How evaluation is shifting

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Evaluation of change is shifting to tracking and learning that leads to transformative pathways. This chart shows some of the ways that transformative evaluation is/could be changing. I'm adding links to specific articles that describe evaluation/learning in that question area.

I'm working on a bibliography, going through current articles on transformative evaluation, doing a short synopsis of each and then seeing if the questions below and the written piece include what is being raised in each one.

Question	Traditional	Transformative
Who is doing the evaluation?	Professional evaluators hired by funders	Network participants often cross sector and people impacted by the problem (including funders and evaluators as peers) involved in all steps of the process May be special participant roles such as network catalysts and facilitators from the network who facilitate learning processes, knowledge weavers who help participants harvest learning and new knowledge and productize it for sharing, etc May be guided by professional evaluators
What is the unit of evaluation?	A project or initiative	● Systems (iceberg) ● Networks ● Emergence: Flows, support system for transformation, and Self-organizing ● Learning/action/support projects Increasingly, organizations are working with others in networks on shifting whole systems

What is the evaluation process used for? Purpose?	For funders to determine whether to continue funding the project	- To enable reflective learning from actions taken so that network participants take better next steps - To capture learning, make sense of it collaboratively, share it widely and use for better next steps - To show how learning can be embedded in all aspects of a network's efforts - To help participants themselves and each other change their behavior, mindset and awareness - Get a sense whether efforts are going in the right direction and making a difference - Identifying impact in new ways - Determining whether the ecosystem for transformation is being developed
What are the questions the evaluation is trying to answer?	Did the project lead to stated outcomes?	Is the context/capacity/support ecosystem for systems transformation emerging? See Is the system (mental models [values, paradigms], structures & processes/flows, behavior, events) shifting toward greater wellbeing for all? Connections that increase capacity for collaboration and provocation
What data is being collected?	Data on outcomes toward goals	Outcomes are emergent - can't plan or state ahead of time - but can notice when innovative systems emerge (especially through learning communities) and amplify their impact. Stories are very useful here. Also helping participants be more aware of what is working. Can track the conditions for transformation: evidence of the development of self-organizing transformative networks, new mental models (a libratory culture/mindset, a support ecosystem (learning communities, trained facilitators/catalysts, communications ecosystems, restructured funds, harvesting, using and sharing what is learned)

		See Evaluation & Impact: on the road to transformation
Power: Who determines what is evaluated? And how will it be used?	The evaluators and funders	The network participants (including funders & evaluators)
What does the evaluative/ learning process look like?	Evaluators gather quantitative and qualitative data, then analyze it, then write up a report for funder and sometimes for public.	Network participants co-design purpose and process, what data will be collected, how the network will use the results; data is analyzed by participants as well as funders and evaluators and used in next steps Or Evaluation is replaced with embedding of learning and collaborative analysis/sense making in every aspect of the network's work to harvest insights, breakthroughs, innovations which are used for next steps
What are methods?	Evaluators use surveys, interviews	Gathering of stories, embedded data collection (
What kind of mindset is needed?	Linear, methodical, rational, judging	Openness, acute awareness of self and others (human and nature), relational, comfortable with uncertainty, learning, open to insights and new ways of seeing,

What is done with the evaluation results?	Report is shared with funder and sometimes published for the public	Learnings and new knowledge are used to take better next steps as well as shared with other collaboratives, learning communities, the full network, and networks of networks - often in the form of stories; some shared in open learning communities where participants have a chance to explore how to adapt patterns of success to their context Learning is harvested and productized for easy sharing in shared resource data base with learning pathways
How are theories undergirding the process developed?	Evaluator(s) funders or NGO develop Theories of Change Developed through a planning process	Development of theory of transformative trajectories is becoming more *participative,* often part of learning communities made up of network participants of various networks along with funders and expert evaluators. There are likely to be multiple theories of transformation, many of them contextual, Theories of change are living - they are continually revised and woven together - as the result of using them and learning from that application and what emerges. The process involves facilitating emergent collaborative sensemaking / visioning / purpose / values process (& continually review, at micro & meta levels)

Assessing the Field: Impact

Starting insights & hypotheses on how alumni networks and funders approach impact

<mark>Draft document – please comment!</mark>

1. Many networks recognize **emergence** as an important principle – we can't expect everything, impact is often non-linear, opportunities with potential impact arise unexpectedly, and there is usually more than one pathway to success. There is however a lack of clarity around how to

identify and track such emergence (outcome harvesting may be one approach). And many funders don't provide structures that enable emergence to be considered in impact.

2. There is a wide consensus that **connections** are highly valuable in network work – for their individual and collaborative effects. There is less consensus on what impact connections lead to; and debate about weak connections vs strong connections, which you need for information flow, which you need for collaboration, and where trust sits in the mix. Also, tracking connections is time-consuming: tools like SNA are complex and unwieldy, especially with a large network. Many / most networks don't track connections and their impact deeply.

3. **Qualitative** impact, especially stories, is seen as critical to understand impact. There is also a growing consensus around this being a more participatory way of telling the narrative of the impact, but most networks are in relatively early stages of doing this. Also, qualitative data is however time-consuming to collect, and only captures a margin of the overall picture.

4. There is a constant struggle between balancing long-term visions / theories of change with short-term objectives – within and across organizations and funders. Although both are often seen as important, usually the shorter-term is prioritized. This is despite the fact that impact usually happens over **time**, and needs careful and adaptive grooming through that process. The sector may need an approach that allows short-term objectives (or interim outcomes) to be regularly reviewed and adjusted, while instead holding on more tightly to the longer-term vision.

5. Impact is still often defined by the backbone organization's priorities rather than what the network participants want / demand. Some organizations facilitate processes of collective visioning and prioritization of long-term impact goals, though this is not always engaging across the whole network. The sector may benefit from greater emphasis on measuring impact against what the **community** wants and needs – although this should somehow be aligned to broader visions and systems change theories.

6. Power struggles are present across all levels of the nodes. Grantees are often viewed as beneficiaries who need monitoring and control (or, sometimes, who can benefit from an entirely unrestricted approach). Network members instead are more often viewed as stakeholders, who can benefit from the network and need to be "brought in". The sector may likely benefit from a collective **shareholder**-based approach, where all levels are viewed as partners who simultaneously benefit from the impact. In such an approach, shareholders can together regularly co-create, review, and make adjustments to impact goals.

7. Similarly, impact measurement is still widely approached as an "extraction" or "measurement" process, in which the backbone organization tries to identify data to process internally. Less see impact as a **learning** process, in which data is collaboratively identified and collectively

reflected on to determine what we've done and how we can use that information to move forward. Although there are a growing number of organisations looking at learning outcomes as part of the impact measurement process, which is worth exploring more.

8. We tend to focus on "what has gone well", rather than what hasn't worked. We should embrace **failure** as an important part of impact analysis, and feel free to not only measure but also share it (provided of course funders embrace this, and it isn't an impediment to future funding). Similarly, we should consider intentionally trying to assess impact with those who from the outside – who are not engaged, or not affected by the process – to better understand what can be done better, and what we're not seeing.

9. Networks and funders outline a wide range of indicators that can be measured. However trying to capture all may be too resource intensive. Lean approaches, such as short surveys, can help – though these are limited in what they can capture and in response rate. Instead, especially for larger networks, we most likely benefit from embracing a **decentralized** approach to impact measurement – in which we give power to the network to measure, reflect on, and make decisions related to its impact.

10. Similarly, impact measurement is often seen as a one-off or timed process, which occurs in infrequent intervals. Instead, a more **frequent** ongoing process of measuring and learning can not only reduce constraints, but allow more flexibility, adaptability, and regular learning. Importantly, impact analysis can be embedded within existing processes – like meetings and events – rather than seen as something separate.

11. Impact is often viewed as overarching, but in reality is incredibly nuanced and context-specific. While impact should be rooted in an overall vision, objectives should be more **localized**. This can translate into co-created objectives and goals at regional and local levels.

12. Considering all the points above, it's important to recognize the difference between **programme** impact and network impact. Most fundamentally, programme impact is about inputs (new knowledge, new funding etc) and what they lead to – therefore they will always require more input / more investment, and so by design are not especially sustainable. Networks instead are about organising what is already there: insights, ideas and energy that might be dormant and activated and multiplied, but not an external injection. This wonderful aspect of networks is not focused on enough.

13. That said, many believe networks can lead towards more **systemic** / transformational change, but there is a significant gap of understand on how this can happen. It generally seems to be perceived as something that emerges through collaboration, but current systems change literature suggests instead that it should be designed from the start and highly facilitated across multiple actors. Finding that sweet spot between approaches for network emergence and facilitated systemic change is probably the "next big thing" for networks!