evallab

Supporting Evaluative Thinking in Everyday Practice

2018 REPORT

EVALUATION CAPACITY NETWORK

Alberta

Edmonton Chamber of Voluntary Organizations

To cite this report, please use the following:

We would also like to thank FCSS for their generous support of the Lab.

"The seeds that are dropped here, you're forever changed by how you're thinking about it."

- Eval Lab Participant, 2018

Contents

1   Context

The Need for the Eval Lab

With an increasing push for evaluation in the nonprofit sector, organizations face the difficult task of incorporating evaluation into their day-to-day work while often having only minimal resources and expertise to do so. Evaluation can become a peripheral part of the design and delivery of services and programs – a check on the funding checklist – rather than a significant tool for making improvements in environments of complexity. In response to this dilemma, concepts such as strategic learning have emerged to integrate evaluative thinking into the work of nonprofits for improved learning, decision-making, and adaptation. But how do strategic learning and evaluative thinking work in practice? And how can they provide feasible and useful means of shifting thinking and decision-making in nonprofit organizations? To answer these questions and explore the possibilities of evaluation in the social sector, Edmonton Chamber of Voluntary Organizations, the Community Development Unit (Alberta Culture, Multiculturalism and the Status of Women), and the Evaluation Capacity Network (Community-University Partnership for the Study of Children, Youth and Families, University of Alberta) collaborated to design and convene the Eval Lab, which was launched in 2018.


What is the Eval Lab?

The Eval Lab was designed as a social lab that was intended to 'de-mystify' evaluation and explore how nonprofits can integrate evaluative thinking into their practices to improve learning and decision-making. Social labs are spaces that bring diverse people together to address complex social challenges through experimental and iterative processes (Hassan, 2014). The lab setting is a flexible co-learning environment for developing and 'testing' evaluative concepts and tools and applying these concepts to practice-based, social sector settings. Our broader intention of the Eval Lab is to support evaluative thinking and critical reflection in the sector to improve practices, policies, and research to address complex social issues.

> "
> How do strategic learning and evaluative thinking work in practice, and can they provide feasible and useful ways of fostering learning in nonprofit organizations?
> "

3.

Our Theory of Change

Through the Eval Lab, we sought to re-centralize learning in the evaluative process and make evaluation accessible, feasible, and meaningful for individuals working in the social sector. We felt that <u>if</u> evaluation is less intimidating and more useful to practitioners, <u>then</u> they would be more likely to use evaluation as a tool of learning and improvement in their organizations to enhance programs, policies and practices. Systems thinking provided a foundation for learning and enabled Eval Lab participants to situate themselves within and across numerous systems contexts, and levels (individual, organization, broader environment) to understand the impact of their work on both a smaller and a larger scale. We also felt that <u>if</u> practitioners were able to view their work within a larger social system and move across the various levels of the system, <u>then</u> they would be better able to make informed strategic decisions that benefit their organizations, their communities, and the system as a whole.

If

Evaluation is less intimidating and more useful to practitioners...

Then

...practitioners are more likely to use evaluation for learning and improvement.

If

Practitioners are able to navigate the larger social system...

Then

...they are better able to make informed strategic decisions.
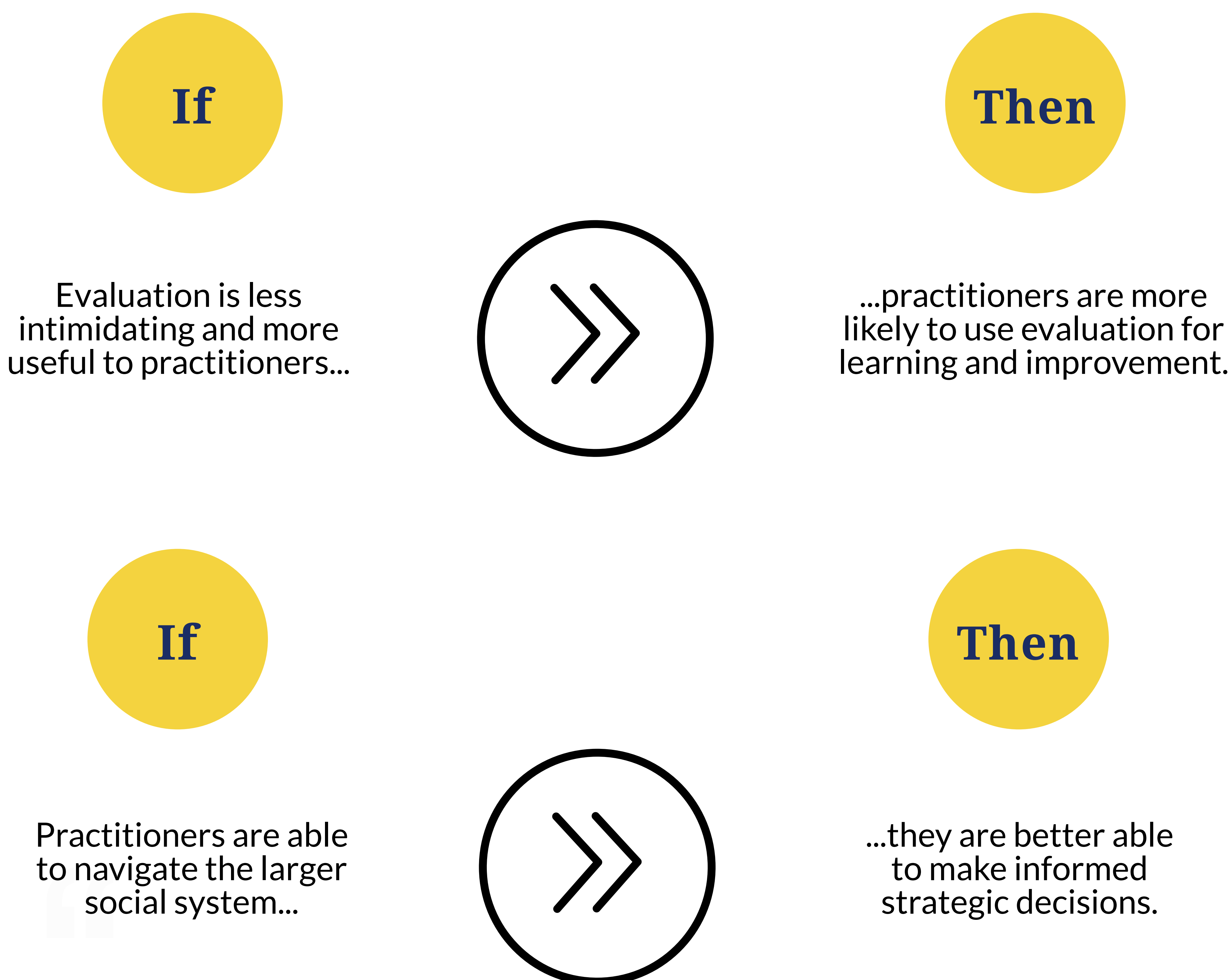
Underlying Philosophy

There were several principles that guided the creation and facilitation of the Lab to support our overarching desire to provide an accessible, meaningful learning experience for participants. These principles included:

Adaptation and Flexibility

We believed it was essential to 'meet people where they were at' in the learning process and apply an individualized and flexible approach to the Lab. We adapted the content over the duration of the Lab to respond to the needs and desires of the cohort. To do this, we continuously asked participants about their desires for learning, garnered their feedback about content and process, engaged in our own reflective processes as facilitators, and adapted content accordingly.

Contextualized Learning

The Lab curriculum was founded on the need to apply concepts such as strategic learning, developmental evaluation, and evaluative thinking 'in practice' so that they became useful to participants in their work. As such, contextualized learning, and the ability to situate learning across various systems and environments, was foundational.

Comfort with Uncertainty

The pursuit for data in the social sector is largely characterized by a desire for 'proof' and certainty, which often reduces rather than enhances learning and improvement. With a focus on improving decision making capacity in the social sector rather than seeking (seemingly) definitive answers, the Lab attempted to increase participants' comfort with the messiness inherent in learning and their capacity to navigate spaces of uncertainty and change. This approach also applied to the facilitation and provided a guiding approach to support our own adaptation and flexibility within the Eval Lab process.

Broad Understanding of Evidence

Related to the need to embrace messiness and uncertainty as a principle for learning, we felt it was essential to encourage a broad understanding of evidence and a recognition that multiple forms of data can be used to inform our practices in the social sector. Participants were therefore encouraged to recognize the wealth of data and information available to them to generate knowledge and wisdom about their policies and practices.

Critical Thinking

In practice, thinking evaluatively and strategically requires the capacity to assess the immediate and broader context or environment in which you are working, systematically identify relevant information and gaps in understanding, generate and synthesize information, make sense of this information, and apply learning in order to respond and adapt. Critical thinking is an essential part of this process to question what is taken-for-granted (our assumptions), know what is relevant, and to discern between the signal and the noise.

2   Eval Lab 1.0

Structure

The Eval Lab took place over 8 months, between April and November of 2018, at the Action Lab (Skills Society). The Lab comprised six full-day sessions and one individualized coaching session. It was structured to allow sufficient time between each session to 'test' concepts and learning through assigned projects. A cohort of 10 participants was selected through an application process that asked individuals to reflect on what they wanted to achieve through their participation in the Lab and was specifically targeted towards individuals who were curious, open-minded, critical, reflective, and willing to embrace uncertainty. Although initially intended for team managers, the final cohort included executive directors, team managers, and internal evaluators from non-profit organizations.

Participating Organizations

Nine organizations of varying sizes and with different mandates were represented in the Eval Lab. A list of these are provided below:

- Cultural Connection Institute
- Land Stewardship Centre
- KARA Family Resource Centre
- Community Options: A Society for Children and Families
- Early Childhood Development Support Services
- Alberta Public Interest Research Group
- Tetra Society of North America
- Getting Ready for Inclusion Today (GRIT) Program
- Action Coalition on Human Trafficking

> The Eval Lab was specifically targeted towards individuals who were curious, open-minded, critical, reflective, and willing to embrace uncertainty.

Curriculum

The Eval Lab curriculum was developed and facilitated by Pieter de Vos (Community Development Unit), Bethan Kingsley (Community-University Partnership) and Gemma Dunn (Edmonton Chamber of Voluntary Organizations). The following table provides an outline of the content covered in each of the six sessions, including the specific concepts and tools explored.

Session 1	Session 2	Session 3	Session 4	Session 5	Session 6
Foundation Building: Orientation and Context	Exploring Complexity and Outcomes	Building Learning Frameworks	Exploring Strategy	Asking the Difficult Questions	Celebrating Our Learning
Participants became familiarized with the Eval Lab and started to explore the role of learning in their own contexts.	*Participants explored the implications of learning within complex environments.*	*Participants created flexible learning plans that supported their individual and organizational learning goals and intentions.*	*Participants learned about emergent strategy and started to make sense of information gathered through data collection processes.*	*Participants had the opportunity to ask an 'expert' their confounding questions and share this learning with others.*	*Participants reflected on their learning experiences during the Eval Lab (including suggestions for improvement).*
Tools and Concepts	**Tools and Concepts**	**Tools and Concepts**	**Tools and Concepts**	**Tools and Concepts**	**Tools and Concepts**
• Purpose to Practice • Adaptive Cycle • Evaluation and Evaluative Thinking • Collective Impact • System 1 and 2 Thinking	• Complexity • Attribution vs. Contribution • Systems Thinking • Iceberg Analysis • Theories of Change	• Learning Journey Map • ORID • Evaluative Questions • Users and Uses • Capturing Data	• Strategic Planning • Cognitive Bias • Systems Thinking • Empathy Mapping • Design • Environmental Scanning • Data gathering methods	• N/A	• N/A

<table>
<tr><td>3</td><td># Evaluation of the Lab</td></tr>
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Purpose

As an entirely new and unique initiative and without an existing model upon which to base the Eval Lab, we conducted our own internal evaluation process throughout the delivery of the Lab to adapt and improve the curriculum and our processes as we went. Information gathered was also used to modify the content for Eval Lab 2.0, which will begin in October 2019.

Methods

During the Lab we used several methods to gather information about the content and delivery of the Lab. This included asking for feedback from participants at frequent intervals and included our own reflections about the process as facilitators. Examples of these methods are provided below:
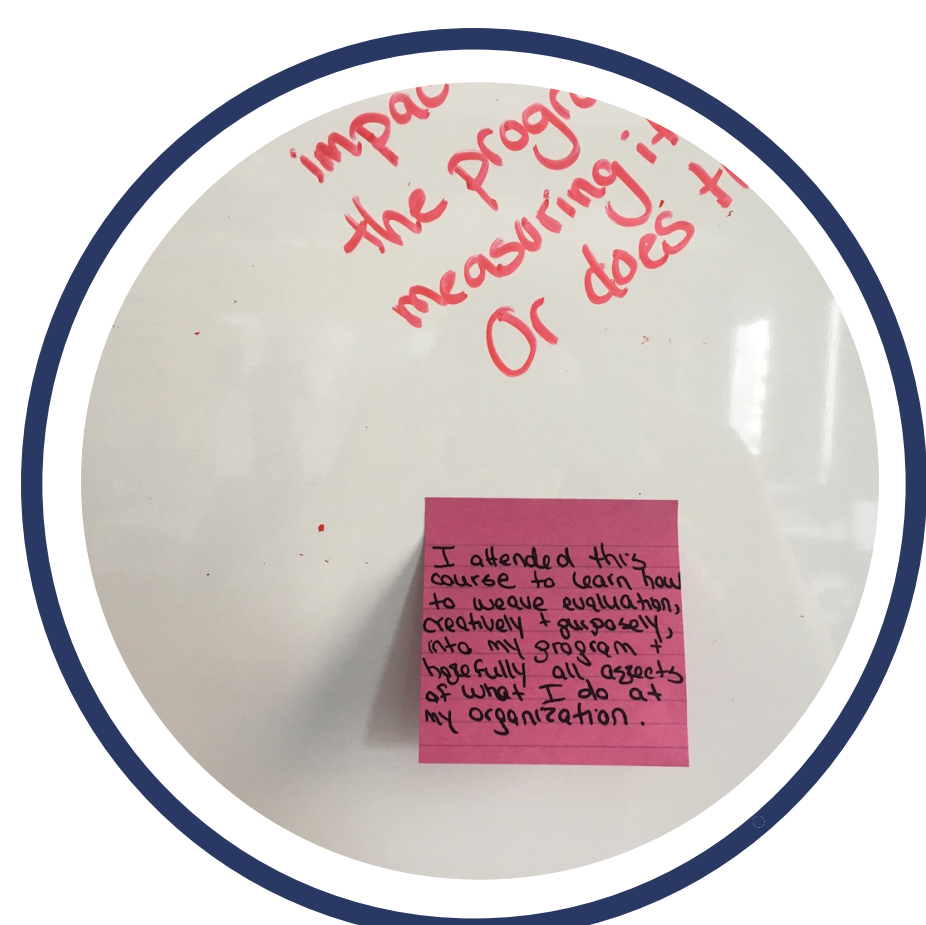
- **Check-in and Debriefs:** At the end of session one, we asked participants to answer the following questions based on the day's content: **"What is sticking for you?" "What is puzzling?" "What is promising?"** The information was used by facilitators to inform their debrief process and make changes for the second session.
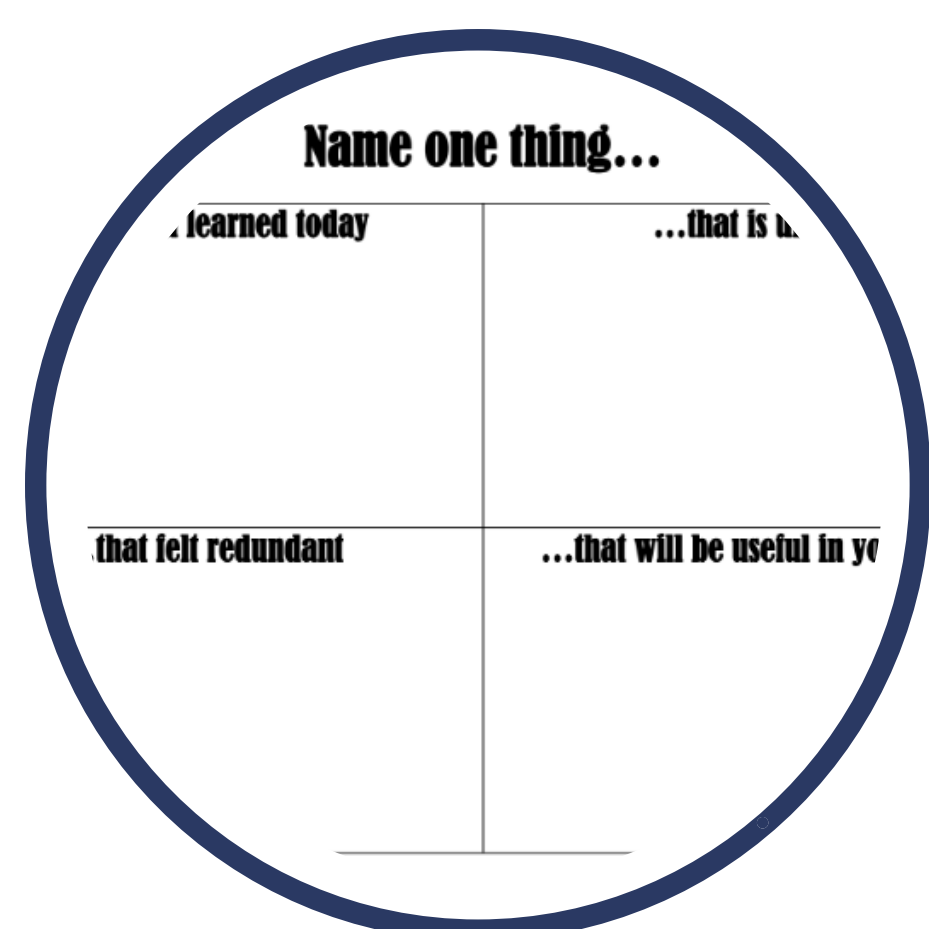
- **Snapshot Survey**: At the end of session two, we asked participants to fill out a snapshot survey comprising four qualitative questions.
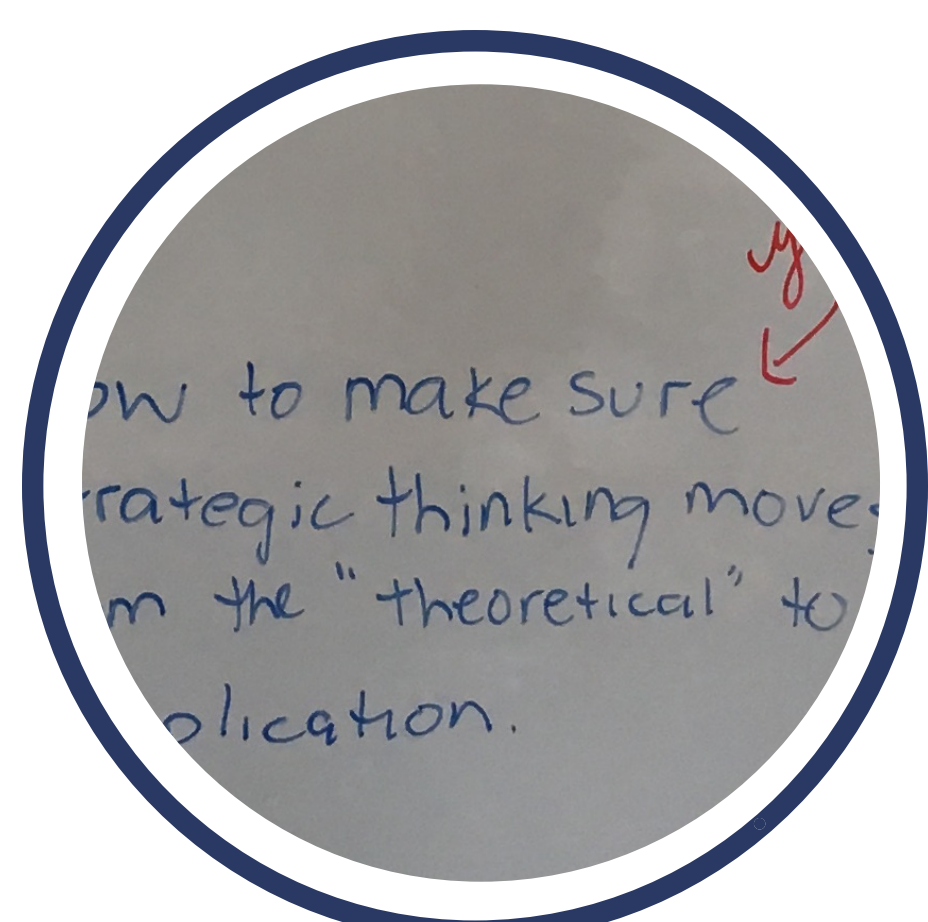

- **Open Space/World Cafe** (4 stations): To help inform the focus for the later sessions and ensure content reflected the interests of the participants, we asked participants to move around the room and respond to four overarching questions (below). The information gained shaped sessions 4 and 5.

  o What do you want to learn about strategy and strategic thinking?
  o What do you want to learn about evaluative thinking?
  o What do you want to learn about analysis or sense making?
 o What other related topics might we explore?

8.

Methods (continued)

- We asked a number of participants to write **blog posts** at different stages of the Lab to articulate their learning from the Lab. These were shared through the Eval Lab website (see image below, taken from evallab.ca).

- The final session involved a culminating **learning event** where participants were asked to demonstrate their learning from the Eval Lab. To stimulate creativity, we requested that participants use at least two forms of media other than PowerPoint (for example, words and images). These presentations were audio recorded and used to inform the modification of curriculum for the second round of Eval Lab (2.0).

- In addition, we displayed **content slides** from the six sessions around the room and asked participants for feedback ("good", "less of this", "more depth needed").

- Finally, as facilitators we maintained our own **reflection processes** throughout the Lab (e.g., using journals to take notes during sessions) and these informed curriculum development and modifications.

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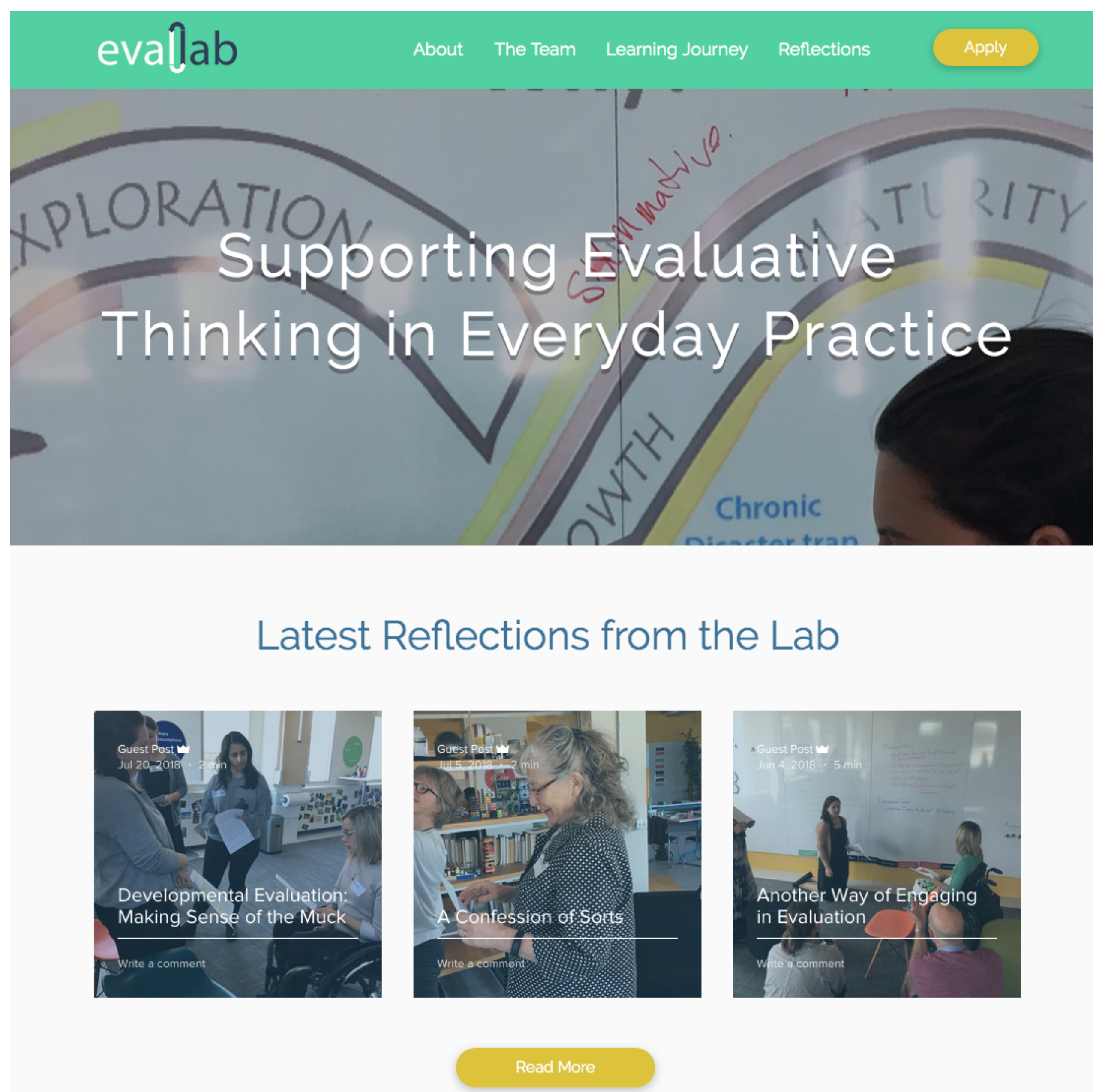
Learning

The information gained through the outlined methods has informed the process and curriculum that will be used when we offer the second iteration of Eval Lab. For example, we believe it was hugely beneficial to have two participants from the same organization, and will more intentionally seek to bring small 'teams' or coalitions into the Lab the next time it is offered. Relating to curriculum changes, we intend to centralize the Learning Journey Map to structure the Lab sessions and tie content more explicitly to this tool (see image below).
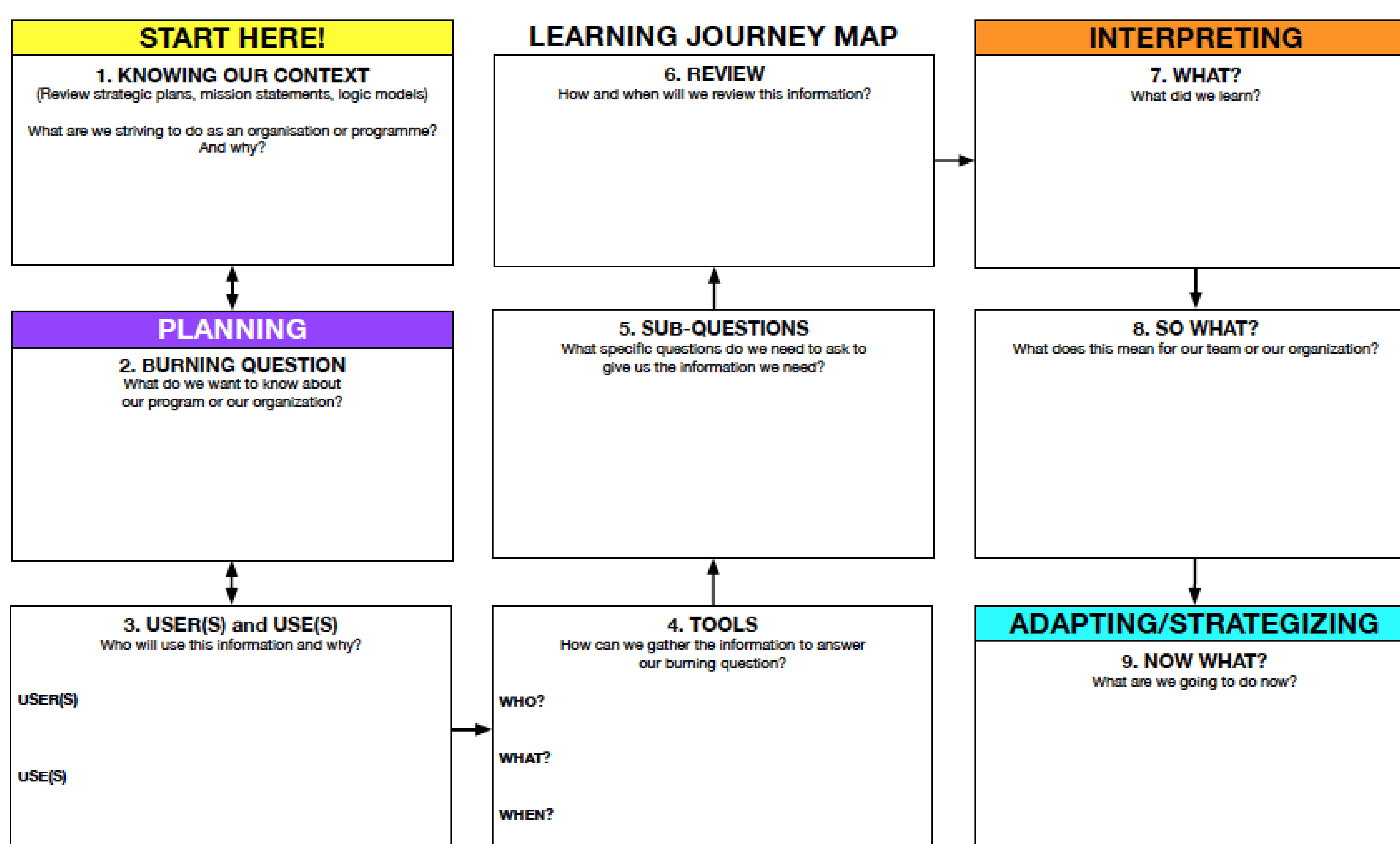
Beyond these logistical and curriculum modifications, participants articulated some important learning that came from their experience of the Lab. We have captured this learning through three 'cases' that represent the experiences of lab participants.

> I have a better understanding of what evaluation can achieve if you're willing to open yourself up to learning.
>
> - Eval Lab Participant, 2018

10.

"Since joining Eval Lab the direction of my small non-profit has drastically changed. I have a much clearer focus on the impact I want to make and while the path there is still uncertain, I know the future is bright because while I'm in the muck I am getting busy learning instead of just getting dirty!

1 **Brittney**

Organization: Local chapter of a North American organization that produces custom assistive technology.

Brittney is the lead coordinator of a local chapter of a large North American organization that designs and builds custom assistive technology for people experiencing disability. When Brittney came to the Lab, her initial focus was on building high-quality assistive technology and the need to find volunteers to build this technology over the longer term. Early on, she realized that rather than focusing solely on the quality of device production she needed to more fully consider whether the devices they made actually reduced barriers for individuals to be able to live more fully in their communities. To address this, she broadened her evaluative focus to attend to the extent to which assistive devices enhanced people's ability to engage in their communities and in everyday life. Through informal and formal interviews over the course of the Lab, Brittney spoke with volunteers (who made the devices) and the clients (who received the devices) to understand their perspectives and included them in decision-making processes. She also facilitated a stronger relationship between the volunteers and clients to increase the likelihood that devices would more fully meet the needs of clients and support the broader goal of social participation.

My previous brushes with developmental evaluation excited me, but I couldn't seem take the vital step of actually engaging with the ideas. I needed the framework of Eval Lab to be able to both make the information accessible to me and provide me with dedicated time to begin to use it."

2 Angela

Organization: Provincial capacity-building organization for Early Childhood Development.

Angela is the program coordinator for an organization that provides professional development and organizational supports to early childhood professionals and organizations. She came to the Eval Lab with an interest in how developmental evaluation could be useful to her work, and wanted to better understand the impact of her organization's capacity building efforts on professionals in the early childhood field. After numerous years of administering surveys to professionals to assess their training and educational programming, Angela felt there was a better way to evaluate their capacity building efforts. In part, she believed there was something 'out there' that would tell her the best way to build the capacity of early childhood professionals. Through a review of literature and a series of interviews with her colleagues, she came to understand that there was no one universally-appropriate method for building professional capacity and gained assurance that working within the 'grey' was actually the best way to do practice. Through this process, Angela began to trust the information her team already had available to them about the efficacy and appropriateness of programs, and used this information to make context-relevant changes. Asked about her learning from the Lab, Angela said, "[That] anecdotal evidence is still evidence, qualitative data is still data, and if people tell you something, believe them!" There is probably some learning in that for us all.

> *It's unfinished work yet, evaluation always continues. I feel that now I have new tools to work with in discussing and assessing ongoing operations and new projects as they develop.*

3 Margaret

Organization: A regional organization serving children and families in Edmonton and surrounding area.

Margaret is the Executive Director of an organization that supports the diverse needs of children and families through inclusive early childhood education and community initiatives. She came to the Lab wanting broaden her understanding and skillset in strategic learning and become better positioned to respond to the challenges she was facing in her day-to-day work. As a result of the Eval Lab, Margaret facilitated a series of focused conversations to establish a 'burning question' that was of interest to staff in her organization. Through these strategic conversations, she realized the question she had originally come into the Lab with was not the one her staff members wanted to answer. Her priority subsequently shifted from a focus on external outcomes to a focus on the internal workings of their organization in order to find areas for improvement and coordination across multiple programs. Over the six months and drawing on numerous tools from the Lab, staff collectively developed a team charter to guide their organizational work and serve as a reference point for new and existing staff.

Summary

Participants shared that through the Eval Lab they gained an increased ability to navigate uncertainty and to challenge their assumptions by asking new questions and developing new methods for answering these questions. By applying evaluative thinking and strategic learning to their workplace contexts, participants acquired the capacity to identify and use data to improve their decision-making. Through the creation of spaces such as Eval Lab that support reflective practice, we can collectively wade through the messiness of working to address complex social challenges and pay attention to important areas of learning. It is our hope that in doing so, we can improve our practices and policies in ways that will enhance the sector and the broader community.
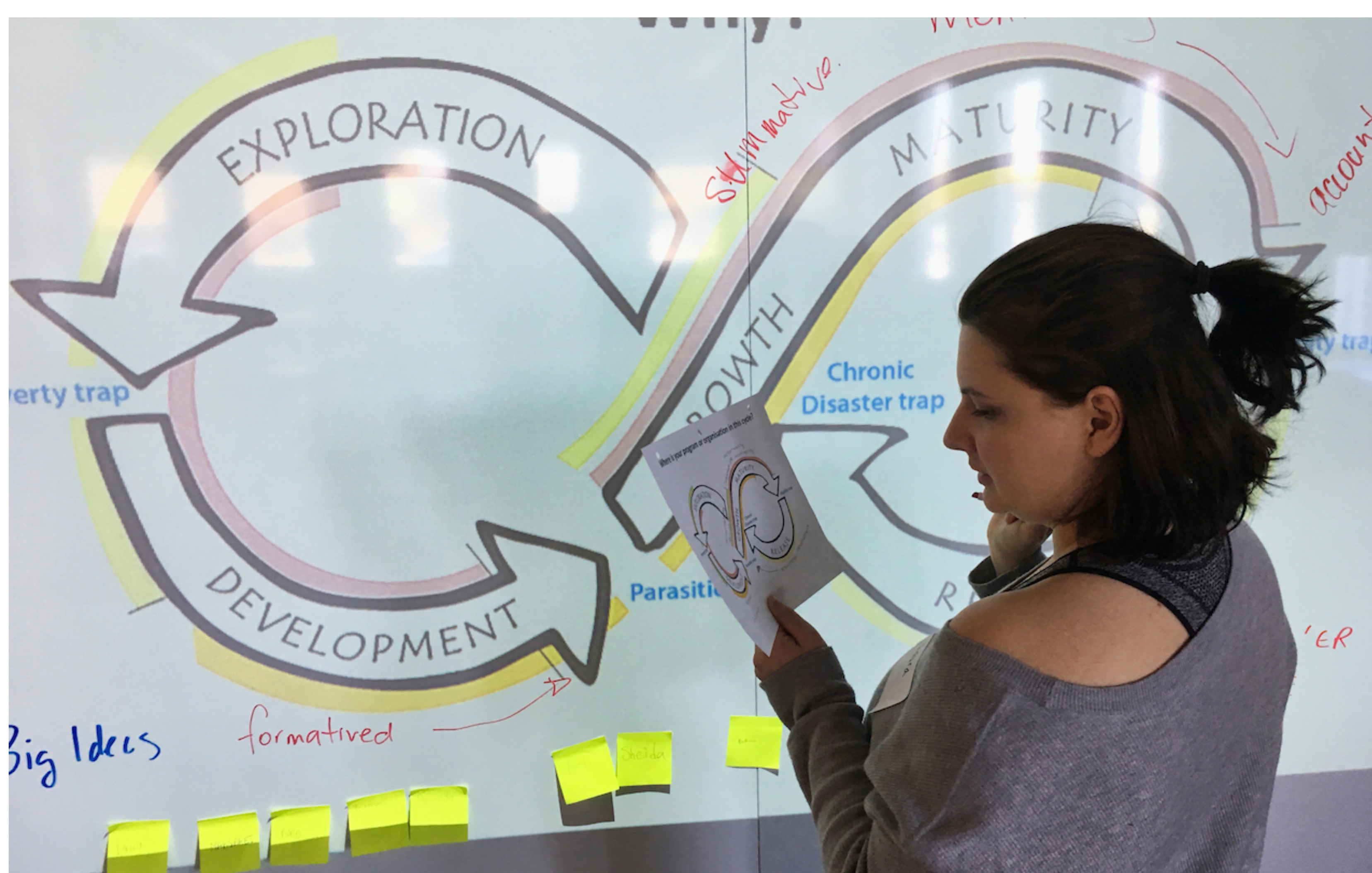
What's Next for Eval Lab?

We are currently developing the next iteration of the Eval Lab, which will be hosted between October 2019 and April 2020. With an aim to expand our reach, we will be focusing on members of collectives working across Alberta. For more information, or to apply, please visit evallab.ca (link below)

evallab.ca

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July 2019

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