make sure the work is meaningful and impactful

Adaptive evalpreneurs expression of their multiple identities

Some of the interviewed adaptive evalpreneurs described the expression of their identities as evaluators and business owners as central to navigating their work. For example, Clara (KAI=78) offers a compelling example of how these personal and professional identities are expressed to shape her work when she reflected on her lived experiences as follows,

My identity is shaped by physical aspects, like being a white, able-bodied woman from a middle-class, millennial. These factors have afforded me privileges and opportunities that have, in many ways, shaped how I've ended up where I am today and my identity. I'm also the granddaughter of entrepreneurs, which plays into how I view myself. I also grew up in a very religious environment—I was raised Catholic. While I no longer identify as Catholic, the values of spirituality, community, and connection that I learned are still very important to how I approach my work.

Clara's recognition of her privileges, such as her race and class, has become more pronounced over time, especially in professional settings focused on social justice and equity. She emphasized, "Whiteness has been so central in this country for so long, and when working in spaces focused on social justice and equity, I make a deliberate effort to step back and ensure I don't center myself or my whiteness." Clara's adaptive preference is reflected in her commitment to creating inclusive spaces where others are empowered and heard. She values collaboration and often takes on behind-the-scenes roles, enabling her team members to shine in their respective roles. Similarly, Vivienne (KAI=83) highlighted how her identity is shaped by her commitment to social justice. She explained,

My identity is deeply connected to the work I do to help improve social justice. I feel strongly about not perpetuating injustice, that's something that informs my work and how I interact with others. I also see myself as connected to nature. Living in Montana, I feel deeply tied to the ecosystem and the interconnection of all beings. This sense of interconnectedness influences my collaborative work, where I see myself not as an evaluator above others, but as part of the team solving a problem

Vivienne's identity as an evaluator and social justice advocate shapes her approach to collaborative solving problems and attaining positive change. As for Melody (KAI= 79), it was not obvious how identities are expressed, but social identities, family, and relationships played a key part. She shared:

In terms of my work, I partner with people on evaluation projects and subcontract for others. These are friendly, informal relationships. I don't have a strict professional boundary; I share personal things with my internal team. For instance, I might tell them I'm having trouble with my son or dealing with something with my husband. It's very informal and very personable, and I think that helps build strong relationships

Mira (KAI=82), like Clara, attributes much of her identity to her spiritual background, which significantly influences how she works and interacts with others in her evaluation consulting practice. She shared

I think my identity includes several key aspects that influence my approach to working as an entrepreneur. First, my background as a pastor has been incredibly formative. As a minister, I developed a deep respect for listening to others. I tend to want to understand who people are and what their stories are before I share much about myself. That's something I carry with me in my professional life. I'm deeply interested in what others are saying, which fosters a collaborative environment where everyone feels heard.

Mira further explained how her spiritual identity, along with her teaching background, brings warmth, empathy, mentorship, and expertise to her collaborations. At the same time, her evaluative mindset drives her to constantly think critically about how to improve and optimize every aspect of her work. Finally, Serena's identity as a policy advocate plays a foundational role in how she practices evaluation. With a background as a lobbyist and a staff for a member of Congress, Serena brings a unique perspective to evaluation. She stated,

I would say that my primary professional identity is as a policy advocate. I've been both a lobbyist and a staff for a member of Congress, which gives me a solid understanding of what's usable within evaluation for policy audiences. This helps me focus on the usefulness of evaluation findings for my clients, particularly how they will portray their value within a larger ecosystem. Additionally, I bring a business orientation to my work in evaluation, which influences how I approach measurement, learning, and strategy. For example, I've worked with small offices within large organizations that struggle with

how to portray their value to senior leadership or funders. I draw from my business background to help them communicate their contributions better.

Her professional identity as a policy advocate, coupled with her business orientation, allows her to approach measurement, learning, and strategy in a way that emphasizes both impact and practicality. She uses her background to assist clients in communicating their value to senior leadership and funders.

Theme 3.

Both adaptive and innovative evalpreneurs often integrate aspects of their expressed identities into their collaborative evaluation consulting work in an ongoing and sometimes challenging process, where some identities complement each other (high II) while others conflict (low II).

Through introspection and interpretation of the OSBP conceptual model (Anderson et al., 2018), participants reflected on their practical experiences, considering how two or more aspects of their identities were either easily integrated and complementary (high II) or in conflict and more difficult to reconcile (low II) (Cheng et al., 2008). This section presents interview data findings on how both adaptive and innovative evalpreneurs experienced varying degrees of identity integration, with some identities complementing each other (high II), some creating conflicts (low II), and others presenting a challenging process.

The experiences of II among innovative evalpreneurs

For some innovative evalpreneurs, integrating multiple aspects of their identity into their work is an ongoing and sometimes challenging process, while in some situations II was easy and other times hard. For example, Ella (KAI=124), an innovative evalpreneur, emphasized the

positive impact of the cooperative model used by her evaluation consulting firm on fostering collaboration. In this model, all staff members have the potential to become worker-owners, which aligns their success with that of the company and creates a sense of shared purpose. Ella noted, “I find it easier to collaborate and I feel supported in integrating my identities and collaborating with my team, there are always opportunities for growth.” She reflected on a specific instance where she experienced high II and shared the impact it had on the project:

A good example would be a project I worked on last year for the state of Minnesota, where we were gathering input for a kindergarten fall assessment. At that time, I had a kindergartner, so my experience as a parent was directly relevant to the project. In a meeting with our clients — who were mostly state employees — I could bring my perspective as a parent to inform our discussion about how we might engage families in the process. I’d think, “As a mom, here’s how I’d want to receive information,” or “This is what might resonate with other parents.” So, even though my role was to serve as the evaluator and consultant, I found that my identity as a parent was an asset in that project.

Ella’s experience underscores that achieving high II is possible when individuals are mindful of how their identities shape their interactions and are open to learning from others. In contrast, Zane (KAI=116), another innovative evalpreneur, emphasized that high II is not immediate but rather a process of trial and error. While sharing an example of how integrating aspects of his identity, such as being a husband, father, and boss, was relatively easy, Zane acknowledged

I feel like my approach to work is just an extension of who I am. I don't treat my work life as a separate entity. For example, as a father, I’ve learned to be more patient, and I bring that into the workplace. People grow at different paces, and that’s something I understand now. It's not like you just hand someone a skill and they instantly know how to use it. You go through a process of trial and error, and sometimes it's a winding road.

Another similar example of a challenging process during II is reflected in Faye’s (KAI= 127) narrated lived experience before starting her evaluation business, but II is easy compared to now she is an entrepreneur. She reflected,

Before starting my business, there were times when my identity as a mother, for instance, had to take a backseat. When I worked as a graduate assistant, I didn’t have the flexibility I have now. There was no support for moms, and no option to work remotely, so I had to

bring my kids with me to the office sometimes. It was challenging to manage those roles in environments that weren't as flexible.

But now, as an entrepreneur, I've found a way to truly integrate everything. I can interact with my kids when they come home from school, take a break when I need it, and still get my work done. This level of integration was only possible once I had more control over my time.

For Faye (KAI = 127), becoming an entrepreneur made it much easier to enjoy the flexibility to engage in personal activities throughout her day, such as taking walks, playing her cello, or running errands, all of which contribute to her sense of balance and II. Another similar example of high II is reflected in Lucia's (KAI score = 124) who shared that her identity as a woman and mother was easy to integrate into her evaluation consulting work.

Being a woman and a mother is relatively easy to integrate into work, especially since our team is largely female. We openly talk about balancing caregiving responsibilities and work. I need to model that it's okay to talk about parenting in the workplace, whether you're a mother, father, or caregiver. I think that's become a positive, normalized part of our culture.

This was one evidence of high II but Lucia experienced low II in another situation, as she noted,

My whiteness and the privilege that comes with it—was harder to integrate into the work, especially when we're doing social justice work in communities of color. It's uncomfortable to acknowledge, but it's necessary. We do a lot of work to make sure that we're not just doing "good" but that we're doing the right kind of work. And that includes being transparent about our positionality and how it affects our work

Moments of low II were also experienced by Brooke (KAI = 125) who shared a situation when professional decisions conflicted with her social values. Reflecting on a difficult choice during the pandemic, she said:

For example, having to let someone go or making changes to someone's role that weren't ideal for them, but were necessary for the business—those decisions challenged my values around justice and fairness.

There's been dissonance for me, especially when I've made decisions out of fear or out of a need to protect the financial health of the company. I've learned a lot about how to better manage those moments, but there's still a deep sense of discomfort when my actions don't align with my social justice principles. The pandemic was a particularly

tough time for this—many hard decisions had to be made quickly, and they didn't always feel aligned with my values of equity and care for others. It was a real struggle.

These moments of dissonance illustrate a low level of II, where personal values and professional actions are not fully aligned, leading to discomfort and internal conflict. Tara, a strong innovator with a KAI score of 147, shared an example of how she expressed identities as a mother and an evaluator often came into conflict, highlighting a situation of low II:

I often find that the care I have for my family and community shapes how I approach my work. But there are also times when these identities conflict. For example, I might feel like I need to prioritize my family's needs, but my work as an evaluator requires tough decisions that may not always align with those personal commitments. I've had moments where the "mother" part of my identity conflicts with the practical demands of my business. For instance, if my child is sick and I need to make a decision at work that isn't ideal for my family, I might feel torn. But I've learned that the challenge lies in balancing these conflicting demands while still staying true to my values and maintaining a sense of care and empathy for all parties involved

Tara shared that she finds it easier to integrate her identities in smaller groups or one-on-one settings. In these environments, the leadership is more shared, and power dynamics are more balanced, which allows her to be more authentic and bring her whole self to work (Syed & McLean, 2016). However, in larger groups, while collaboration remains essential, she sometimes feels like an outsider when the group's expectations clash with her preferred style.

The experiences of II among adaptive evalpreneurs

For some adaptive evalpreneurs, integrating multiple aspects of their identity into their work is an ongoing and sometimes challenging process, while in some situations II was easy and other times hard. For Clara (KAI=78) and Vivienne (KAI=83) for instance, integrating their multiple identities into their work comes easily, especially when working in environments that prioritize authenticity and shared values. Reflecting on her II, adaptive evalpreneur Clara shared:

It's very easy for me to integrate my identities because I created this space. At our evaluation consulting firm, we place a strong emphasis on authenticity and being genuine, which means we encourage everyone to bring all parts of themselves into our work. I feel incredibly comfortable bringing up every aspect of my identity—no matter the circumstances—because I know I belong to this team. There's a strong sense of acceptance, and I never fear being judged or excluded.

Similarly, Vivienne (KAI =83), finds it easier to merge her personal and professional identities when working with teams that share her values. She reflected:

I find it easier to integrate my personal and professional identities when working with teams because I tend to work with people who share similar values. In my teams, we don't have a hierarchy. We're all equal contributors, and I don't have to separate my personal beliefs from my professional work. I'm collaborative, and I value the input of everyone, regardless of their title or position. It can be more difficult if there's a situation where people don't share those values, or if there's a power imbalance, but in my work, I tend to gravitate toward teams and projects where these values align. So, for me, integrating personal and professional identities is not something I struggle with, especially in a collaborative environment

It in a collaborative environment was evident in Vivienne's work with nonprofit organizations, where she viewed herself as a partner, recognizing that the organizations themselves were the true experts in understanding the communities they serve. A similar experience emerged from a recent project involving adaptive evalpreneur Serena (KAI score=79) and her innovative partner. The client, eager to implement a specific outcome, was determined to move forward based on their vision. However, after reviewing the data, Serena felt the evidence didn't support the client's proposed direction, while her collaborator believed they should still back it. Struggling to fully align their perspectives, they decided to present the client with a range of options, clearly outlining the varying levels of supporting evidence. Reflecting on this experience, Serena shared, "I think it's easier now to integrate my identities, but it can still be challenging at times."

Similarly, another adaptive evalpreneur Melody (KAI score=79) also shared about the difficulty of integrating multiple and at times, conflicting identities

In terms of integrating my own identities, like being a mom, a student, and a business owner, it's more challenging. I find it hard to reconcile my role as a new mom with my responsibilities as a student and business owner. These identities feel like they require me to choose one over the other at times. It's a little easier now that my son is a bit older and I can manage work while he's around, but there's still that internal struggle. The identities that are closer to each other, like being a mom and a business owner, are easier to integrate. Others, like being a student and professional, don't always feel compatible.

It is clear from these experiences that both adaptive and innovative evalpreneurs experience varying degrees of identity integration depending on their work environment and personal values.

Research question #3: How are coping behavior evidenced among the more adaptive and more innovative evalpreneurs comparatively?

In alignment with the OSBP conceptual framework, particularly regarding observed behavior that includes both preferred and coping behavior (Anderson et al., 2018), participants engaged in introspection, reflecting on instances when they recognized the need to employ coping behavior. As they were describing their situations, aspects of environmental feedback (EF) were evident capturing how others, particularly team members and the external environment, responded to an individual's observed behavior.

Following Kirton (2011), individuals tend to operate according to their preferred problem-solving style but may at times adopt coping behavior that fall outside their preferred styles). Coping is therefore not natural, it can be stressful at times, it is a learned technique to behave (solve problems) in a style that is not in accord with one's preferred problem-solving style (Kirton, 2011). Unlike preferred behavior, coping requires deliberate effort and can be mentally or emotionally taxing, particularly when sustained over long periods (Friedel, 2014). Consistent with Kirton's (2011) findings, interview data revealed that evalpreneurs often operate

outside their preferred problem-solving style in their evaluation consulting practice, coping either adaptively or innovatively depending on the situation.

Theme 4.

Evalpreneurs described evidence of behaving outside their preferred problem-solving style (coping behavior) as a response to environmental and team demands in the evaluation consulting context

This theme explores how adaptive and innovative evalpreneurs demonstrate coping behavior when faced with tasks or situations that require them to operate outside their preferred problem-solving styles, in accordance with the *a priori* assumption for this study and the OSBP conceptual framework, particularly regarding observed behavior (Anderson et al., 2018). Participants engaged in introspection, reflecting on instances when they recognized the need to employ coping behavior. When describing situations where evalpreneurs had to use coping behavior, aspects of environmental feedback (EF) were evident. This EF captured how others, particularly team members and the external environment, responded to an individual's observed behavior.

Evidence of Coping Behavior by Adaptive Evalpreneurs

The findings from the interview data highlight how adaptive evalpreneurs experience and manage coping behaviors when faced with situations that demand behaviors outside of their preferred problem-solving styles. According to Kirton (2011), individuals typically solve problems in line with their cognitive preferences. However, when they encounter situations that require deviations from their usual approach, they must engage in coping mechanisms, which

can be mentally and emotionally taxing (Samms & Friedel, 2014). For example, Clara, an evalpreneur with a predominantly adaptive style, recounted a recent experience in which she felt a need to cope:

We were close to finalizing a report for a client, and it was a project with a lot of learning curves. It was a presentation we were working on, but it didn't go as planned. I wasn't present for the presentation—I was flying back from North Carolina—but I debriefed with the team. It turns out that the usual way we communicate our findings didn't resonate with this specific audience, which was a bit of a setback. That's when I knew I needed to adapt my approach. We had to rethink how to present the information. The usual format and style just weren't going to work for this client. So, I had to push myself into a more innovative space to reframe how we were reporting and communicating.

Serena (KAI=79) described a slightly different situation related to her work in advocacy evaluation, where she frequently collaborates with organizations that are new to the concept of formal evaluation, measurement, and learning. In her situation, she was assigned to a client whose project had minimal documentation, and they had not yet developed a clear theory of change or measurable outcomes. The project was still in its early stages, and the client was moving fast. Serena found herself needing to adjust her typical approach, which involves reviewing reports and existing frameworks, to cope with the absence of such information. Instead, she had to gather data in the field, without the usual groundwork, and build a foundation for measurement and learning from scratch.

Another adaptive evalpreneur, Mira (KAI=79), noted a situation she felt a need to cope with:

I work closely (was sub-contracted) with a very talented 35-year-old who owns her own business. She's a millennial, and her working style is much different than mine. She tends to work late at night, close to deadlines, and sometimes even "wing it." She's so smart that she can appear prepared even when she isn't. However, for me, if I'm not prepared, things don't go well. I prefer to be ahead of deadlines to adjust anything that needs fixing. In this situation, I realized I needed to adapt my behavior and recognize that we work differently. My coping mechanism was to respect her style, support her in a non-interfering way, and avoid creating unnecessary anxiety.

Mira noticed early on that her emails often come close to deadlines. She also mentioned she tends to multitask and has a bit of an ADHD (Attention-Deficit/Hyperactivity Disorder)

tendency, which makes her jump between tasks. “My style is quite different. I tend to dig deeply into one task and focus solely on it until it’s done. On the other hand, her style is all over the place, everything all at once”, Mira explained. “When I learned about KAI, I realized my preference was more adaptive, while she had a more innovative style”, Mira added

When asked a similar question, an innovative evalpreneur Brooke with a KAI score of 125 shared, “Right now, I find myself in a situation where I have to actively resist the impulse to avoid or procrastinate on a difficult task.” She acknowledged that it’s tempting to focus on anything else to escape the challenge at hand. However, she relied heavily on positive self-talk, reminding herself of the task’s importance and why it needs to be completed. She explained, “I find what I am doing challenging... It's difficult for me to stay motivated on tasks that feel detail-oriented and inconsequential. The attention to detail doesn't come easily, but connecting the task to a bigger picture helps me push through”.

In summary, adaptive evalpreneurs demonstrated the ability to cope with situations that required them to step outside their preferred problem-solving styles. These moments of coping involved adopting more innovative approaches, adjusting to unexpected conditions, and navigating interpersonal dynamics. The findings suggest that coping is a crucial skill for evalpreneurs, allowing them to remain flexible and effective in their work while balancing their cognitive preferences with the demands of their roles

Evidence of Coping Behavior by Innovative Evalpreneurs

Kirton (2011) argues that individuals typically solve problems in line with their preferred cognitive style. However, when faced with situations that require them to move beyond their usual approach, they must cope, which can be both mentally and emotionally challenging

(Samms & Friedel, 2014). In this section, innovative evalpreneurs shared experiences where they were forced to adapt their innovative problem-solving tendency to address unexpected challenges. Their reflections highlight how coping behavior unfolds in the context of evaluation consulting work. For instance, innovative evalpreneur Lucia (KAI=124) shared a situation where she had to cope, explaining:

I often find myself in situations where I need to cope more adaptively than my preferred style allows. For example, I'm naturally an idea generator, and I have numerous ideas about how things can be done. I love coming up with innovative solutions, but I'm less skilled at executing those ideas. So, in situations where I'm working with a team that needs to move from ideas to an actionable plan, I have to adjust. There are times when I realize I need to take on a more adaptive role, focusing on collaboration and planning, because my preference is to ideate and innovate.

For Lucia, when a project shifts from the ideation phase to the implementation phase, that's when she knows that it's time for her to adapt and rely on others who are better at planning and executing. Another innovative evalpreneur Ella (KAI=116) reflected on a situation when she had a supervisor who gave very clear directions on how to do the work, before starting her firm. Ella explained that this situation led her to have tension because she had a strong desire for autonomy. For example, "we would have meetings where we seemed to be on the same page with my supervisor, discussing shared goals for the project. But when I return with an idea or approach that was more novel, I would be shot down", Ella explained. "I think I was trying to innovate, but my supervisor was more inclined toward sticking to a pre-established template that just required updates, rather than creating something entirely new", Ella further noted. This tension led Ella to cope adaptively.

Sage (KAI= 122) also shared that managing her firm often requires her to take on tasks that fall outside her preferred style, particularly those that are highly detail-oriented:

Running my firm requires me to handle things that are outside of my preferences, things that are often very detail-oriented. For example, I oversee finances and operations, which, honestly, can sometimes feel like torture for me. The level of detail involved just isn't where I feel most comfortable, but I understand it's essential for compliance and stability. To cope with this, Sage I set aside time—usually on quiet Saturday mornings, free from distractions, meetings, or constant emails—to focus on these tasks.

In this scenario, Sage experiences frustration because her broader vision sometimes leads her to believe that things could be accomplished without all the meticulous planning. Similarly, Zane (KAI=116) described a comparable situation where he, too, struggled with tasks that required more structure than he preferred. Zane shared,

I had to cope when I was handling financial tasks and project management in my business. Normally, I would prefer to find an innovative approach or system that works best for me, but I had to adapt to existing methods and processes to create routines and habits that would keep me on track. For example, when I was working on understanding the numbers in my business, such as cash flow, employee count, projects, and clients, it required me to adapt and borrow from other successful methods since I didn't have a pre-existing system.

In this situation, Zane realized that, as a business owner, he needed to adapt when confronted with new challenges that pushed him beyond his usual problem-solving style. For example, managing financial tasks or responding to unexpected business needs required him to rely on more structured routines. Although he didn't have a system in place, he quickly understood that to maintain stability, he had to become more organized and methodical than he normally preferred. "It became clear that if I wanted to keep things stable, I had to adapt and embrace more structure than I typically would," he explained

A strongly innovative evalpreneur, Tara (KAI=147), reflected on the challenge of implementing work plans developed by others. "One of the situations I often encounter is needing to carry out plans that don't align with my own approach or preferences," she explained. "I might think, 'This isn't how I would recommend doing this,' or 'This method doesn't feel

effective to me.” Despite this, Tara acknowledged the effort her team puts into such plans and their belief in the chosen direction. Her initial reaction is often avoidance—delaying or procrastinating because the approach feels misaligned with her natural style. “In those moments, I get frustrated and crabby. I tend to clash more with others when I’m working outside my preferred way of doing things,” she admitted.

In contrast, Skylar (KAI=117) described data analysis as a situation that regularly requires her to cope outside her preferred style. “You can’t just take a linear approach, you have to think holistically—what’s missing, what hasn’t been considered, or what data isn’t there that could be just as important as what is”, she explained. While she recognizes the importance of this type of thinking, Skylar described it as mentally draining: “It reminds me how essential it is to balance coping behavior with my preferred ways of working. If I stay in adaptive mode too long, it feels soul-sucking”. “I need opportunities to engage my brain differently, so I don’t get stuck or overwhelmed”, she added.

These findings illustrate that innovative evalpreneurs face various challenges that push them beyond their natural problem-solving preferences. Whether dealing with administrative tasks, working within rigid structures, or implementing others' plans, these evalpreneurs engage in coping behavior that let them adapt, manage tension, and maintain stability.

Theme 5.

Emerging six sub-themes illustrate the nuanced ways coping behavior manifests in both adaptive and innovative evalpreneurs

In-depth interviews revealed six sub-themes that illustrate the nuanced ways coping behavior manifests in both adaptive and innovative evalpreneurs. Following initial accounts of coping experiences, participants responded to follow-up questions designed to explore the coping sub-constructs as suggested by Samms and Friedel (2013). In line with the observed behavior of the OSBP model as well as introspection and interaction (Anderson et al., 2018), participants reflections focused on the direction of their coping (adaptive or innovative), the extent to which their responses were planned or spontaneous, and the thoughts and emotions that accompanied those moments. Interaction-based reflections explored how others may have perceived their coping efforts and what feedback they received from their environment. Together, these insights form the basis for the central theme and six emergent sub-themes, highlighting coping as both a strategic and situationally driven process shaped by one's preferred style, context, and social dynamics.

Sub-theme 1. All interviewed evalpreneurs—regardless of whether they were adaptive or innovative described a tendency to cope more adaptively

When discussing the direction of their coping strategies, all interviewed evalpreneurs—regardless of whether they were adaptive or innovative described a tendency to cope more adaptively when facing professional challenges. Among innovative evalpreneurs, this inclination may be linked to their mid-range SE sub-scores (18–31), which suggest a balanced, methodical approach to problem-solving (Kirton, 2011). Tara, the most innovative evalpreneur interviewed, shared, “In stressful situations, my response is more about managing my discomfort than pushing for an innovative solution. I find myself relying on familiar patterns, even though they're not always the most productive.” Similarly, Lucia (KAI=124) noted that while her strength lies in ideation, she often shifts toward more structured collaboration during project implementation:

“Although I’m naturally inclined to innovate and generate many ideas, I recognized the need to collaborate with others who had the planning and execution skills I lacked.”

Adaptive evalpreneurs also described coping more adaptively—by leaning further into structure, familiarity, or methodical planning. For example, Mira (KAI=82) explained, “I was comfortable adapting and taking a more structured approach, which complements my collaborator’s innovative style.” Melody described a similar experience when working in an environment with others who were more adaptive than herself. Even when adaptive evalpreneurs were pushed to behave outside their preferred adaptive styles, they tended to ground their responses in familiar frameworks. Serena (KAI=79) described one such instance:

The situation forced me to think outside the box... I borrowed methodologies from other sectors and applied them in a way that fit the unique context of this project. So, while I was innovating, I grounded those innovations in tried-and-tested frameworks I could adapt to the situation.

Serena’s decision to return to tried-and-tested frameworks reflects a clear inclination to revert to her adaptive preference.

Sub-theme 2. Among adaptive and innovative evalpreneurs, coping behavior was a blend of preparedness and spontaneity, shaped by personality, context, and experience

Interview data reveal that both adaptive and innovative evalpreneurs navigate coping with a blend of preparedness and spontaneity, shaped by personality, context, and experience. Among the eight innovative evalpreneurs, responses varied: two (Lucia (KAI =124) and Sage (KAI =122) described their approach as a mix of both, two (Brooke (KAI =125) and Tara (KAI =147) felt prepared, and four relied on spontaneous coping. Tara, for instance, explained that she is "much more prepared to cope" because she has intentionally created a work environment that aligns with her preferred style, reducing the need for reactive coping. Brooke adjusts her preparation depending on the task: for more detailed work, she ensures a distraction-free

environment, while for other tasks, her preparation is mental—reminding herself to slow down and double-check her thinking. Lucia and Sage combine both approaches: Lucia adapts quickly at the moment, relying on strategies she's developed over time, while Sage prepares but becomes more spontaneous under pressure. Those who coped spontaneously shared responses like, "I don't prepare for it; it's something I respond to at the moment" (Ella, KAI =116), "It was a response to the unexpected difficulty of the situation" (Zane, KAI =116), and "I hadn't planned for this kind of challenge, and it took me by surprise" (Faye, KAI =127).

Adaptive evalpreneurs showed a similarly diverse range of coping readiness. Mira (KAI = 82) expressed high confidence in her preparedness, by saying: "I think I'm always prepared to cope—it's something I've learned to do over time." Others, like Clara (KAI = 78) and Vivienne (KAI = 83), leaned more toward spontaneous coping, relying on experience and team dynamics to guide their response in real-time. Clara explained, "As an entrepreneur, you're not always fully prepared for these moments. Sometimes, you just have to dive in and adapt as you go." Meanwhile, Serena and Melody (both KAI = 79) described a blended approach. Melody shared, "I prepare when I know what to expect, but with new people or clients, it becomes more spontaneous—and more stressful." Despite spontaneity, Serena often grounded her coping responses in familiar frameworks, signaling a return to her adaptive preference once stability was restored.

Overall, these findings suggest that, regardless of cognitive style, evalpreneurs tend to rely on more adaptive strategies when coping, favoring structure, collaboration, and established methods as anchors in uncertain or demanding situations.

Sub-theme 3. In situations requiring coping behavior, both adaptive and innovative evalpreneurs tend to employ strategies aligned with their preferred problem-solving styles

. Interview data reveal that in situations requiring coping, both adaptive and innovative evalpreneurs tend to draw on strategies aligned with their preferred cognitive styles, shaped by the specific demands of the context. Among innovative evalpreneurs, coping often involved adapting their preference for idea generation to meet more structured, implementation-oriented demands. Lucia (KAI = 124) reflected on the balance required in leadership, stating, “I think about the need to balance my leadership approach—when to lead and when to let others take the lead, especially if the situation requires a different skill set.” Similarly, Brooke (KAI = 125) emphasized the importance of accommodating diverse cognitive approaches in team settings, noting the challenge of navigating problem-solving differences. Zane (KAI = 116) adopted a systems-focused strategy, implementing weekly meetings and Key Performance Indicators (KPIs) to manage uncertainty and ensure business stability. Skylar (KAI = 117) also acknowledged the value of complementing her innovative approach with more adaptive strategies, highlighting the need for balance in collaborative environments. Tara (KAI = 147), the most innovative evalpreneur in the study, approached coping with a task-focused mindset, stating, “I remind myself that it’s time-limited, and I’ll be able to move on to something I prefer soon.” Her strategy underscores a pragmatic acceptance of temporary discomfort as she navigates tasks that fall outside her preferred innovative style.

In contrast, adaptive evalpreneurs reported coping strategies that prioritized structure, deliberate planning, and incremental progress—reflecting the methodical and risk-averse tendencies characteristic of the adaptive problem-solving style described by Kirton (2011). Clara (KAI = 78) described her approach as focusing on “the next smallest actionable step,” a tactic that helped her break complex challenges into manageable parts. Vivienne (KAI = 83) shared that high-stress situations prompted her to reassess her mindset and reconnect with values like

collaboration and community engagement. Mira (KAI = 82) described coping through careful self-regulation and boundary-setting: “What can I contribute versus what I can’t control?” Serena (KAI = 79) relied on a methodical process of organizing data to inform larger evaluation frameworks, reflecting a trial-and-error mindset rooted in structure. Melody (KAI = 79) emphasized the importance of preparation and mental transitions between tasks, highlighting the cognitive energy required for adaptors to engage in spontaneous or high-flexible work modes.

Taken together, these narratives support the A-I theory that coping is cognitively taxing and often requires individuals to temporarily shift away from their preferred styles (Kirton, 2011). However, how this shift occurs remains aligned with each evalpreneur’s preferred styles. Innovative thinkers manage coping behavior through structured support or reframing tasks, while adaptive thinkers lean into incremental planning, preparation, and value-driven action (Samms & Friedel, 2013). These findings align with Samms and Friedel’s (2013) assertion that adaptors seek stability through deliberate change, whereas innovators manage discomfort by adjusting how they approach constraints.

Sub-theme 4. Both adaptive and innovative evalpreneurs described coping experiences as emotionally complex, involving a blend of stress, frustration, and empowerment

Both adaptive and innovative evalpreneurs described coping experiences as emotionally complex, involving a blend of stress, frustration, and empowerment. While their responses varied depending on preferred problem-solving style and situational demands, a common thread was the emotional and mental energy drain of operating outside one’s preferred style.

Among innovative evalpreneurs, coping often involved frustration with structured or detail-heavy tasks but was also described as a growth opportunity. For example, an innovative evalpreneur Lucia (KAI = 124) described the feeling as “empowering,” while Brooke (KAI = 125)

explained that work “doesn’t get easier, but it feels like a weight has been lifted.” For Brooke, the key was feeling at peace with her decisions and the process she went through. Another innovative evalpreneur Zane (KAI score=116) found coping behavior to be “relieving,” especially when completing tasks that initially seemed overwhelming, giving him a sense of accomplishment and control. The innovative Sage (KAI = 122) also noted that coping “makes me feel grounded and aware,” though she acknowledged that it’s not always easy, as it can require a lot of emotional energy. However, it still gives her confidence in making the right decisions for the team.

Ella (KAI score=116), on the other hand, shared that she doesn’t typically feel stressed when coping more adaptively, having learned to view challenges as opportunities for growth rather than stress-inducing obstacles. For Faye (KA score=127), coping was “incredibly frustrating at times” and “challenging.” Skylar (KAI score=117) found it “frustrating” at times but also an opportunity for self-reflection, asking herself, “What am I not seeing? What am I missing?” Tara (KAI score=147) described coping as “just kind of annoying,” noting how she feels physically tense and stressed, adding, “I feel it, or I’ll have a hard time paying attention.”

Adaptive evalpreneurs likewise described a spectrum of emotional responses to coping, often marked by initial stress or discomfort—especially when faced with uncertainty or unfamiliar work dynamics. Yet, as they adapted and found their footing, these experiences often evolved into a sense of empowerment, increased productivity, and relief. For example, Clara (KAI score=78) described feeling “a bit stressful at first,” but as she moved forward, it became “empowering” and energizing as she built momentum. As Clara mentioned,

It felt a bit stressful at first, especially because the pressure was on. But once I started moving forward with the new approach, I felt empowered. It felt like I was building momentum, which made me feel productive. Even though it wasn’t easy at the time, it

became energizing. I felt like I was progressing and figuring it out as I went along. There's a sense of empowerment when you see that your actions are making a difference

Vivienne (KAI score=83), on the other hand, found the experience mentally exhausting, as

"spending so much mental and emotional energy just coping" left her feeling unproductive and unhealthy. She noted

It felt tense. I couldn't perform at my best because I was spending so much mental and emotional energy just coping with the environment. It was mentally exhausting. I didn't feel productive in a meaningful way. It felt unhealthy being under such stress.

Mira (KAI = 82) on the other hand, noted initial discomfort and anxiety, but as she adapted, her anxiety decreased, and she became more comfortable with differing working styles, focusing on supporting her collaborators. She explained

It makes me feel a bit uncomfortable at first. It creates a certain level of anxiety because it's a different way of working than I'm used to. However, once I see that the other person is successful and productive in their style, my anxiety diminishes. I began to accept that we just work differently and it's okay... my goal is to contribute where I can, while also respecting the other person's approach to focus on getting things done while still supporting my collaborator's style.

As for Serena (KAI =79), she felt both "stressful and energizing," with the lack of structure causing anxiety at first, but later found satisfaction in overcoming the challenge. She reflected

It felt both stressful and energizing. The lack of structure initially caused a lot of anxiety because I couldn't rely on the usual tools and documentation. But at the same time, the challenge felt like an opportunity for growth. Once I started finding my rhythm and getting some initial insights, it became more rewarding. There was a sense of relief in realizing that, even though this wasn't the ideal way to approach things, I could still produce valuable results. It was a balance of feeling discomfort from the uncertainty, but also satisfaction from the creativity required to overcome it.

As she shared, Melody (KAI = 79) also found the experience energizing yet physically taxing, balancing the stimulation of problem-solving with the need for downtime afterward to stay productive.

It feels energizing in that moment because idea generation and problem-solving can be very stimulating. At the same time, it's physically taxing. So, it's a mixed feeling, it's both draining and energizing. I enjoy the challenge, but I also need to balance it with time

to recharge afterward. When I get that downtime, it helps me stay focused and productive throughout the day.

In summary, regardless of one's style, evalpreneurs reported that coping behavior comes with an emotional cost—but also offers opportunities for growth, creativity, and deeper self-awareness.

Sub-theme 5. Among adaptive and innovative evalpreneurs, coping is not only a response to situational demands but also an ongoing learning process, a catalyst for personal and professional growth

When reflecting on their coping behaviors and what they might do differently, both adaptive and innovative evalpreneurs emphasized the importance of earlier self-awareness, clearer communication, and better alignment with collaborators and contexts. These insights reveal that coping is not only a response to situational demands but also a catalyst for personal and professional growth.

Among innovative evalpreneurs, many emphasized the importance of self-awareness and recognizing the value of diverse cognitive styles. For example, an innovative Lucia (KAI=124) reflected on her early career missteps and noted that starting reflective practice and seeking feedback earlier could have accelerated her growth. She noted: “I made a lot of mistakes along the way... but I would have appreciated the opportunity to grow more quickly.” Another innovative Brooke (KAI =125) echoed this, sharing that earlier appreciation of different problem-solving styles would have enhanced her leadership. She noted, “Both adaptive and innovative styles are important.” As for Zane (KAI=116), he felt his decisions, both good and bad, shaped who he is today and wouldn't change much, though he regretted not working harder on some decisions. Further, Sage (KAI =122) wished she had developed self-awareness earlier, saying, “I didn't fully appreciate the value of slowing down and reflecting.” Furthermore, Faye (KAI =127) regretted not stepping away from certain situations sooner, while Skylar (KAI =

117) wanted to work on her patience and communication. The strongest innovator, Tara (KAI =147) recognized the need to understand better why certain things frustrated her, wishing she had taken more personal responsibility to cope productively.

Adaptive evalpreneurs, in contrast, focused more on the value of pausing and reflecting, better communication, and aligning working styles with collaborators. For example, adaptive evalpreneur Clara (KAI =78) and Serena (KAI =79) both underscored the importance of taking a moment to pause before diving into coping. Clara noted, "I would have taken a moment to breathe and clear my mind", recognizing that this would have helped her gain more clarity and focus in stressful situations. Serena, similarly, emphasized the need for better organization and communication, explaining that being more systematic from the start and setting clearer expectations with the client would have alleviated stress and smoothed the process. Further, another adaptive evalpreneur Vivienne (KAI score=83), reflecting on her career shift to becoming an "evalpreneur," shared, "I would have left earlier. It was scary, but the freedom and fulfillment made it worth it." She encouraged others to take the leap sooner, cautioning that building more experience can lead to prolonged cycles of coping that drain energy. In contrast, Mira (KAI score=82) expressed contentment with her approach, stating, "I'm comfortable with my role as an adapter," and affirmed that she wouldn't change anything, as she prefers structured, orderly change.

Overall, these reflections reveal that coping is both a situational response and a developmental process—shaped by evolving self-awareness, leadership experience, and a growing capacity to navigate complexity. For both adaptive and innovative evalpreneurs, developing insight into their problem-solving preferences and learning to behave in and outside

them, emerged as a powerful way to transform coping from being mental and emotional energy draining into an opportunity for meaningful growth.

Sub-theme 6. Adaptive and innovative evalpreneurs believed their coping behavior were noticed by others while sometimes it went unnoticed by clients or team members

When asked if anyone noticed their coping behavior, the responses from innovative evalpreneurs varied. Lucia (KAI score=124) believed that only those who knew her well would notice, explaining, “Those who work closely with me probably noticed, but it’s not something I would draw attention to.” Brooke (KAI =125) viewed coping as an internal process, stating, “I’m not sure if people notice that I’m coping... but when I’m done, I feel relieved—a sense of accomplishment.” Zane (KAI =116) felt that while his team might notice how he handles stress and adapts, they may not recognize it as part of a coping strategy. Sage noted that people who know her well can tell when she’s coping, but others might not realize it, saying, “It might just seem like part of my regular approach to work.” Ella (KAI = 116), however, felt that people notice, as she tends to mention it openly. Faye shared that while clients didn’t recognize her coping, her team did, especially when she wasn’t acting in her usual collaborative style. Skylar agreed that her team notices when she’s stretching, while clients or family might not. Tara believed that while others might not notice in-depth, her open expression of frustration made it clear to those around her that she was coping.

Many adaptive evalpreneurs believed their coping behavior went unnoticed by clients or team members, often because these actions were integrated into regular work processes. However, coping was more visible to close colleagues or family members who were familiar with their stress levels and work styles. For instance, Clara (KAI score=78) and Serena (KAI

score=79) felt their coping went unnoticed, viewing their actions as natural problem-solving rather than something that needed to be labeled as coping. Clara mentioned that in her team, any adjustments she made were seen as part of the regular work process, while Serena noted that clients, who didn't have predefined expectations, focused solely on results rather than the methods she used. Vivienne (KAI score=83), on the other hand, felt her coping efforts were hidden because everyone was absorbed in their work. As a leader, she didn't want to show any signs of struggling and continued to work without paying attention to her coping. Mira (KAI score=82), however, noticed that people sometimes commented on her organizational skills, which she felt was linked to her coping behavior, though she found these remarks occasionally frustrating when others didn't understand the effort involved. Melody's (KAI score=79) husband noticed when she was coping, as they were open about their work styles, but she believed most colleagues didn't recognize it unless she showed visible frustration. Clarisa (KAI score=80) also felt that others could sense her coping, even if they couldn't specifically identify it.

Summary

Chapter four presented an analysis of the KAI psychometric inventory results and qualitative interview data from evalpreneurs to explore their problem-solving styles, identity factors, and demographic characteristics. Analyzing both the quantitative KAI scores and qualitative interview transcripts revealed five key themes. The KAI results showed a broad range of problem-solving styles, with participants exhibiting both adaptive and innovative preferences. Interviews highlighted that evalpreneurs perceive their problem-solving styles as integral to their expressed identity, particularly in teamwork and collaboration. Participants also expressed multiple intersecting identities, which influenced their work relationships. Additionally, some evalpreneurs experienced challenges in integrating their identities, while others demonstrated

coping behaviors when required to adapt to team demands. These themes provided insights into the varying coping behavior experiences and identity integration among the adaptive and innovative evalpreneurs. Discussion, the implication for practice, and Recommendations for future research, for each theme are outlined in chapter five.

Chapter Five

Conclusion

As discussed throughout the purpose of this research was to employ a cognitive lens, informed by Kirton's A-I theory (Kirton, 2011), to explore the expressed identity, coping behavior, and identity integration among adaptive and innovative US-based evalpreneurs. The intended outcome of this research was to fill a gap in existing literature by deepening the understanding of how evalpreneurs, as agents of change, approach problem-solving and experience coping behavior in various situations when operating their evaluation consulting business. This study further intended to highlight the unique experiences of evalpreneurs as they express multiple identities and integrate those identities when working with teams or other collaborative relationships. This chapter begins with a review of the problem statement, assumptions, research methodology, and the conceptual framework that underpinned this research. Following this, the findings from the data collected will be summarized and interpreted concerning the research questions. The chapter will conclude with a discussion of the implications of these findings for both practitioners and future research in the field of evaluation consulting.

Problem Statement

Evalpreneurship is an emerging field at the intersection of evaluation and entrepreneurship, drawing on principles from both domains to form a distinct academic and professional identity (Sabarre, 2021). Evalpreneurs are individuals who not only conduct evaluations but also manage evaluation consulting businesses—balancing the dual roles of evaluator and entrepreneur. As Sabarre (2021) notes, this field holds transformative potential: Evalpreneurs are positioned to challenge traditional paradigms in the marketplace, including

systems of power and dominance such as white supremacy (Shalwani & Dossa, 2023). However, while much attention has been given to what evalpreneurs do—producing evaluations and running businesses—less is known about *how* they operate cognitively as problem-solvers and change agents.

According to Kirton’s A-I theory, all individuals engage in problem-solving, but their approach differs depending on whether they are more adaptive or more innovative (Kirton, 2011). Adaptive individuals prefer more structure, incremental change, and improvements to existing systems, while innovative individuals prefer less structure, radical change, and to disrupt existing systems (Friedel, 2014). This theory is especially relevant to entrepreneurs, who are often assumed to be inherently innovative (Buttner & Gyskiewicz, 1993). Yet, empirical research challenges this assumption. In a study of Italian entrepreneurs, Previde and Kirton (2021) found that many business founders were more adaptive or mid-range in their problem-solving styles, illustrating that innovation and entrepreneurship are not synonymous. Despite these insights, there remains a significant gap in understanding the problem-solving styles of the entrepreneurs (Buttner & Gyskiewicz, 1993), particularly the evalpreneurs, whether they are adaptive or innovative. Literature further highlights a need to understand how these preferences influence their behavior and their expressed identity (Anderson et al., 2018). This gap is especially notable given that the evaluation field places unique demands on consultants, such as navigating complex client relationships and managing data-driven deliverables that may be inherently easy for the more adaptive problem-solving styles.

Three specific research gaps motivate this study. First, literature suggests that problem-solving style is a hidden aspect of identity—that influences how individuals behave, make decisions, and collaborate in teams (Anderson, 2021, 2023). Yet, little is known about how

evalpreneurs' problem-solving styles influence their day-to-day consulting practices, behaviors, and decision-making (Buttner & Gyskiewicz, 1993). As Buttner and Gyskiewicz (1993) further suggested, coping behavior, –defined as intentional behavior outside one's preferred style, should be studied in entrepreneurial contexts as in other fields like evaluation. As Friedel (2014) further noted, there is limited research on coping behavior and the management of cognitive diversity, particularly in how the gap between problem-solving style and behavior is addressed. Hence, how evalpreneurs manage this gap between style and behavior remains largely unexplored.

Second, there is growing interest in how problem-solving styles influence collaboration and team dynamics (Anderson, 2023). Anderson (2023) found that problem-solving style plays a critical role in how individuals work with others, particularly in team settings. Since many evalpreneurs collaborate with other consultants (Maack & Upton, 2006; Sabarre, 2021), understanding how style differences influence team dynamics and collaborative relationships remains a research gap as research on this topic is limited. The third research gap concerns the integration of problem-solving style with other forms of expressed identity (Anderson et al., 2018). Cheng et al. (2008) examined the role of identity and diversity by asking, "How does diversity affect individuals and the groups in which they are embedded?" (p. 1). Their work focused on the concept of Identity Integration (II), which refers to the perceived compatibility of multiple identities (Cheng et al., 2008). High identity integration occurs when two or more identities are easily combined or seen as complementary, while low identity integration reflects difficulty or conflict in reconciling different identities (Syed & McLean, 2016). However, little is known about how evalpreneurs experience the integration of multiple expressed identities in practice. Do they perceive alignment or tension between their problem-solving style and other

expressed identity? This question remains largely unexplored; hence it is a focus of this study. Understanding this integration is vital, as it can enhance leadership effectiveness, foster innovation in the evaluation field, and help create "identity workspaces" that support the professional growth of young and emerging evaluation professionals (Bennani et al., 2021).

Methodology

As described in Chapter 3, this study employed a qualitative research design was employed, guided by phenomenography methodological approach (Rolls, 2023). According to Rolls (2023), phenomenography allows for an in-depth exploration of how individuals in the adaptive and innovative groups of evalpreneurs experience their work, uncovering both the similarities and differences in their problem-solving preferences, coping behavior, and expressed identity integration. The intended outcomes of this phenomenographic study are to identify and characterize the unique problem-solving styles and coping behavior of evalpreneurs and to explore how their other expressed identities differ in the context of teamwork and other collaborative relationships in evaluation consulting.

A total of 32 evalpreneurs completed an initial survey to gather demographic information and factors influencing identity expression in collaborative relationships. Of these, 22 participants completed the Kirton Adaptation-Innovation (KAI) inventory, which was analyzed to understand problem-solving preferences compared to demographics. Based on their KAI scores, participants were categorized as either adaptive or innovative. Furthermore, 14 evalpreneurs (6 adaptive and 8 innovative) participated in semi-structured interviews. The interview data were analyzed using phenomenography, focusing on how problem-solving styles

and identity factors influenced teamwork, coping behavior, and identity integration. This analysis provided insights into how evalpreneurs navigate their identities in collaborative contexts.

Summary: A priori Assumptions

This study was guided by three *a priori* assumptions, supported by existing literature and aligned with the research questions, providing the foundational framework for exploring the problem-solving styles, identity integration, and coping behavior of evalpreneurs. These assumptions informed the data collection protocols and were integral to understanding how evalpreneurs navigate their professional environments and identities. The core assumptions underlying this study were:

1. Identity is intrinsically linked to the question, "How do I think, who am I?" (Kirton, 2011). To explore evalpreneurs' identities, the study leveraged Kirton's Adaption-Innovation (A-I) theory, a well-established framework for understanding problem-solving preferences (Friedel, 2023). According to the A-I theory, an individual's problem-solving style, assessed via the Kirton Adaption-Innovation Inventory (KAI), serves as a hidden dimension of their identity (Anderson, 2021). This study assumed that evalpreneurs' identity could be better understood by examining whether they lean toward adaptive or innovative problem-solving styles. In addition, to style, evalpreneurs' identities can be informed by other "I am" aspects of an individual that one chooses to express and how one chooses to be perceived by others in the social environment (Anderson et al., 2018).
2. Behavior Shaped by Identity: evalpreneurs may exhibit behavior that aligns with their preferred problem-solving style (referred to as "preferred behavior") or engage in coping behavior when adapting to social or professional demands (Kirton, 2011; Friedel, 2014).

Coping behavior occurs when an individual's actions deviate from their usual problem-solving style, either becoming more adaptive or innovative in response to situational demands.

3. Evalpreneurs navigate multiple, intersecting identities (e.g., evaluator, entrepreneur) that influence how they engage with their work and collaborators. The degree to which these identities are integrated varies, with some participants experiencing seamless integration (high II) and others facing conflicts between their identities (low II) (Cheng et al., 2008)

These foundational assumptions were key to addressing the research questions and guiding the study's examination of the adaptive and innovative problem-solving styles, identity integration, and coping strategies of evalpreneurs.

Purpose & Research Questions

The purpose of this research was to employ a cognitive lens, informed by Kirton's Adaptation - Innovation (A-I) theory (Kirton, 2011), to explore the expressed identity, coping behavior, and identity integration among US-based evalpreneurs with adaptive and innovative problem-solving styles. Guided by the Organismic Social Behavior Perspective (OSBP) as a conceptual framework, this study will explore the evalpreneurs' narratives of their lived experiences in relationship to coping behavior, problem-solving styles and other expressed identities as well as how identity integration is experienced throughout introspection, interpretation and interaction with others in teams and collaborative relationships.

This qualitative study, supported by quantitative data including KAI scores and demographic survey data analyzed descriptively, was grounded in phenomenography (Rolls, 2023). This methodological approach aimed to explore the collective lived experiences,

similarities, and differences in the way adaptive and innovative evalpreneurs experience coping behavior, express identity, and integrate the expressed identities when working in teams and other collaborative relationships in evaluation consulting.

The intended outcomes of this study included highlighting the unique experiences of evalpreneurs as they express multiple identities and integrate those identities, and cope in various situations when operating their evaluation consulting business and working with teams or other collaborative relationships. The research questions guiding this study were framed as follows:

- 1) What are the problem-solving styles and identity factors of evalpreneurs?
- 2) In what way do the more adaptive and innovative evalpreneurs integrate their identities, especially in teamwork and group dynamics?
- 3) How are coping behavior evidenced among the more adaptive and more innovative evalpreneurs, comparatively?

This study analyzed interview data from evalpreneurs running formal evaluation businesses, both for-profit and nonprofit, in the U.S. It explored the similarities and differences between adaptive and innovative evalpreneurs, focusing on aspects like identity, the usefulness of learning the KAI (Kirton Adaptation-Innovation Inventory), and teamwork. The research examined how problem-solving styles relate to identity, expressed identities, and identity integration in practice.

Additionally, the study identified various coping dimensions including differences in coping direction, preparedness, emotional responses, and awareness of others during coping.

Significance of Study

Evalpreneurs are not just evaluation practitioners, they are entrepreneurial market actors who actively influence how evaluation is defined, commissioned, and applied. Their business decisions, client engagement strategies, and organizational models shape not only what evaluation looks like, but also how it is valued and used in different sectors. As noted by Sabarre (2021), evalpreneurs directly impact both the supply and demand for evaluation services, positioning them as agents of change in the field's ongoing evolution. As Sabarre (2021) further noted, evalpreneurs have the agency to reshape the scope, purpose, and delivery of evaluation, influencing not just its technical and methodological aspects, but also its cultural and systemic dimensions, including how it is framed, who it serves, and how it adapts to changing external conditions.

This study focuses on understanding the stable cognitive styles that guide how evalpreneurs approach creativity, solve problems, and drive change as agents of change. As Kirton (2011) suggested, distinguishing between adaptive and innovative problem-solving styles provides valuable insight into how evalpreneurs lead, collaborate, and navigate uncertainty, adapting to the changing organizational, socio-political, and global business environment. Adaptive evalpreneurs prioritize stability, structured processes, and incremental change, thriving in environments that value predictability. In contrast, innovative evalpreneurs embrace ambiguity, experimentation, and system-level transformation, often driving bold, disruptive change. These styles can influence our understanding of how evalpreneurs respond to market disruptions, design services, and interact with clients.

This study offers meaningful implications for evaluator training, leadership development, and team formation by highlighting the importance of balancing adaptive and innovative

problem-solving styles, particularly in leadership. As evaluators and other professionals increasingly confront complexity and uncertainty, many lack the necessary skills in creativity, coping, and problem-solving (Barrington, 2011; Sheffield, 2019). While this study does not aim to close that skills gap entirely, it introduces the KAI inventory as a useful tool for improving self-awareness and guiding the development of these essential skills. In team formation, KAI can help leaders build cognitively diverse teams and manage those differences more intentionally. As Sabarre (2021) emphasized, diversity in thinking strengthens internal operations and contributes to sustainability. In her study, Sabarre (2021) included a quote from an evalpreneur who shared: “It can’t ever be about me because it’s not sustainable that way... I want a diverse team with different strengths and ideas—people who challenge me. That helps my business thrive” (p. 68). For evalpreneurs, this study emphasizes the importance of cognitive diversity to effectively nurture and sustain their teams, especially in solving Problem A and Problem B. Embracing the complementary strengths of adaptive and innovative styles equips leaders to build resilient, collaborative teams and foster more stress-free evaluation workplaces.

As literature has shown, management of such diversity may incur substantial costs, since the cost of working away from one’s preferred style increases as the intensity (distance from one’s preferred style) and duration increase during coping behavior (Samms & Friedel, 2013). Evalpreneurs may employ a variety of coping and identity integration approaches, often defying simple categorization into adaptive or innovative styles. Understanding these strategies provides key insights into: (a) the emotional and cognitive challenges evaluators face, (b) the hidden labor and cognitive diversity that influence evaluation leadership, and (c) how evaluation practices either adapt to or resist change in times of uncertainty. In the marketplace, the study will help understand how evalpreneurs may behave according to their problem-solving styles (preferred

behavior) or outside their preferred styles (coping behavior) as they are presented with shifts in the evaluation supply and demand or budget cuts like we are experiencing right now in the United States and across the globe due to USAID funding cuts to international development. For instance, in the current shifts within the evaluation consulting landscape, adaptive people may feel uncomfortable because they need clear instructions and structure, while innovative people may thrive in ambiguity, taking the initiative and generating new ideas to navigate through this problem. The findings on coping behavior will reveal why some evalpreneurs thrive in certain environments while others may experience stress, frustration, burnout, or disengagement (Friedel, 2014). These findings will offer critical implications for improving both organizational practices and the broader evaluation field's adaptability in times of change.

Given the individual differences in how people express and integrate their multiple identities (Cheng et al., 2008), this phenomenographic study provides fresh perspectives on how adaptive and innovative evalpreneurs integrate their multiple identities. This study focuses on expressed identity (Anderson et al., 2018), and identity integration is quite new to the field of evaluation and evalpreneurship. In evalpreneurship, where individuals often navigate overlapping roles as evaluators, entrepreneurs, consultants, and leaders, there are many other unknown aspects of their identity that this study will reveal. This study will further provide information on the various expressed identities and practical experiences of identity integration among adaptive and innovative evalpreneurs, which will contribute to the field and scholarship on identity integration. Finally, this is a pioneering study of expressed identity and identity integration in evalpreneurship, it provides the foundation for future studies and will offer reflective practice for the evalpreneurs.

Discussion

This study, grounded in Kirton's (2011) A-I theory, explored the problem-solving styles of evalpreneurs—leaders of evaluation businesses—and explored how their coping behavior and multiple identities are expressed and integrated within their professional contexts. While the identity of being an evalpreneur might imply a simple blend of evaluator and entrepreneur, participant narratives revealed a much more complex intersection of identities. The KAI data further supported this, showing a wide range of problem-solving styles, from strong adaptive to highly innovative, underscoring that evaluation entrepreneurship is not limited to a single cognitive profile.

Several key themes emerged from the findings. As described in Chapter Four, five main themes emerged from the thematic and comparative data analysis. As described in this chapter, the following emerging themes aligned with research questions and the OSBP conceptual framework and guide the discussion, implications for practice, and recommendations:

(1) Individuals see alignment of problem-solving style and their personality, but not always an aspect of identity. This theme aligns with Research Question #2, and with the expressed identity, introspection, and interpretation of the OSBP conceptual model. More specifically, this theme reveals the problem-solving styles of evalpreneurs which is part of the cognitive effect (In what way I plan), an integral part of the cognitive function and expressed identity (Kirton, 2011; Anderson et al., 2018). Through introspection, participants reflected on their problem-solving styles as adaptive or innovative and through interpretation, they evaluated and assigned meaning to their style as central to their professional identity, particularly in teamwork and collaborative relationships.

(2) Both adaptive and innovative evalpreneurs hold and express multiple intersecting identities that shape how they relate to their work and collaborators. This theme connects to Research Question #2 and is aligned with the expressed identity of the OSBP conceptual model that includes elements of the cognitive function Schema, namely. For example, participants described identity-related to what they know and lived experiences (cognitive resource) (Kirton, 2011) and identity in the cognitive affect such as participants' socio-cultural norms, values, belief systems (Anderson, 2023). This theme reveals through introspection the evalpreneurs' internal reflection (self-analysis) of their problem-solving styles as adaptive or innovative and their other "I am" aspects of their identity that they choose to express and be perceived by others (Anderson et al., 2018). Through interpretation evalpreneurs evaluated and assigned meaning to their styles and other expressed identity based on how their teams perceived them as well as their other social networks in collaborative relationships in evaluation consulting.

(3) Both adaptive and innovative evalpreneurs often integrate aspects of their expressed identities into their collaborative evaluation consulting work in an ongoing and sometimes challenging process, where some identities complement each other (high II) while others conflict (low II). This theme connects to Research Question #2 and aligned with the introspection, interpretation and interaction process outlined in the OSBP conceptual model (Anderson et al., 2018). This theme expands on the findings about expressed identity identified in theme two. Through interpretation, participants evaluated and assigned meaning about the identified identities in teamwork and collaborative relationships, and through interaction, they reflected on the social identity and team dynamics in their collaboration interactions within evaluation consulting. Through introspection, participants reflected on their practical experiences on how

two or more identities were easier to integrate and complementary (high II) or were in conflicts or harder to integrate (low II) (Cheng et al., 2008).

(4) Evalpreneurs described evidence of behaving outside their preferred problem-solving style (coping behavior) as a response to environmental and team demands in the evaluation consulting context. This theme aligns with Research Question #3 and connects with the OSBP conceptual framework, particularly regarding observed behavior—both preferred and coping behavior (Anderson et al., 2018). Participants engaged in introspection, reflecting on instances when they recognized the need to employ coping behavior. This theme specifically addresses coping behavior, which involves actions taken outside one's preferred style to meet external demands (Kirton, 2011). When describing situations where evalpreneurs had to use coping behavior, aspects of environmental feedback (EF) were evident. This EF captured how others, particularly team members and the external environment, responded to an individual's observed behavior.

(5) Emerging six sub-themes illustrate the nuanced ways coping behavior manifests in both adaptive and innovative evalpreneurs. This theme aligned with Research question #3, a follow-up of theme 4, and it aligns with the observed behavior of the OSBP model as well as introspection and interaction. Through introspection, participants reflected on the coping direction as either adaptive or innovative, the level of preparedness or spontaneity, as well as thoughts and emotional responses to coping. Through interaction, evalpreneurs were asked to reflect on the environmental feedback of their coping behavior, whether they think others noticed their coping behavior. Sometimes, this reflection went beyond the evalpreneurs' internal team to their social groups, social networks, and collaborative relationships in evaluation consulting. In this theme, six sub-themes were identified:

Sub-theme 1- All interviewed evalpreneurs—regardless of whether they were adaptive or innovative described a tendency to cope more adaptively.

Sub-theme 2- Among adaptive and innovative evalpreneurs, coping behavior was a blend of preparedness and spontaneity, shaped by personality, context, and experience.

Sub-theme 3- In situations requiring coping behavior, both adaptive and innovative evalpreneurs tend to employ strategies aligned with their preferred problem-solving styles.

Sub-theme 4- Both adaptive and innovative evalpreneurs described coping experiences as emotionally complex, involving a blend of stress, frustration, and empowerment.

Sub-theme 5- Among adaptive and innovative evalpreneurs, coping is not only a response to situational demands but also an ongoing learning process, a catalyst for personal and professional growth.

Sub-theme 6- Adaptive and innovative evalpreneurs believed their coping behavior were noticed by others while sometimes it went unnoticed by clients or team members

The following section discusses each of the research questions and themes in-depth, implications for practice, and concludes with recommendations for advancing research and professional development in the field.

Research question one: What are the problem-solving styles and identity factors of evalpreneurs?

This research question aligned with the OSBP conceptual framework, exploring how evalpreneurs' problem-solving styles and identity factors contribute to their expressed identity (Anderson et al., 2018). The research began by surveying the demographic characteristics building on the evalpreneurs' survey by Sabarre (2021), expressed identity factors (Anderson et

al., 2018), and problem-solving styles of thirty-two evalpreneurs, utilizing the KAI psychometric measure of problem-solving and creativity (Kirton, 2011). The survey revealed a homogeneous group of participants, with most being highly educated, female, and holding a wide range of experience in the evaluation field. The survey findings align with Sabarre's (2021) findings on evalpreneurs, that these leaders often engage in partnerships, subcontracting, and teams, inclusive social networks. The survey examined expressed identity factors such as educational background, prior experiences, knowledge, skills, beliefs, gender, and race, which relate to cognitive resources and the cognitive affect of Kirton's Cognitive Function Schema (Kirton, 2011; Anderson et al., 2018). Consistent with Anderson et al. (2018)'s findings, the survey findings revealed that socio-cultural factors like gender, social class, and ethnicity, were considered relevant by most evalpreneurs. A notable finding was the emphasis on values such as social justice, with some evalpreneurs explicitly stating that their commitment to equity guided their professional work, reflecting how personal beliefs and values influence professional identity.

The problem-solving styles of evalpreneurs, as measured by the KAI, further revealed the cognitive diversity within the group. The KAI scores ranged from 78 to 150, with a clear division between adaptive and innovative problem-solving styles. Consistent with Kirton's (2011) A-I theory, those with lower KAI scores (78-89) demonstrated adaptive problem-solving preference. These adaptive evalpreneurs prefer to work within consensually agreed upon systems and structures and tend to focus on improving efficiency and "doing things better" when solving problems (Friedel, 2014; KAI Foundation, 2022). As KAI Foundation (2022) further characterizes adaptive evalpreneurs, they excel at refining systems and ensuring procedural compliance, generate fewer but more practical solutions, and are essential for maintaining stable,

ongoing operations in organizations. Conversely, evalpreneurs with higher KAI scores (102-150) displayed innovative problem-solving preferences, characterized by a preference to solve problems by doing things differently (Friedel, 2014; KAI Foundation, 2022). Consistent with Friedel (2014), these more innovative evalpreneurs tend to take charge in unstructured environments, and produce many ideas that may be radical, impractical, or not immediately acceptable.

The survey and KAI data helped to recruit an equal number of adaptive and innovative evalpreneurs to be used in this phenomenography study (Rolls, 2023). Among the 14 evalpreneurs who advanced to the final stage of the study, KAI scores ranged from 78 to 147 ($M = 107.79$, $SD = 21.9$), illustrating a broad spectrum of cognitive problem-solving styles. Six participants were more adaptive—Clara (KAI=78), Serena (KAI=79), Melody (KAI=79), Clarisa (KAI=80), Mira (KAI=82), and Vivienne (KAI=83). Their KAI sub-scores also indicated adaption across SO, SE, and SRG, reflecting a preference for structure, practicality, and adherence to established systems. For example, Clara's sub-scores (SO: 36, SE: 10, SRG: 32) and Serena's (SO: 33, SE: 13, SRG: 33) demonstrate a cognitive style oriented towards incremental improvement, careful planning, and operational consistency (KAI Foundation, 2022). These adaptive evalpreneurs are likely to approach evaluation with systematic precision, excelling at refining procedures and maintaining order within existing frameworks (Kirton, 2011). The remaining two evalpreneurs had mid-range KAI scores (KAI=90 and KAI=91), indicating a mixed approach to problem-solving preference.

In contrast, eight evalpreneurs exhibited innovative problem-solving styles, which included Zane (KAI=116), Ella (KAI=116), Skylar (KAI=117), Sage (KAI=122), Lucia (KAI=124), Brooke (KAI=125), Faye (KAI=127), and Tara (KAI=147). Their KAI sub-scores

were notably more innovative across all sub-scores, especially in SO and SRG, signaling a strong tendency to generate more ideas, break from convention, and seek transformational change. For instance, Tara, the most innovative participant (SO: 62, SE: 31, SRG: 54), displayed a cognitive profile characterized by innovative creativity, risk tolerance, and low conformity to rules (Kirton, 2011). Similarly, Faye (SO: 55, SE: 23, SRG: 49) and Lucia (SO: 54, SE: 25, SRG: 45) demonstrated a stylistic approach to innovative originality and a willingness to challenge existing systems. These innovative evalpreneurs, who are cognitively inclined to push boundaries, embrace complexity, and develop unconventional strategies, align with Kirton's (2011) conceptualization of innovative thinkers. This innovative style of evalpreneurs may explain Sabarre's (2021) findings that evalpreneurs have the potential to disrupt traditional business paradigms and challenge systems of power and dominance, including white supremacy, in the evaluation and international development (Shalwani & Dossa, 2023).

Implications for Practice. Exploring the problem-solving styles has direct implications for how evalpreneurs shape the supply and demand for evaluation services. As Sabarre (2021) noted, evalpreneurs are not just evaluation service providers; they are market actors influencing how evaluation is defined, commissioned, and used. Adaptive evalpreneurs may respond to market disruption by reinforcing trusted practices and meeting existing funder requirements efficiently, providing a sense of stability in uncertain times (Friedel, 2014). Innovative evalpreneurs, on the other hand, often seize disruption as an opportunity to create new offerings, enter emerging markets, or challenge dominant paradigms—including those rooted in white supremacy and traditional power structures (Shalwani & Dossa, 2023). Their willingness to innovate may lead to entirely new models of evaluation that better reflect one's values, knowledge, style, or other preferences.

Another implication, understanding the problem-solving styles and behavioral characteristics of evalpreneurs offers critical insight into how they navigate and respond to social, political, and economic change. As Kirton (2011) suggests, all humans are problem-solvers and agents of change; adaptive individuals often manage change by reinforcing structure, refining existing processes, and seeking incremental improvements (Fridel, 2014). This adaptive approach to change can stabilize evaluation practices during periods of unprecedented change or market disruption. In contrast, innovative individuals tend to manage change by challenging established norms, and reimagining systems (Friedel, 2014). These stylistic differences matter not only for internal operations and team dynamics but also for how evalpreneurs position themselves in a competitive and evolving evaluation market. As Sabarre (2021) emphasizes, evalpreneurs influence both the supply and demand for evaluation services, shaping what is valued, commissioned, and delivered. Therefore, understanding whether an evalpreneur is more adaptive or innovative adds practical value for clients, collaborators, and funders by illuminating how evaluation approaches may vary—and how best to support and partner with leaders who bring distinct cognitive strengths to the field.

These insights show significant implications for evaluation professionals, evaluation-focused organizations (including evaluation consulting firms) and the broader evaluation marketplace. On an individual and organizational level, the findings support expanding evaluator training and leadership development to include structured reflection on both problem-solving preferences and identity factors. This could include practical application of KAI in building better teams, the problem-solving leadership, concepts of problem A and problem B in evaluation and many more. Teams can also benefit from using tools like the KAI to balance adaptive and innovative preferences across roles, improving collaboration and resilience.

Furthermore, hiring and collaboration strategies that recognize identity factors and cognitive diversity can help organizations assemble evaluation teams better equipped to navigate complex problems.

On a market level, understanding how evalpreneurs' problem-solving styles and identity factors influence how they enter, position themselves in, and respond to the demands of the evaluation sector can help explain broader trends. Problem-solving styles shape how leaders respond to change, manage ambiguity, and form client relationships. This has direct implications for how evaluation is conducted and used—impacting not only the quality of services delivered but also how inclusive, relevant, and transformational those services can be. In sum, recognizing and supporting the identity-informed leadership of evalpreneurs can strengthen the evaluation field's capacity to adapt, including diverse perspectives, and drive meaningful changes.

Recommendations for Future Research. This study provides an exploratory contribution to understanding the problem-solving styles of evalpreneurs through the cognitive lens using Kirton's A-I theory and the KAI. Prior research has shown no correlation between problem-solving style and demographics such as age, experience, or culture (Friedel, 2014; KAI Foundation, 2022), supporting the idea that these styles are personality-based and remain stable over time (Kirton, 2011). Kirton emphasized that personality traits shape how individuals prefer to structure problems and pursue change. To build on this qualitative exploration of problem-solving styles and expressed identity among evalpreneurs, future research should consider using larger and more diverse samples. Incorporating quantitative and mixed-methods approaches would strengthen the generalizability of findings and provide a more comprehensive understanding of the cognitive and identity-related dimensions shaping evalpreneurship.

This study builds on Sabarre’s (2021) pioneering work on evalpreneurship by focusing on the understudied leaders of evaluation businesses—evalpreneurs—and highlights the need for continued empirical research in this area. Although their presence in the field is growing, evalpreneurs leading evaluation firms have received limited scholarly attention. Future research could expand this foundation by applying alternative theoretical frameworks—such as leadership, entrepreneurship, or business theory—to complement the cognitive lens used in this study.

Research question two: How do the more adaptive and innovative evalpreneurs integrate their identities, especially in teamwork and group dynamics?

Theme 1.

Individuals see alignment of problem-solving style and their personality, but not always an aspect of identity

Understanding that evalpreneurs possess diverse problem-solving styles and express identity is essential for enhancing the effectiveness and sustainability of evaluation practice. This study reveals that evalpreneurs' approaches to leadership and collaboration are shaped not only by their adaptive or innovative problem-solving tendencies (as measured by the Kirton Adaption-Innovation Inventory), but also by how they express and interpret key identity factors—including race, gender, professional background, and life experiences. For example, Clara (KAI = 78) reflected on her identity as a white woman and made deliberate efforts not to center her whiteness in equity-focused work, stating, “I make a deliberate effort to step back and ensure I don’t center myself or my whiteness.” Similarly, Lucia (KAI = 127) described leveraging her

awareness of privilege to foster inclusion: “They’ll judge me based on how I look, how I talk, where I went to school.” These examples highlight how awareness of identity factors how evalpreneurs lead, collaborates, and shape their consulting practices.

These insights carry significant implications for organizations and the broader evaluation market. On an organizational level, the findings support expanding evaluator training and leadership development to include structured reflection on both problem-solving preferences and identity factors. This could help foster psychological safety, inclusive cultures, and self-aware leadership. Teams can also benefit from using tools like the KAI to balance adaptive and innovative tendencies across roles, improving collaboration and resilience. Furthermore, hiring and collaboration strategies that recognize identity factors and cognitive diversity can help organizations assemble evaluation teams better equipped to navigate complexity and promote equity. For solo or under-resourced evalpreneurs, identity workspaces and peer support mechanisms may offer emotional and strategic reinforcement, reducing burnout and promoting long-term engagement.

On a market level, understanding how evalpreneurs’ problem-solving styles and identity factors influence how they enter, position themselves in, and respond to the demands of the evaluation sector can help explain broader trends. Adaptive and innovative styles shape how leaders respond to change, manage ambiguity, and form client relationships. This has direct implications for how evaluation is conducted and used—impacting not only the quality of services delivered but also how inclusive, relevant, and transformational those services can be. In sum, recognizing and supporting the identity-informed leadership of evalpreneurs can strengthen the evaluation field’s capacity to adapt, including diverse perspectives, and drive meaningful change.

In line with the OSBP conceptual model of expressed identity, introspection, and interpretation (Anderson et al., 2018; Simpson et al., 2024), participants reflected on whether their problem-solving style (as adaptive or innovative), was part of their identity, particularly in collaborative relationships. This theme illustrates that problem-solving style, or the “way I plan,” is a cognitive effect within Kirton’s (2011) cognitive function schema, and thus, a core component of expressed identity (Anderson et al., 2018). Through introspection, evalpreneurs reflected on their KAI scores and characteristics of their adaptive or innovative problem-solving styles; through interpretation, they assigned meaning to these preferences in the context of their work. Findings reveal a complex but meaningful relationship between problem-solving style and identity. For some, style is central to their sense of self; for others, it is not.

Innovative evalpreneurs, such as Ella (KAI=116) and Faye (KAI=118), often described their style as integral to their identity. They associated innovation with creativity, flexibility, and challenging norms—traits they strongly identified with. Ella, for example, framed her innovative style as an extension of her values of inclusivity and collaboration. Similarly, Faye’s awareness of her style deepened after engaging in her KAI results, reinforcing A-I theory’s view that problem-solving preferences are linked to hidden identity (Kirton, 2011; Anderson, 2021). For these evalpreneurs, their problem-solving style was not just a functional tool, but an essential element of their personal and professional identity, influencing their approach to leadership and collaboration.

In contrast, adaptive evalpreneurs, such as Melody (KAI=84) and Clara (KAI=78), tended to view their style as a practical tool rather than a personal identity. Melody valued her adaptive approach for its efficiency and contribution to team structure, without trying it to her identity. Among the innovative evalpreneurs, like Lucia (KAI=127), she described her style as

instrumental, not defining her identity. However, some adaptive evalpreneurs, like Clara, saw their problem-solving preferences as reflective of deeper values such as reliability and consistency—suggesting a more integrated view of identity. These adaptive evalpreneurs recognized the functional benefits of their problem-solving style but acknowledged that it was also linked to their overall approach to work and life.

Despite these differences, both groups of evalpreneurs acknowledge the significant impact their problem-solving styles have on their professional identities and collaborative relationships. Innovative evalpreneurs often view their cognitive style as a core element of their identity, while adaptive evalpreneurs focus on the functional benefits of their style in achieving efficiency. Nonetheless, both groups recognize the importance of understanding and appreciating diverse problem-solving styles in collaborative settings. Evalpreneurs from both categories agree that recognizing these differences strengthens team dynamics, fosters more creative solutions, and improves overall performance. This shared understanding underscores the importance of cognitive diversity in collaborative work environments, which is integral to both individual success and team cohesion in evalpreneurship.

Implications for Practice. The findings from this research contribute to and agree with the previous research that, one's problem-solving style as adaptive or innovative is a hidden identity (Anderson, 2021) and an integral part of the expressed identity (Woods-Well, 2016; Anderson et al., 2018; Simpson et al., 2024). Although some evalpreneurs did not see their style as part of their identity, in line with the OSBP conceptual framework, through interpretation all interviewed evalpreneurs evaluated and assigned meaning of their KAI results and how their problem-solving styles benefit their work with teams (Anderson et al., 2018). The process of reflection through introspection (self-analysis) and interpretation) extended beyond data

collection for this study, it contributed to evalpreneurs' reflective practice. This implies that this process provides space to become a reflective practitioner, an important skill in evaluation and consulting.

The findings have several practical implications. First, evalpreneurs should engage in continuous self-reflection to better understand their problem-solving styles and how these styles shape their identity, team dynamics and observed behavior. Tools like the KAI can be invaluable in this process, helping evalpreneurs assess their cognitive preferences and align them with their professional roles. By fostering greater self-awareness, evalpreneurs can enhance their ability to work within diverse teams, improving collaboration and ensuring that their cognitive strengths are utilized effectively. Additionally, organizations and team leaders should create environments that encourage understanding and respect for different problem-solving styles. Training programs that focus on the value of cognitive diversity and equip team members to work collaboratively across different styles can promote better teamwork and more innovative outcomes.

This study examined a relatively homogeneous group of evalpreneurs, primarily white and female. However, even within groups that appear demographically similar, this study found that individuals can differ significantly in how they think and solve problems. Henceforth, recognizing problem-solving style as a key dimension of cognitive diversity is essential, with important implications for evaluator training, team composition, and the development of more effective and inclusive evaluation practice. Lastly, when working in teams, a safe space for choosing the best idea for a company to move forward, can be based on the merit of the idea instead of who came up with the idea

Recommendations. The findings support the idea that problem-solving style is both a cognitive preference and an aspect of their expressed identity. While experienced differently by adaptive and innovative individuals, this style shapes how evalpreneurs think, relate, and lead. This affirms Kirton's (2011) assertion that identity is grounded in the question, "How do I think, who am I?". Following Kirton's Adaption-Innovation (A-I) theory, the cognitive function schema, and the OSBP conceptual model, future research should advance the literature on expressed identity (Anderson et al., 2018; Simpson, 2019; Simpson et al., 2024) by further examining the relationship between problem-solving styles and expressed identity. Such an inquiry would offer a distinct and meaningful contribution to the field.

Theme 2.

Both adaptive and innovative evalpreneurs hold and express multiple intersecting identities that shape how they relate to their work and collaborators

Evalpreneurs in this study expressed a range of "I am" aspects of their identity—such as race, gender, spirituality, cultural background, family roles, and professional history—that influenced how they engage with their teams, clients, and collaborators. These identities align with Anderson et al.'s (2018) concept of expressed identity within the OSBP conceptual framework, which emphasizes that individuals selectively share aspects of themselves that they wish to be seen and acknowledged for. These expressed identities also map onto Kirton's Cognitive Function Schema, particularly the components of cognitive resource (knowledge, experiences) and cognitive affect (values, belief systems) (Kirton, 2011; Anderson, 2023).

Through introspection, participants examined how their identities shaped their leadership and collaboration approaches. Innovative evalpreneurs expressed their identities in ways that

challenged norms and aimed to drive meaningful change. For instance, Lucia (KAI=127) recognized how her privilege as a white, cisgender, able-bodied woman influenced how she was perceived and used that awareness to foster more inclusive, equitable client relationships. Similarly, Ella (KAI=116) linked her identity as a feminist and woman entrepreneur to a leadership philosophy centered on amplifying marginalized voices. These reflections illustrate the OSBP component of interpretation, as evalpreneurs actively make sense of their identities and assess how they are perceived within professional contexts.

Adaptive evalpreneurs also engaged deeply in introspection and interpretation but were more focused on fostering stability and cohesion in their work environments. Vivienne (KAI = 83) emphasized her connection to nature, spirituality, and social justice, noting that these values influence her desire to co-create with teams rather than lead from above. Mira (KAI = 82) shared how her identity as a former pastor shapes her approach: “I’m deeply interested in what others are saying, which fosters a collaborative environment where everyone feels heard.” These reflections reveal how expressed identities are grounded in deeply held beliefs and values in the cognitive affect (Anderson, 2023).

Implication for practice. The findings suggest that evalpreneurs, as market actors, significantly influence how evaluation is defined, commissioned, and used, shaping the field’s evolution (Sabarre, 2021). In addition to their problem-solving styles, whether adaptive or innovative, evalpreneurs hold and express multiple identities that impact their work. These identities shape their team collaboration preferences, leadership strategies, and responses to market disruptions and uncertainty.

To support evalpreneurs in navigating these complexities, evalpreneurs should create "identity workspaces" in their firms, to provide psychological and emotional support for reflection on these multiple identities (Petriglieri & Petriglieri, 2010). These identity workspaces will provide evalpreneurs with the opportunity to explore how their diverse identities shape their leadership and collaboration practices, leading to more effective and impactful work (Bennani et al., 2021). This further implies that by supporting identity-informed leadership and fostering psychological safety (Syed & McLean, 2016), evaluation businesses can strengthen team cohesion, improve client relationships, and enhance the overall quality and influence of evaluation practice.

Recommendations. Future research should delve deeper into the intersections of identity and problem-solving styles, particularly within evalpreneurship, to understand their impact on decision-making, leadership, and collaboration. Studies should focus on how adaptive and innovative problem-solving styles influence identity expression and how evalpreneurs navigate diverse identity dynamics in their teams and client relationships. Additionally, future research can build on the existing literature on expressed identity, such as the works of Anderson et al. (2018), Simpson (2019), and Simpson et al. (2024). This research would provide valuable insights into how expressed identity factors align with Kirton's cognitive function schema and the OSBP conceptual model, enhancing our understanding of how evalpreneurs engage with their identities in professional settings and how these identities shape their collaboration and leadership practices.

Theme 3.

Both adaptive and innovative evalpreneurs often integrate aspects of their expressed identities into their collaborative evaluation consulting work in an ongoing and sometimes challenging process, where some identities complement each other (high II) while others conflict (low II).

Through introspection and interpretation of the OSBP conceptual model (Anderson et al., 2018), participants reflected on their practical experiences, considering how multiple aspects of their identities were either easily integrated and complementary (high II) or in conflict and harder to integrate (low II) (Cheng et al., 2008). These reflections were particularly focused on how their identities influenced teamwork and collaborative relationships in evaluation consulting (Maack & Upton, 2006). Through introspection, participants from this study reflected on past experiences when expressed identities or social identities—such as race, gender, and family roles—clashed with professional roles as evalpreneur.

For example, Lucia's (KAI =124) struggle to integrate her white identity within the context of social justice work in communities of color highlights an experience of low II (Syed & McLean, 2016). Clara (KAI =78), similarly, expressed difficulty reconciling her feminist values with her white identity during work in marginalized communities, which is a typical experience of low II (Syed & McLean, 2016). On the other hand, high II occurs when evalpreneurs successfully integrate their multiple identities in ways that feel natural, easy, and authentic (Syed & McLean, 2016). Adaptive evalpreneur Clara (KAI = 78), for instance, thrives in a work culture that emphasizes authenticity, where she feels encouraged to bring her whole self into her consulting work. Similarly, an innovative evalpreneur Ella (KAI =116), her identity as a parent

directly enriches her work, allowing her to connect her role as a mother informed her evaluation consulting work to assess kindergarten projects. Ella's ability to draw on her experiences as a parent to inform her professional work showcases high II. Further, interview findings in Faye's (KAI = 127) ability to integrate her personal life with her professional role through entrepreneurial flexibility exemplify high II.

Implications for Practice. The experiences of identity integration shared by both adaptive and innovative evalpreneurs in this study underscore the importance of evaluation consulting firms intentionally creating environments that support identity development and coherence. Through the lens of the OSBP conceptual model (Anderson et al., 2018), participants reflected on how different facets of evalpreneurs' identities—such as gender, race, professional values, and caregiving roles—either aligned easily (high identity integration) or created internal tension (low identity integration) in their work (Cheng et al., 2008). These reflections reinforce the concept of *identity workspaces*, which are environments that offer psychological, emotional, and social support for identity exploration and integration (Petriglieri & Petriglieri, 2010). As noted by Bennani et al. (2021), such spaces are especially vital for Young and Emerging Evaluators (YEEs), but they are also critical across the lifespan for supporting meaningful professional growth. In alignment with Kroger (2015) and Petriglieri et al. (2018), this study suggests that firms that prioritize identity integration enable evaluators to craft narratives about who they are and how they lead, fostering greater engagement and authenticity in their evaluation and consulting practices.

This approach matters for the evaluation field and market because it enhances the quality and relevance of evaluation products and services. When evaluators are empowered to integrate their personal and professional identities, they are more likely to produce work that is thoughtful,

reflective, and aligned with their values. This not only increases the credibility and trustworthiness of their evaluations but also supports more meaningful client relationships. Additionally, a strong sense of identity allows evaluators to adapt to changing contexts and navigate uncertainties, resulting in evaluations that are more innovative and responsive to the evolving needs of clients. Ultimately, promoting identity integration helps elevate the overall value and impact of evaluation services, making them more effective and sustainable in a dynamic marketplace.

Moreover, facilitating identity integration within evalpreneurship has practical implications for leadership development, decision-making, and team cohesion. As Hammond et al. (2017) explain, identity integration refers to how well a leader's sense of self spans across personal, professional, and social roles, fostering consistency and ethical clarity in their leadership approach. As leaders of evaluation businesses, evalpreneurs' integration of their multiple identities helps them build trust with clients, collaborate effectively across diverse teams, and stay grounded in their core values even in high-pressure situations (Syed & McLean, 2016). In turn, this integration enhances psychological well-being by enabling individuals to maintain a stable sense of self amid shifting demands and environments (Syed & McLean, 2016). However, the process of identity integration may manifest differently for adaptive and innovative evalpreneurs due to their distinct problem-solving styles and coping mechanisms. For adaptive evalpreneurs, identities that align with their problem-solving and leadership style will be more easily integrated. This integration will be achievable when it creates a reliable, predictable environment, where their sense of self is aligned with well-established norms and ethical standards. For innovative evalpreneurs, on the other hand, identity integration will often be

prioritized in ways that allow them to reshape their sense of self, ensuring it stays aligned with new opportunities, shifting industry trends, and evolving client needs.

Recommendations. This study makes a significant, early contribution to understanding identity integration among leaders of evaluation businesses. Given the evolving body of research on leader identity and identity integration, the findings offer a valuable starting point while highlighting the need for continued empirical exploration in this area. Future research should build on these insights by incorporating larger, more diverse samples. Using quantitative methods—such as validated measures of identity integration (e.g., Cheng, Sanchez-Burks, & Lee, 2008)—will allow researchers to test hypotheses, identify patterns, and generalize findings to a broader population. A mixed-methods approach could also enhance research by combining the statistical strength of quantitative data with the rich insights provided by qualitative methods.

Furthermore, participants in this study frequently discussed identity integration within teams and collaborative relationships. Given that collaboration is key to leveraging social networks and social capital to address complex problems (Friedel & Hatala, 2010), future research should explore how identity integration influences team dynamics, creativity, and problem-solving. This would deepen our understanding of how identity integration shapes leadership and collaboration within the evaluation field.

Research question #3: How is coping behavior evidenced among the more adaptive and more innovative evalpreneurs comparatively?

Theme 4.

Evalpreneurs described evidence of behaving outside their preferred problem-solving style (coping behavior) as a response to environmental and team demands in the evaluation consulting context.

The findings offer insights into how evalpreneurs engage in coping behaviors as they navigate environments that often demand actions outside their preferred problem-solving styles (Friedel, 2014). While coping has been explored in the KAI literature, this study highlights how evalpreneurs uniquely experience and manage the emotional and cognitive strain of their work. Coping strategies among evalpreneurs go beyond merely responding to external demands; they reveal the invisible labor and cognitive diversity embedded in evaluation leadership. These behaviors, which are necessary for survival in a rapidly changing consulting landscape, shed light on how evalpreneurs influence the evolution of evaluation through their business choices, client education, and organizational design.

Regardless of their position on the adaptive–innovative continuum, evalpreneurs employ a range of coping strategies in response to challenges such as fluctuating client expectations, shifting team dynamics, and strict project constraints. Adaptive evalpreneurs like Clara, Serena, and Mira tend to rely on structured, deliberate coping mechanisms, focusing on preserving order, stability, and incremental change within established frameworks. In contrast, innovative evalpreneurs, like Lucia, Sage, and Zane, navigate highly structured environments with reluctance, often needing to suppress their creativity to conform to rigid processes or manage

task-heavy requirements. These coping behaviors, while emotionally and mentally taxing, are critical for maintaining professional success and personal well-being.

What makes coping particularly significant for evalpreneurs is the way it directly influences the evolution of the evaluation field. These leaders' coping strategies reflect the hidden emotional and cognitive labor they undertake to adapt to an ever-changing landscape. By employing strategies such as cognitive reframing, temporal compartmentalization, and aligning tasks with broader professional goals, evalpreneurs manage to stay effective and engaged despite the challenges. This diverse range of coping strategies does not fit neatly into the adaptive-innovative divide but reflects the flexibility needed to succeed in an environment of uncertainty. Understanding how evalpreneurs manage their coping processes is essential for understanding how they shape the market dynamics of evaluation, influence the supply and demand for evaluation services, and manage the tensions between creativity and structure. This study, therefore, not only expands our understanding of evalpreneurs' behaviors but also emphasizes how their coping strategies contribute to the adaptability and resilience of the evaluation practice.

Implications for Practice. Given the ongoing transformation of the evaluation field, adaptive and innovative evalpreneurs may respond differently to emerging market pressures. Adaptive evalpreneurs might cope by doubling down on process, documentation, and client management strategies, offering a sense of reliability in an increasingly fluid environment. Their preference for structure positions them well to maintain continuity in long-term relationships or projects that demand precision and compliance (Kirton, 2011). However, their coping may be tested in more emergent, less predictable spaces—requiring them to stretch into more flexible, creative roles. Innovators, on the other hand, are likely to thrive in decentralized or systems-oriented projects that reward rapid ideation and iterative learning (Friedel, 2014). Yet their

coping may be challenged by the increased administrative burden and operational complexity that comes with running independent consultancies or collective enterprises. As they navigate these demands, their coping will rely heavily on collaboration, reframing, and creating flexible structures that support their creativity without stifling it.

Recommendations. Overall, the findings highlight the importance of enhancing the conceptual understanding of coping within evalpreneurship. While participants provided valuable insights into their coping strategies—ranging from emotional self-regulation to time management techniques — the existing literature has yet to fully explore the complexities of coping behavior in the context of evaluation consulting. Future research should focus on examining how coping behavior influences key factors such as professional identity, motivation, and performance over time. Additionally, further exploration is needed to clarify related constructs, such as coping styles and the role of adaptive versus innovative approaches, to better inform both theory and practice in this field. Understanding these nuances will help evalpreneurs more effectively navigate the demands of their work and provide practical tools for managing the evolving challenges in the evaluation landscape.

Theme 5.

Emerging six sub-themes illustrate the nuanced ways coping behavior manifests in both adaptive and innovative evalpreneurs.

Consistent with prior research on coping behaviors (Samms & Friedel, 2013) and aligned with the OSBP conceptual framework (Anderson et al., 2018), this study reinforces that coping—defined as acting outside one’s preferred problem-solving style—is a routine and necessary behavior in the work of evalpreneurs (Kirton, 2011). Participants’ reflections revealed

that coping is not simply a reaction to isolated stressors, but an embedded feature of their day-to-day consulting practice, shaped by the demands of client work, team dynamics, and organizational pressures. Interestingly, a consistent pattern emerged in sub-theme one, regardless of whether they identified as adaptive or innovative; evalpreneurs leaned toward more adaptive coping strategies when under pressure. Even highly innovative evalpreneurs like Tara (KAI=147) and Lucia (KAI=124) described intentionally slowing down or adding structure to their workflows in moments of high stress, suggesting that evaluation work itself may reinforce a preference for adaptive behaviors. Similarly, adaptive evalpreneurs like Mira (KAI=82) and Serena (KAI=79) emphasized structure, routine, and methodical clarity as central to how they coped with complex or unfamiliar challenges.

Under sub-theme two, coping behaviors were not solely dictated by cognitive style but emerged through a blend of preparedness and spontaneity, shaped by personality, context, and professional experience. Some evalpreneurs preferred proactive planning—preparing systems or mental strategies in advance—while others relied on spontaneous adjustments based on the situation. Regardless of style, many gravitated toward adaptive coping techniques, favoring structured processes and collaborative relationships to navigate uncertainty. Although coping behavior suggests behaving outside one's preferred style (Kirton, 2011), findings under sub-theme three revealed that coping strategies were rooted in and reflected one's style. Innovative evalpreneurs like Zane (KAI=116) and Tara (KAI=147) added systems or reframed structured tasks to retain a sense of autonomy, while adaptive evalpreneurs such as Clara (KAI=78) and Serena (KAI=79) emphasized planning and procedural consistency to manage stress. These findings align with Kirton's (2011) assertion that coping behavior reflects one's style, even when

acting outside it, and that coping strategies are often rooted in one's preferred styles (Samms & Friedel, 2013)

Regarding the emotional response to coping under sub-theme four, evalpreneurs described coping as complex and layered—often involving stress, frustration, empowerment, and growth. While stepping outside one's preferred style created discomfort or tension, many noted that these experiences also led to greater self-awareness and professional resilience. Innovative participants like Lucia (KAI=124) and Zane (KAI=116) found coping liberating, even as others like Tara (KAI=147) and Skylar (KAI=117) acknowledged the physical and emotional toll. Adaptive evalpreneurs, including Clara (KAI=78) and Vivienne (KAI=83), described transitions from stress to confidence as they made progress or regained control. Both adaptive and innovative evalpreneurs highlighted the emotional labor embedded in their roles, particularly in contexts where their coping efforts went unnoticed by clients or peers. Some participants viewed coping as an internal or invisible process, often misinterpreted or undervalued by others, which speaks to the hidden cognitive and emotional work in evaluation consulting.

Under sub-theme five, findings reveal that coping was not only a response to situational demands but also an ongoing learning process, a catalyst for personal and professional growth. Both adaptive and innovative evalpreneurs reflected on how coping shaped their leadership, communication, and collaboration skills over time. Many expressed that earlier awareness of their own and others' problem-solving styles could have improved emotional resilience, team alignment, and stress management. Adaptive participants emphasized how clear boundaries and structured expectations reduced strain, while innovative ones acknowledged the value of introspective reflection on this. Collectively, these insights underscore that through coping,

evalpreneurs not only manage their roles more effectively but also evolve into more reflective, agile, and resilient leaders within the evaluation field.

Under sub-theme six, both adaptive and innovative evalpreneurs reported that their different types of coping strategies were recognized or often misinterpreted by others. Innovative evalpreneurs described coping as an internalized process, visible only to those who worked closely with them. Others acknowledged their coping more openly, while some noted that even when visible, it wasn't always recognized as such. Adaptive evalpreneurs often had their coping mistaken for routine professionalism, with some intentionally hiding signs of struggle to maintain a composed leadership presence. While some close contacts occasionally noticed subtle cues, the emotional labor involved was often underestimated. These observations highlight how coping, especially when aligned with one's cognitive style, remains hidden, obscuring the emotional and cognitive demands of maintaining stability and effectiveness in evaluation consulting.

Implications for Practice. The findings have several important implications for the practice, specifically for independent evaluation consultants, evalpreneurs, and teams in for-profit and non-profit evaluation-focused organizations as well as the evaluation marketplace at large. These implications can be understood in the context of six key areas.

1) Supporting Coping Through Reflection and Development. Individuals, teams, and organizations should create structured opportunities for introspection and self-reflection to help them better understand and manage their coping behavior. By making reflective practice a culture and providing development tools (such as KAI training workshops, leadership coaching, KAI mentorship, or professional learning communities), they can develop emotional agility and

recognize how their coping strategies align with their cognitive strengths, which are crucial for navigating stress and uncertainty in personal and professional aspects of their work.

2) *Encouraging a Balanced Approach to Problem-Solving.* Given that coping behaviors are influenced by both preparedness and spontaneity, individuals, teams, and organizations should be encouraged to balance their approach to problem-solving with proactive planning skills and the ability to adapt spontaneously in high-pressure situations. Training and development initiatives should focus on helping them enhance their capacity to manage unpredictable situations while ensuring that their responses remain in line with their cognitive strengths.

3) *Addressing the Emotional Complexity of Coping.* Coping behavior is often emotionally taxing (Samms & Fridel, 2013), with evalpreneurs experiencing stress, frustration, and emotional strain, which can go unnoticed by colleagues or clients. To address this, evalpreneurs, their teams, people, and organizations collaborating with them should create supportive environments where the emotional labor involved in evaluation work is acknowledged. This can be achieved through regular debriefs, peer support groups, or creating spaces for open dialogue about the emotional challenges involved in evaluation work. Moreover, evalpreneurs should be mindful of how privilege and cultural context can shape emotional experiences. For instance, BIPOC or those from non-Western contexts may face additional emotional stressors, such as navigating cultural biases or being expected to conform to Western-centered evaluation practices. Creating a culturally responsive support system will help them feel valued and understood, enhancing their emotional resilience and overall well-being.

4) *Leveraging Coping as a Tool for Professional Growth.* As findings suggest, coping should be viewed not just as a reaction to stress but also as a developmental tool for professional growth.

Both adaptive and innovative people may reframe their coping experiences as opportunities for learning, self-improvement, and leadership development. Through regular self-reflection and feedback and embedding reflective practices into performance evaluations and professional development programs, individuals, teams, and organizations can transform coping into a strategic learning process and advance in their careers.

5) *Acknowledging the Invisible Labor of Coping.* Findings revealed that much of the emotional and cognitive labor involved in coping often goes unnoticed, especially when coping aligns with a person's preferred work style. To address this, leaders of organizations should recognize the "invisible labor" of people by actively acknowledging their efforts, whether they are visible or not. Implementing regular check-ins or providing formal recognition for the mental and emotional efforts expended during challenging situations can help mitigate the strain that comes from feeling undervalued. Most importantly, leaders should be sensitive to how privilege and cultural context affect the visibility and recognition of coping efforts. For example, Black, Indigenous, and People of Color (BIPOC) or non-Western backgrounds may find that their coping strategies are misunderstood or undervalued due to cultural biases. By creating a more inclusive and supportive environment, organizations can ensure that the full spectrum of coping efforts is recognized and appreciated.

6) *Enhancing Team Composition and Collaboration.* Leaders should consider cognitive diversity when forming evaluation teams (Uwitonze & Friedel, 2025). Using the KAI to identify individuals' problem-solving styles can facilitate the strategic formation of teams with a diverse mix of adaptive and innovative approaches, thereby enhancing their ability to effectively solve Problem A and Problem B (Friedel, 2014). This diversity not only enhances problem-solving capacity but also helps alleviate coping tensions by allowing team members to operate within or

near their cognitive strengths. In this study, Evalpreneur partnerships exemplified the benefits of such cognitive complementarity. For instance, Clara (KAI = 78), a more adaptive thinker, and her highly innovative business partner (KAI = 125), reported a successful working dynamic where each could focus on tasks that suited their strengths. Similarly, Brooke (KAI = 125) and her partner Clarisa (KAI = 80) described their cognitive differences as a strategic advantage rather than a barrier. In these partnerships, the more adaptive partners naturally took on roles involving financial oversight, project management, and team coordination—areas that benefit from structure, order, and diligence. Meanwhile, the more innovative partners focused on strategic planning, marketing, and identifying new opportunities that require ideation, risk-taking, and comfort with ambiguity. This division of labor not only improved overall business performance but also reduced the need for each partner to stretch far outside their preferred cognitive style, thereby easing the emotional and cognitive burden associated with coping. These examples highlight how the intentional pairing of contrasting cognitive styles can foster resilience, productivity, and profitability in evaluation consulting.

Recommendations for Future Research. Although previous research has examined the link between problem-solving style and coping behavior—particularly in academic contexts (e.g., Samms & Friedel, 2013)—there remains considerable conceptual ambiguity around key constructs such as *coping technique*, *coping style*, *coping direction*, *coping reaction*, and *coping response*. Most notably, existing studies tend to treat coping as a static behavior rather than a dynamic, context-sensitive process influenced by cognitive orientation, emotional labor, and external perception. This study contributed to bridging that gap by highlighting how evalpreneurs, operating in decentralized and high-stakes professional environments, engage in cognitively congruent but emotionally complex coping behaviors.

The concept of *coping direction*—whether an individual temporarily shifts adaptively or innovatively to meet task demands—deserves deeper theoretical and empirical exploration. Future research should aim to clarify and differentiate among coping-related constructs, offering more robust conceptual frameworks that can be applied across sectors. Furthermore, while this study centered on evalpreneurs, future research should investigate how professionals in other entrepreneurial or consulting fields manage similar tensions between their preferred cognitive styles and external demands. This could include comparative studies across industries (e.g., education, healthcare, social innovation), sectors (public, private, nonprofit), or roles (independent vs. organizationally embedded professionals).

Longitudinal or mixed-methods research could also capture how coping behaviors evolve and how they affect long-term outcomes such as burnout, leadership development, team cohesion, and business success. Critically, future research must also examine how *privilege, cultural context, and economic positioning* shape coping behavior. BIPOC evalpreneurs or those working in non-Western contexts may experience unique stressors—such as cultural dissonance, resource constraints, or systemic bias—that influence both the form and visibility of their coping responses. These factors affect not only how individuals cope but also how their coping is interpreted (or misinterpreted) by clients, peers, and the broader market. Comparative studies that investigate these dynamics would provide valuable insights into equity and inclusion within the evaluation profession and beyond.

Finally, there is rich potential for applied research into how tools like the Kirton Adaption-Innovation Inventory (KAI) can be practically integrated into evaluator training, hiring, and team development to foster psychological safety, reduce coping strain, and enhance team effectiveness. Understanding how problem-solving style awareness can be used to

intentionally design more cognitively diverse and inclusive work environments, particularly for under-resourced or solo practitioners, could significantly advance the field's responsiveness to current workforce and market shifts. In summary, future research should not only aim to refine theoretical understandings of coping behavior with cognitive style but also critically interrogate how systemic and contextual factors shape these processes. Doing so can contribute to more equitable, resilient, and adaptive professional practices in evaluation and other cognitively demanding fields.

Summary

This chapter revisits the problem statement, the study's significance, and its *priori* assumptions. It details the research methodology, questions, and objectives, and examines the conceptual framework guiding the study. The chapter concludes with a discussion of the findings, their implications, and recommendations for future research based on each theme and research question.

Final Conclusions

This study provides a foundation for understanding the merging field of evalpreneurship through the cognitive lens using Kirton's (2011) A-I theory as a theoretical framework. Conceptually, the study was guided by the Organismic Social Behavioral Perspective (OSBP) model by Anderson et al. (2018) which is founded on Bandura's social cognitive theory and integrates Kirton's cognitive Function Schema. Through a cognitive lens, this study examined the adaptive or innovative problem-solving styles of evalpreneurs and how these styles shape behavior and are perceived as aspects of identity, which—together with their multiple expressed

identities—are either well-integrated (high identity integration) or in conflict (low identity integration) within a rapidly evolving evaluation landscape.

In summary, this study found evalpreneurs are adaptive and innovative in their problem-solving preference, and their introspective reflection of their style were closely tied to their personality as revealed by KAI factor traits. For some evalpreneurs, style was an aspect of their identity influencing how they engage with clients, colleagues, and communities. These styles were stable, as evalpreneurs often used coping behavior to meet the evolving demands of their environments. Second, the study revealed that evalpreneurs carry multiple intersecting identities—such as race, gender, spirituality, and family roles—that shape their leadership, collaboration, and communication. Some evalpreneurs seamlessly integrated these identities, while others experienced conflicts when personal identities clashed with organizational or societal expectations. Third, the ease of identity integration varied depending on context and team dynamics, with evalpreneurs reporting greater comfort in inclusive, values-aligned, and collaborative spaces. Finally, both adaptive and innovative evalpreneurs described instances where they had to employ coping behavior, stepping outside their natural problem-solving styles to navigate team dynamics, client needs, and entrepreneurial challenges. While these coping strategies were often necessary, they were also emotionally and cognitively taxing when sustained over time, highlighting the challenges of balancing personal and professional demands (Friedel, 2014).

This study findings contributes to the body of knowledge on core concepts central to this dissertation—problem-solving styles, coping behavior, expressed identity, and identity integration. Beyond these focal areas, it also extends knowledge in several emerging domains, including the understudied leaders of evaluation businesses or evaluation entrepreneurs or

evalpreneurs (Sabarre, 2021), leader identity development (Hammond et al., 2017), and phenomenography as a methodological approach in evaluation research (Jobin & Turale, 2019). While recommendations have been provided for the core concepts, further investigation is needed across these broader domains. Specifically, future research in these areas may focus on

1. Future research on KAI and problem-solving styles should focus on the impact of cognitive diversity in teams, particularly the balance between adaptive and innovative styles, on collaboration, decision-making, and team effectiveness in evaluation businesses. Investigating how diverse cognitive styles influence team dynamics, emotional labor distribution, and long-term consulting success could optimize team design and enhance organizational performance. Additionally, studies should explore how cultural background, privilege, and systemic barriers shape the use of KAI and problem-solving approaches, particularly among BIPOC evalpreneurs or those working in non-Western, collectivist, or resource-limited contexts. This line of inquiry could uncover unique challenges and strategies, leading to more inclusive evaluation practices that account for diverse leadership styles and socio-cultural factors. Finally, it is important to recognize that even within seemingly homogeneous groups, individuals may approach problems in fundamentally different ways. Future research and practice should consider problem-solving style as a vital dimension of cognitive diversity—one that has meaningful implications for evaluator training, team composition, and the overall effectiveness of evaluation practice.

2. As highlighted in the literature reviewed for this study, there is a clear need for further research to understand evalpreneurs as problem-solving leaders. Frameworks such as Jablolkow et al.'s (2010) problem-solving leadership model, grounded in Kirton's Adaption-Innovation theory, offer a promising foundation for such inquiry. Given that evalpreneurs operate within a wide range of organizational structures—including large firms, boutique consultancies, worker-

owned cooperatives, and intrapreneurial roles within larger institutions (Barrington, 2011)—future research should investigate how these structural contexts shape leadership approaches, strategic decision-making, coping behaviors, and the integration of multiple expressed identities. In particular, studies should explore how adaptive versus innovative cognitive styles influence leadership effectiveness and problem-solving across these diverse business models. Additionally, there is a critical need to examine how socio-cultural, racial, and economic factors intersect with leadership practices, especially among BIPOC evalpreneurs and those working in non-Western or resource-limited environments. Research should also address how systemic barriers affect identity development, perceived legitimacy, and access to entrepreneurial opportunities in the evaluation field. Further investigation into the role of mentorship, peer networks, and community-based leadership models—such as worker-owned or cooperative enterprises—could reveal valuable strategies for fostering resilience, identity coherence, and long-term success

3. This study employed Hammond et al.'s (2017) multi-domain identity-based leadership model to develop its interview protocol, providing a structured approach to explore how evalpreneurs define and express their leadership identities across personal, professional, and social domains. As the evaluation field undergoes significant shifts—driven by declining public-sector funding, evolving philanthropic demand and market disruptions, the nature of leadership, particularly among evalpreneurs, is also transforming. While Hammond et al.'s (2017) multi-domain model offered valuable insights, future research should use other models to examine how leader identity develops and change over time, shaped by key entrepreneurial experiences such as business formation, client relationships, role transitions, and encounters with systemic barriers. Longitudinal or narrative inquiry approaches would be well-suited to capturing these evolving identity processes. Additionally, future studies should broaden the scope beyond work-

centered conceptions of leadership to include how cultural background, community ties, and life experiences influence how evalpreneurs understand and enact leadership.

4. This study began with the assumption that meaningful differences exist between adaptive and innovative evalpreneurs, thereby justifying the use of a phenomenographic approach to explore these variations in experience (Rolls, 2023). It is on this context that the thematic analysis of interview data was conducted using the Marton method, which emphasizes identifying and categorizing qualitatively different ways individuals experience a phenomenon (e.g., coping behavior, identity integration) (Jobin & Turale, 2019). While this approach effectively revealed key variations, future research could benefit from adopting the Åkerlind method, which focuses on the depth and development of understanding over time (Jobin & Turale, 2019). Comparative studies using both methods could yield valuable insights into how categorization versus developmental progression shapes interpretations of experience. Additionally, longitudinal phenomenographic research could explore how continued leadership practice influences evalpreneurs' coping behavior, resilience, and identity integration over time. Such work would expand the methodological richness of phenomenography methods while deepening understanding of evaluation leadership.

Broader Organizational and Marketplace Implications of the Study. In the context of a rapidly changing evaluation landscape—marked by shifts in funding sources, client expectations, and workforce dynamics, the ability to cope with these challenges is paramount. Organizations should use insights from this study to better understand how evalpreneurs respond to changes in the market and their roles. Adaptive evalpreneurs may thrive in more structured, predictable environments, while innovative evalpreneurs may excel in fast-paced, emergent

situations. Organizations can build resilience by cultivating teams that balance these styles, ensuring they can navigate both routine and unpredictable tasks effectively.

In addition, organizations should recognize the role of coping in the evaluation sector's adaptation to change. As the workforce decentralizes, with more professionals moving into independent consulting, it is crucial to provide support structures that enable evalpreneurs to manage the emotional and cognitive demands of this transition. This may include offering collaborative spaces, peer networks, or specialized training to help evalpreneurs navigate the shift to hybrid or independent roles. By integrating these practices into organizational structures, evaluation-focused organizations can foster a more resilient, agile, and emotionally intelligent workforce, ensuring that evalpreneurs are better equipped to manage current and future challenges in the evaluation field. This will lead to improved outcomes in evaluation work, both for clients and the broader evaluation community.

Practical Training Implications of the Study. This study highlights the critical need to incorporate cognitive diversity, coping strategies and identity integration into evaluator training and professional development. Although the group of evalpreneurs examined was relatively homogeneous in terms of race and gender—primarily white and female—their varied problem-solving styles demonstrate that cognitive differences exist even within demographically similar groups. As such, professional training should include components that build emotional intelligence, coping strategies, and self-awareness to help evalpreneurs navigate stress while remaining aligned with their core cognitive preferences. Tools like the KAI can be used to assess these preferences and strategically compose teams with complementary styles, fostering collaboration and enhancing problem-solving capacity. Furthermore, hiring and collaboration practices within evaluation organizations should actively recognize and value cognitive diversity

and cultural competence, promoting more inclusive and effective evaluation environments. For solo practitioners or under-resourced evalpreneurs, establishing mentorship programs and professional peer networks can offer vital support, reduce isolation, and encourage shared strategies for resilience. These insights offer actionable guidance for strengthening evaluator development and cultivating a more adaptive, inclusive, and sustainable evaluation profession.

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Appendix A: IRB Approval Letter



Division of Scholarly Integrity and
Research Compliance
Institutional Review Board
North End Center, Suite 4120 (MC 0497)
300 Turner Street NW
Blacksburg, Virginia 24061
540/231-3732
irb@vt.edu
<http://www.research.vt.edu/sirc/hrpp>

MEMORANDUM

DATE: January 16, 2025
TO: Curtis R Friedel, Nicolas Uwitonze
FROM: Virginia Tech Institutional Review Board (FWA00000572)
PROTOCOL TITLE: Exploring Problem-Solving Preferences, Identity Integration, and Coping Behaviors of Evalpreneurs in the United States: A Phenomenography Study
IRB NUMBER: 24-649

Effective January 16, 2025, the Virginia Tech Human Research Protection Program (HRPP) determined that this protocol meets the criteria for exemption from IRB review under 45 CFR 46.104 (d) category(ies) 2(ii).

Ongoing IRB review and approval by this organization is not required. This determination applies only to the activities described in the IRB submission and does not apply should any changes be made. If changes are made and there are questions about whether these activities impact the exempt determination, please submit an amendment to the HRPP for a determination.

This exempt determination does not apply to any collaborating institution(s). The Virginia Tech HRPP and IRB cannot provide an exemption that overrides the jurisdiction of a local IRB or other institutional mechanism for determining exemptions.

All investigators (listed above) are required to comply with the researcher requirements outlined at:

<https://secure.research.vt.edu/external/irb/responsibilities.htm>

(Please review responsibilities before beginning your research.)

PROTOCOL INFORMATION:

Determined As: **Exempt, under 45 CFR 46.104(d) category(ies) 2(ii)**
 Protocol Determination Date: **July 26, 2024**

ASSOCIATED FUNDING:

The table on the following page indicates whether grant proposals are related to this protocol.

Invent the Future

Appendix B: Study Participants consent form

Title of Study: Exploring Problem-Solving Preferences, Identity Integration, and Coping behavior of Evalpreneurs in the United States: A Phenomenography Study

Principal Researcher: Nicolas Uwitonze (nicolasu@vt.edu) / +1 (943) 214-1445

Principal Advisor: Dr Curt Friedel (cfriedel@vt.edu / (540) 231-8177)

What are some general things you should know about research studies?

You are being asked to take part in a research project. Your participation in this project is voluntary. You have the right to be a part of this study, to choose not to participate, or to stop participating at any time without penalty. The purpose of research projects are to gain a better understanding of a certain topic or issue. In this consent form, you will find specific details about the research in which you are being asked to participate. If you do not understand something in this form, it is your right to ask the investigators for clarification or more information. If at any time you have questions about your participation, do not hesitate to contact the investigator named above.

What is the purpose of this research?

The primary objective of this phenomenographic study is to explore how the adaptive and innovative group of evalpreneurs experience evalpreneurship, uncovering the similarities and differences in their problem-solving preferences, and coping behavior, as well as how various identities unfold as they interact with others via teamwork and group dynamics in evalpreneurship. The results will be used to enhance the existing body of knowledge, present at conferences, and publish in journals for educational purposes.

What will happen if you take part in the study?

Participants will complete a 20-minute online survey on demographic and identity-related data and take an online KAI inventory, a 10-minute measure of problem-solving styles. Participants completing the survey and KAI will be eligible for a 60-minute phenomenographic interview via Microsoft Teams or Zoom platform, exploring the collaborative identity and coping behavior of the adaptive versus the innovative evalpreneurs.

Risks

There are no known risks to participating in this study. Participation is voluntary, and you may choose to leave the study and terminate your participation at any time.

Benefits

The research data and findings will be used to improve and increase the knowledge base of evalpreneurship, problem-solving theory, and identity integration. No promise or guarantee of benefits has been made to encourage you to participate.

Confidentiality

The information from the interviews will be kept confidential to the full extent allowed by law. Data will be stored securely and measures will be taken to protect the security of data. No personal references will be made in oral or written reports, which could link you to the project. A pseudonym will be assigned in place of your name and that pseudonym will be used on any research materials so no one can match your identity to the answers that you provide. The Virginia Tech (VT) Institutional Review Board (IRB) may view the study's data for auditing purposes. The IRB is responsible for the oversight of the protection of human subjects involved in research.

Compensation

You will not be compensated for your participation in this study.

Consent to participate

I have read the Consent Form and conditions of this research study. I have had all of my questions answered. I hereby acknowledge the above and give my voluntary consent:

Participant's signature _____ Date: _____

Investigator's signature _____ Date: _____

What if you no longer wish to participate?

It is important for you to know that you are free to withdraw from this study at any time without penalty. You are free to not answer any questions that you choose or respond to what is being asked of you without penalty. Please note that there may be circumstances under which the investigator may determine that a participant should not continue.

What if you have questions about this study?

Should you have any questions about this study, you may contact one of the research investigators whose contact information is included at the beginning of this document. Should you have any questions or concerns about the study's conduct or your rights as a research subject, or need to report a research-related injury or event, you may contact the VT IRB Chair, Andrea Lynn Nash, at anash@vt.edu.

Appendix C: Online Survey on Demographics, Identity Factors of Evalpreneurs

Are you an evalpreneur or do you operate a formal evaluation business registered under the structure of a profit or nonprofit organization, located in the United States of America (US)?

If so, I am interested in hearing from you! My name is Nicolas, and I am a doctoral candidate at Virginia Tech. My dissertation research focuses on evalpreneurship, and I explore this topic through the cognitive lens using Kirton's Adaption-Innovation (A-I) Theory. My research targets evalpreneurs who operate (on a full-time basis) a formal evaluation business registered under the structure of a profit or nonprofit organization, located in the United States of America (US).

I am looking for study participants who: (1) self-identify as an evaluation business owner or co-owner; (2) operate a formal business registered in the US; (3) have a team, or often work in collaborative relationships involving teamwork/group dynamics in their evaluation practice; (4) Are willing to share their experiences about their preferences for problem-solving, behaviors, and teamwork/group dynamics experiences; (5) Are willing to share their experiences in evalpreneurship in one-on-one confidential interview; (6) Agree to complete the KAI

This survey is used to capture demographic characteristics, expressed and social identity factors, and collaborative identity-related information of evalpreneurs. Your participation is voluntary and will be kept strictly confidential. It would involve:

- Online preferred problem-solving style (KAI) inventory to assess problem-solving styles of evalpreneurs (adaptive vs. innovative characteristics) (10 minutes), which will be followed by an optional online KAI feedback workshop (60 minutes)
- An Online survey to capture demographic, expressed and social identity factors and collaborative relationship of evalpreneurs (20 minutes)
- Semi-structured interviews to explore the coping behavior, and how the more adaptive and innovative evalpreneurs integrate their identities in teamwork and group dynamics. This session will be recorded using Microsoft Teams' or Zoom platform.

Completion of the survey will take approximately 20 min and make you eligible for the remaining steps of the study. Beyond completing the survey, you may or may not be contacted to continue participating in the study. Your participation in all steps is voluntary and will be kept strictly confidential. If you are not selected to continue beyond this first phase, your information will be deleted and not considered in the study.

Interested? Please complete the demographic survey at the following link: (insert Qualtrics link to the survey Questionnaire)

Risks and Benefits

There are no known risks to participating in this study. Participation in this study is voluntary and you may choose to leave the study and terminate your participation at any time. Please note that although your participation is immensely appreciated in further the body of knowledge in this area, you will not be compensated for your participation in this study.

Confidentiality

Your name will be kept confidential with the use of a pseudonym. Accordingly, any research data shared publicly and/or published will be done using a pseudonym. It is possible that the Institutional Review Board (IRB) at Virginia Tech will view this study auditing purposes. The IRB is responsible for overseeing the protection of human subjects who are involved in research.

What if you have questions about this study?

Should you have any questions about this study, you may contact the primary researcher Nicolas Uwitonze (nicolasu@vt.edu) / (943) 214 1445, or the research advisors Dr. Curt Friedel at cfriedel@vt.edu

This survey has the following modules

Screener Module

1. In your professional working experience, have you ever worked in an evaluation related consultancy or in a team or in a business providing evaluation services or products.
 - a. Yes
 - b. No

Evaluation services include for instance, the designing and/or implementation of program and policy evaluations, evaluation capacity building. Evaluation products include deliverables such as evaluation reports, training materials and data sets.

2. In the past two years, have you been the primary owner, CEO, or partner of a firm offering evaluation products and services?
 - a. Yes
 - b. No
3. In your experience as the owner or partner of an evaluation firm, was your firm formally registered as an entity separate from yourself (e.g., LLC, S-Corp, C-Corp, 501c3)?
 - a. Yes, my evaluation firm is registered as a formal business entity
 - b. No, I am an independent consultant that primarily practices through my affiliation at the University, or any other organization

[TERMINATE if B. Display message: “Thank you for your interest in participating. This survey is focused on owners or partners of evaluation firms operating as separate entities. Please contact Nicolas at nicolasu@vt.edu if you think this is in error.]

Module 1: Demographic characteristics

4. Regardless of how long ago you started your business, how many years have you worked in the field of evaluation?
 - a. 0-5 years
 - b. 6-10 years
 - c. 11-15 years
 - d. 16-20 years
 - e. 21+ years

5. In what year did you formally start your evaluation business? (Drop down menu of years)
6. What gender do you most identify with?
 - a. Male
 - b. Female
 - c. Prefer to self-describe: _____
 - d. Prefer not to say
7. In what year were you born? (Drop-down menu)
8. What is your race/ethnicity? Select all that apply.
 - a. White
 - b. Black or African American
 - c. Hispanic or Spanish
 - d. Asian or Pacific Islander
 - e. American Indian/First Nations, Alaskan Native, or Intuit
 - f. Prefer to self-describe: _____
 - g. Prefer not to say
9. What is the highest degree you have completed?
 - a. High school
 - b. Bachelor's degree
 - c. Master's degree (MS, MA, MSW, MBA, MPH, MPA, etc)
 - d. Professional degree (MD, JD, etc)
 - e. Doctorate (PhD, EdD, etc)
10. In what field was your highest degree?
 - a. Program evaluation
 - b. Social science field (e.g., Psychology, Sociology, Economics, Political Science, Anthropology)
 - c. Humanities field (e.g., History, Philosophy, Literature)
 - d. Mathematics or statistics
 - e. Education
 - f. Public Administration
 - g. Public Health
 - h. Another professional field (e.g., Business, Law, Medicine, etc.)
 - i. Other (specify)
11. In what state is your primary office located? (drop down of states)

Module 2: Collaborative relationships in evalpreneurship (Adapted from Maack and Upton's (2006) survey of collaborative relationships in evaluation consulting)

Collaboration is essential business management strategy for experienced evalpreneurs and provides the emerging evalpreneurs an opportunity to obtain initial contracts and learning from the more experienced evalpreneurs (Maack & Upton, 2006; Sabarre, 2021). The survey module include questions about your stories, experience with collaboration, partnership with others, and other collaborative relationships.

12. Do you have a team, or often work in collaborative relationships involving teamwork/group dynamics in your evaluation practice?

- a) Yes
- b) No

13. How many full time staff does your evaluation business employ?

- None,
- 1-2,
- 3-4,
- 5 or more)

14. Have you ever sub-contracted or partnership with another consultant or business

- Yes
- No

15. How many collaborations have you had in the past year

- None,
- 1-2,
- 3-4,
- 5 or more,
- No response

16. Have you ever subcontracted or partnered with a specific consultant or business to increase diversity?

- No,
- Yes,
- no response

17. Think you or your company has ever been asked to join a project as part of increasing diversity of an evaluation team?

- No,
- Yes,
- No response

Modules 3: Factors influencing the way evalpreneurs express their identity

18. Using the four-point scale below, please indicate the extent to which the following factors influence the way you express your identity work as an evalpreneur and interactions in evalpreneurship? (Select all that apply and rate each factor on a scale from 1 = Not at all to 5 = Very Significant)

| | Not relevant at all | Not very relevant | Somewhat relevant | Very relevant | NA |
|-----------------------------------------------|----------------------------|--------------------------|--------------------------|----------------------|-----------|
| Educational background | 1 | 2 | 3 | 4 | 5 |
| Previous professional or personal experiences | 1 | 2 | 3 | 4 | 5 |
| Skills and abilities | 1 | 2 | 3 | 4 | 5 |

| | | | | | |
|--------------------------------------|---|---|---|---|---|
| Authority or influence in your field | 1 | 2 | 3 | 4 | 5 |
| Gender identity | 1 | 2 | 3 | 4 | 5 |
| Social class background growing up | 1 | 2 | 3 | 4 | 5 |
| Religious or spiritual identity | 1 | 2 | 3 | 4 | 5 |
| Ethnicity or racial identity | 1 | 2 | 3 | 4 | 5 |

19. What other factors (not listed above) do you feel have significantly influenced your expressed identity as an evaluator? _____

20. Consider your identity in terms of personal, relational, and collective (social or group) dimensions. Complete the sentence 'I am...' as many times as you can

Personal identity draws from individual traits, relational identity is shaped by interpersonal roles, and collective identity stems from group memberships (Brewer & Gardner, 1996)

For example, I am an evaluator

I am _____

I am _____

I am _____

I am _____

I am _____

I am _____

I am _____

I am _____

I am _____

I am _____

I am _____

Appendix E: Semi-Structured Interview Protocol

“Hello, my name is Nicolas Uwitonze, and I am a Ph.D. candidate at Virginia Tech. I would like to start by thanking you for your participation in this research study. Today, I am meeting with you all to ask a few questions about your coping behavior and how you integrate multiple identities in your work as an evalpreneur, especially in teamwork and group dynamics. I will be using the content of this discussion in my dissertation and academic publications. This interview will be audio recorded to allow me to reflect on this conversation, there is no identifiable information that will be used in the study. There is no physical risk associated with participation in this interview, however, some of the topics discussed may be somewhat uncomfortable.

Please note that you may discontinue participation at any time without penalty. Before we begin, I will go over the process of informed consent and ask you to sign a form indicating your consent to participate in this interview.

Introductory question to provide set for the participant

- 1) Tell me about who you are, your present roles, and your story in becoming an evalpreneur
- (2) Would you mind telling me about your preferred problem-solving style?

RQ 3 - How do the more adaptive and innovative evalpreneurs integrate their multiple identities

- (3) How do you see your style useful when working with your team? Do you see it as part of your identity?
- (4) What areas of life (e.g., business, personal values, family, community) are most central to your sense of self and inform how you approach your work as an evalpreneur?
- 5) How do these areas of life influence your collaborative interactions with colleagues, clients, and other stakeholders?
- 6) Do you find it easier or harder to integrate personal, and professional identities when working in teams? Why or why not?
- (7) Can you share your practical experience about how you integrated two or more of those identities?

RQ 2- How are coping behavior evidenced among the more adaptive and more innovative evalpreneurs comparatively?

- (8) In what ways do you feel culture impacts your ability to collaborate in teams?
- (9) If you could describe a situation when you felt the need to cope more adaptively or more innovatively than your preferred style?
 - a) How did you know that you needed to use coping behavior? Tell me more.
 - b) Which direction did you cope more, either adaptively or innovatively?
 - c) Were you prepared to cope, or was it more spontaneous?
 - d) What were some of the things you thought about as you were using coping behavior?
 - e) How did it feel while you were using coping behavior?
 - f) Looking back on your experience, what would you change if you had to do it all over again?
- (10) Do you think anyone noticed that you were using coping behavior? Why or why not?