

How program evaluation can help complex systems learn



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My example

- Contracted to help several United Ways with an interconnected series of projects designed to
 - Develop shared community-wide priorities to guide investment
 - Encourage funded programs to do more evaluation against these priorities
 - Facilitate sharing of evaluation information so that it can be used for community-wide planning and fundraising

Logic model for a project designed to build evaluation capacity

Because we heard

Resources are limited but interest is high

Not much evaluation going on

Agency anxiety about evaluation & accountability is high

Funder expectations may be unrealistic

We tried

Evaluation workshops for funded programs

Intensive consults for funded programs

Evaluation workshops and consults for funders

New, clearer reporting formats

So that

Improved evaluation skill

Less time required

Improved skill, more realistic expectations

Better accountability

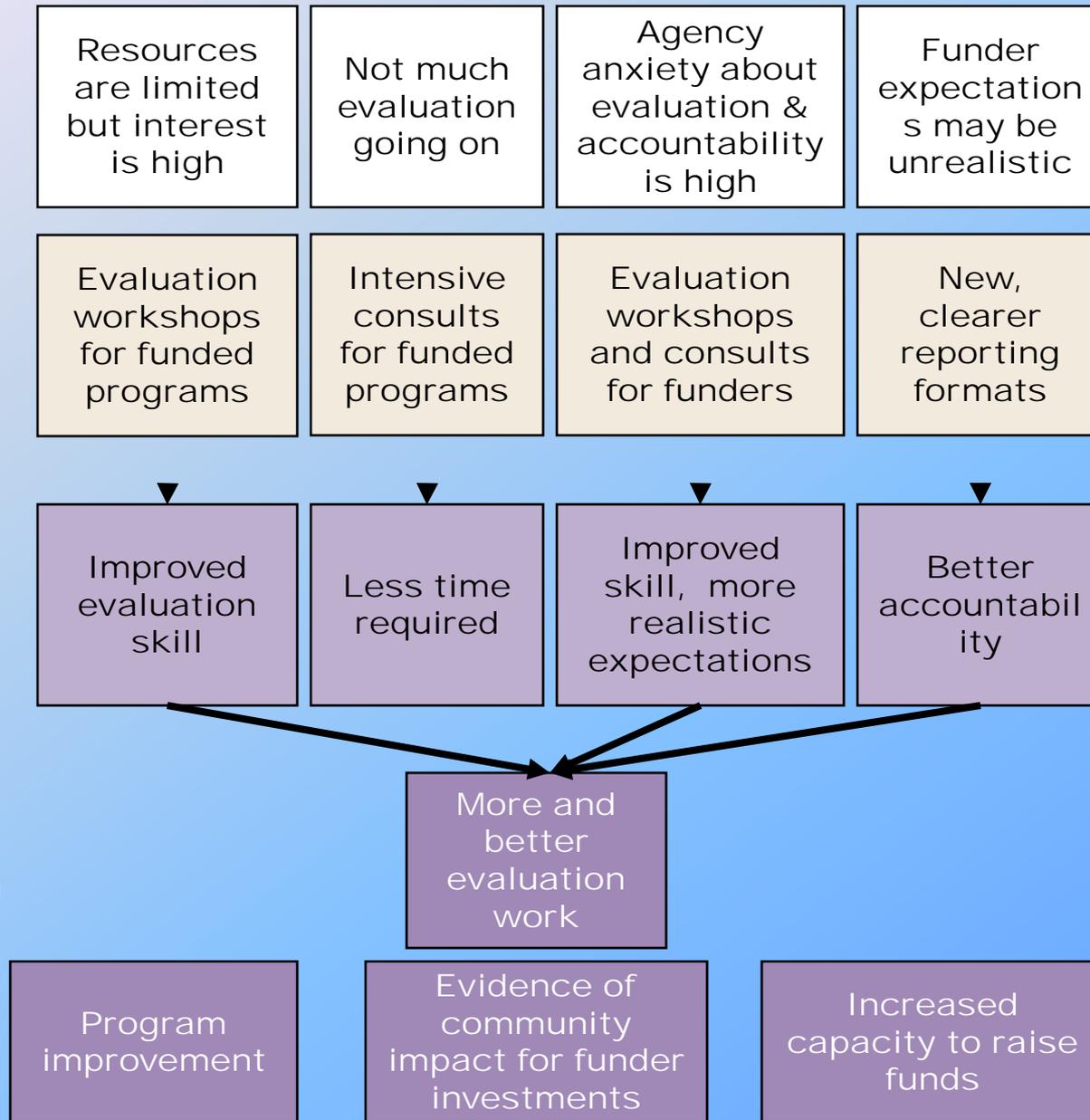
Long-term Outcomes

More and better evaluation work

Program improvement

Evidence of community impact for funder investments

Increased capacity to raise funds



What we learned from our evaluation of this work

- Funded agencies were becoming more skilled at evaluation
- They gave very positive feedback about the workshops
- Programs were developing and using logic models and identifying measurement priorities
- BUT funder self-evaluation didn't happen to any great degree
- The quality of actual outcomes measurement information being submitted to the funder wasn't improving much

Some things I started to notice

- People are clearly have a deeper understanding of theories of change than their logic models would suggest
 - The story of the testimonial letters
 - The story of the front line worker

Some things I started to notice

- The relationship between measurement and learning is clearly not simple or linear
 - The programs that seemed able to report on outcomes were not necessarily those that were doing the most measurement or the most sophisticated measurement
 - They were the ones with strong leadership, with support from a national association, with a willingness to share their mistakes and take risks

What is a “community of practice”?

What is the problem, really?

- Many approaches to evaluation (including the one we were using) talk about the world as if it were made up of mechanical systems rather than human communities. **But mechanical systems can't learn.**
- Many capacity building initiatives assume that they need to get programs to “buy into” evaluation so that they can start learning. **But they are clearly learning already, without our help. Evaluation seems neither necessary nor sufficient for learning to occur**

Andrew's Big Insight

- Tangible changes in knowledge or behaviour are **intimately interconnected with changes in relationships**
 - Addicts often need to rebuild their social networks to stay clean
 - Bad habits we had as kids often resurface when we're back with our family of origin
 - People who run programs learn and change when they begin relating differently to one another
- Learning can't occur without a community of practice

Maybe . . .

- Creating a context within which people can build communities of practice (i.e., build relationships that stimulate their natural inclination to learn and improve) **is more important than getting people to measure stuff.**

Maybe ...

- Creating a context within which people can build communities of practice **is more important than getting people to clearly articulate their intended outcomes.**
- Daniel Gilbert: *Stumbling on Happiness* (Vintage, 2006).

Maybe ...

- It isn't enough for us as evaluators to acknowledge that people and relationships are important, and then go back to talking with those people about abstract outcomes, indicators, and systems. **Maybe we need a clear, systematic body of knowledge and practice about how to cultivate environments which are fertile ground for the formation of strong relationships and communities of practice**

What do we as evaluators know about cultivating (and participating in) learning relationships?

- Some of Patton's tips on utilization focused evaluation talk about relationships
 - Building collaborative rel'ps with users
 - Overcoming fear and anxiety
 - Engendering an openness to change
- Ernie House (2000) has written about the value of in-depth deliberation or discernment
- Greene (2002) talks about linking evaluation to the democratic process by raising questions

Possible Principles for a Relationship-Focused Approach to Evaluation

1. Focus on who (specifically, personally) will be involved and what kind of role they need to play.
2. Focus on the kinds of relationships you hope to create among these people (multi-dimensional, partly personal as well as professional, trusting, egalitarian)
3. Focus on how communication & decision making will happen
4. Focus on the creation of a shared understanding of the question being explored or the problem that needs solving; live with lack of consensus on what to do about it
5. Don't stop. Continue to focus on relationships at all stages of planning, delivery, and evaluation

Building Learning Capacity in Complex Systems

Who, specifically, needs to be involved?
How will these people communicate?

Connecting:
talking about things



What kinds of relationships are we going for? How will decision making happen?

Acting:
trying things



What is the truth we have to share?
What is our shared understanding of the issue?

Reflecting & Discerning:
thinking about things

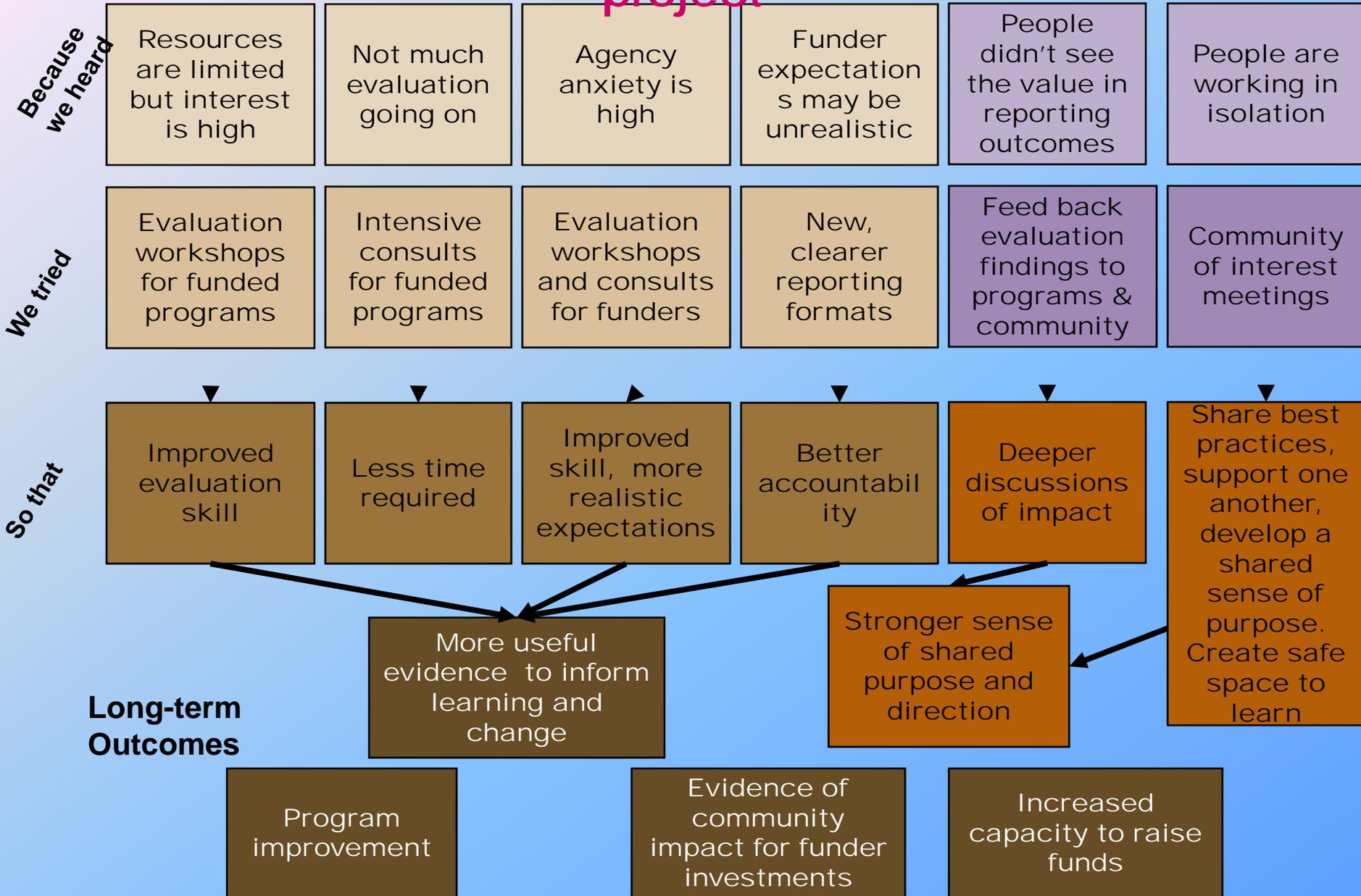


Listening:
Noticing things

Results, but also stories.
Answers, but also questions

How might I have
approached my project
with the United Way in a
more relationship-focused
way??

Revised logic model for evaluation capacity building project



Revised logic model for evaluation capacity building project

