

Strategic Evaluation Trends | Text Transcript | The Hub for Teaching & Learning Excellence

This is a text transcript for the event “Strategic Evaluation Trends,” recorded on November 15, 2018. This event was co-hosted by The Hub for Teaching and Learning Excellence, the Community Engaged Scholarship Institute, the Department of Geography, Environment and Geomatics, and the Kinross Chair in Environmental Governance.

Transcript:

Mary Granskou:

First, that we acknowledge that the University of Guelph resides on the ancestral lands of the Attawandaron people, and the treaty lands and territory of the Mississaugas of the Credit.

We recognize the significance of the Dish with One Spoon Covenant to this land and offer our respect to our Anishinaabe, Haudenosaunee and Métis neighbors, as we strive to strengthen our relationships with them.

Byron Sheldrick:

So, thank you all for coming.

My name's Byron Sheldrick, and I'm the Associate Dean, academic, for the College of Social and Applied Human Sciences.

And I'm gonna stand somewhere where I hope I'm close to a mic.

Liz Jackson:

Wanna sit down?

Byron Sheldrick:

No, it's fine.

And welcome, this is the third Lunch and Learn in this year's series, that are being sponsored by the Hub for Teaching and Learning Excellence in the College of Social and Applied Human Sciences.

And I'm very happy today that we're having this session on trends in strategic evaluation.

And we have a great panel here, who have all sorts of insights on the topic, and hopefully we can have a variety of takeaways and think about how these questions of evaluation relate to our teaching in a variety of ways.

I'm not gonna introduce the entire panel, but instead I'm gonna welcome Mary Granskou, who's the Kinross Chair in Environmental Governance at the University of Guelph, housed in the Department of Geography, Environment, and Geomatics. And I'm very careful to remember the full name of the department—

Mary Granskou:

And there's a comma in there, too.

Byron Sheldrick:

That has recently changed. There is. An Oxford comma, hopefully, no. Well, there should be, then. Never mind, let's not get into that debate, the whole hour will be lost.

So, Mary has, I'm not gonna read Mary's CV or her entire bio, but she has an impressive record of working in a variety of contexts related to the environment, sustainability, working with Indigenous peoples, both in government and the non-profit, non-governmental sector.

And a lot of her research and work is around partnerships, and the possibilities of partnerships in terms of promoting significant environmental change and sustainability, and so we're very fortunate to have Mary with us this semester as the Kinross Chair, and also here to lead us through this discussion.

So I'll turn it over to Mary.

Mary Granskou:

Thank you, Byron, you're too kind.

Yes, call myself a proud generalist, constructive rabble-rouser, et cetera, et cetera.

So, I am not a practitioner in evaluation, I am an observer and an admirer of an evaluation well done.

So, we have a wonderful panel here today, and, to talk to us, really, about the opportunity that evaluation presents, and the trends.

And when we were brainstorming as a group, and the group being the department, Geography, Environment and Geomatics, CESI, the Community Engaged Scholarship Institute, and the Hub for Teaching and Learning, we were brainstorming as a small team about organizing this. We were talking about, well, evaluation from drudgery to opportunity.

So, you know, this is not about checking the boxes, this is really about strategic, and opening up the window, what's happening in the EU and elsewhere around the trends, and kind of with a message that it's coming to a neighborhood near you, you know, for a lot of the research community are kind of getting ready, you know, a readiness for this, I'm sure many of you are already experiencing this shift. And stronger rising emphasis in the practice.

So, what I'd like to do first is introduce Liz Jackson, who's gonna moderate the discussion, the conversation here today.

So, Liz is the Director of CESI, the Community Engaged Scholarship Institute here on campus. In this role, Liz builds on her research and teaching expertise in collaboration, community engaged research, and interdisciplinary approaches to social justice.

So, CESI really is all about, I'm sure many of you are familiar with CESI, but for those of you who aren't, it fosters meaningful engagement and partnerships across faculty, students, and the broader community.

So, welcome and thank you, Liz.

And our next speaker, Andrew Taylor co-owns Taylor Newberry Consulting here in town, and is an evaluation consultant and trainer with over 25 years of experience in the field.

He is a Guelph alumni, and PhD in Psychology, and is now an adjunct professor with the department.

Andrew's a frequent commentator about the trends I've been mentioning amongst grantmaking institutions, and he's also a researcher with the Harwood Institute in Washington, DC. Thank you, Andrew.

Our third panelist, Lee-Ann Sutherland, another Guelph alumni, was raised on her family's farm here in Ontario, moved to the UK to do her PhD on the Sociology of Agriculture, and stayed.

She is now a research leader at the James Hutton Institute in Aberdeen, Scotland, where she guides a science team focused on environmental decision-making, sustainability, and social justice within the agriculture sector.

She is with us now as a visiting professor, sponsored by the Arrell Food Institute, housed at Geography and CESI as well, under the CESI umbrella.

So, welcome everyone, and Andrew, well, Liz, take it away.

Liz Jackson:

I'm going to be moderating a group discussion, well, actually, a fulsome discussion, after each panelist has a chance to present, so the format today is kind of structured, unstructured. So, the first half of our time will be short contributions from each panelist, and then we'll use our last 20 to 30 minutes having a moderated discussion.

I've brought a few questions that I think will help weave together these really diverse perspectives on how we should practice, and we're gonna make sure to leave room for questions from you in the room as well.

I think we have a really robust range of orientations on the panel and in the room, from the work I know that some of you do.

So, some people here wanna talk about evaluating the curriculum and its impacts, some people wanna talk about evaluation as a social practice, some people wanna talk about research excellence in sciences and other disciplines, so my job is gonna be to try to make that feel like a woven-together thing, rather than weird prickly things.

So, you can tell me at the end how I did.

All right, so, Andrew, I think you're gonna speak first.

Andrew Taylor:

Sure, so, before we get into the panel full-on, Mary asked me to sort of frame up the theme a little bit on what we're discussing, which perhaps gives me an unfair advantage when it comes to the panel discussion, I don't know, but we'll take it from there.

So I just, and not to comment too much about my work, but sort of why we chose this topic, and I think, you know, program evaluation, really, is simply the systematic analysis of information using all of the skills we have in our social science toolbox. But for the purpose of checking to see whether a particular intervention is working. Checking to see how a particular intervention in the world can be made better.

So, the audience is different than it is for academic research, and the purpose is different. We're really very strongly action-focused.

So, in some respects, I feel like program evaluation is, the practice of program evaluation is quintessentially community-engaged scholarship that aspires to take everything we know and apply it to learning about action in the real world.

And along the way, the interesting thing is that you end up needing this whole sort of other set of skills, besides the social research skills.

You need to be a bit of a facilitator and a bit of a, you know, a bit of a knowledge mobilizer, and know a little bit about management and organizational theory, and all that kind of thing.

So, it ends up being an interesting, what one of the founders of the field calls a sort of a meta-discipline, you know, where you're synthesizing a bunch of different skillsets. And so, I think that appeals to a lot of us as well, on our learning journeys around the idea that we're bringing together multiple skillsets.

I think that the practice of evaluation is growing, it's something that lots of organizations are interested in. The government is interested in it, as far as we know. By the statement today by the provincial government, maybe they're not anymore, I don't know. But the, generally speaking, there's a lot of, a lot of interest in it, and I think that it's evolving in a couple of different ways at the same time, and I sort of feel like our discussion today comes at a point where evaluation is perhaps at a bit of a crossroads.

On the one hand, I think there is a push that concerns me towards evaluation as a tool of risk management, social control, and accountability, right?

So, we will only give money to folks that know for sure they're going to make a difference, and even when we do give money to people, we will make them check back with us to prove that they've made a difference, and that's how we'll make sure. And so you see things like pay for success investment from grantmakers sometimes, right? Where they say, we'll only give out the money once you've shown that you've made a difference.

And I think that creates a situation where it's tough to really be thoughtful and critical about what you're learning, because so much is riding on getting positive answers, right? From your evaluation.

At the same time, I think evaluation is also potentially growing in the exact opposite direction, or in a much more exciting and interesting direction, I think, where people are starting to see that this is a process not just of measurement and keeping track, but a process of deep critical reflection, learning, a mechanism to pull those who have not traditionally had voice into the process of deciding whether this has been a good intervention, whether it should continue, whether it should go on.

So, there's exciting new developments in Indigenous approaches to evaluation, there's exciting new approaches in critical learning and its approaches to evaluation.

And I think all of that faces us when we're evaluating social programs, for sure.

But I think it also comes up here on campus, right? When we're asked to determine whether our programs are preparing students for the work world, or whether our SSHRC grants, sometimes people now have to do evaluations of their research projects, to see if those research projects helped people.

And one kind of analogy that's sort of crystallized this crossroads for me is, think about, you know the Maclean's Magazine university rankings? Right? Kind of an evaluation, you could argue, right? Like, it's an effort to sort of see which programs are effective, and which programs are not.

And you could say, at one level, that's great, right? Increases transparency, parents and high school students use it to make more evidence-based decisions about a program that will meet their needs, and so on.

But at the same time, those of us who work at universities might, I know, sometimes feel like, what's being measured there? And are the right things being measured there? And does the Maclean's university ranking draw us in to a deeper conversation about what university education should be? Or does Maclean's university rankings cause us to shut down, keep our heads down, and try to look good on the indicators so that nothing goes wrong?

And I think that's sort of the crux in some ways, of the inflection point I think we find ourselves on.

And that's what I'd hope to like to talk about today, is how do we, as a university, move things in one direction, in a deeper, more thoughtful understanding of how evaluation can help with change, and perhaps resist that trend towards a more, you know, more control-oriented approach to evaluation.

Liz Jackson:

Great, Mary, would you like to make your offering? Or do you want--

Mary Granskou:

Why don't you go ahead, Lee-Ann?

Lee-Ann Sutherland:

Okay.

Mary Granskou:

Visitors first.

Lee-Ann Sutherland:

Oh, thank you.

Do let me know if you can't hear me, I don't know how well the microphone will pick up my voice.

I must admit, when I first was invited by Mary to participate in this, I thought, oh, okay. Because evaluation isn't, doesn't have a kind of strong critical discourse, or at least not in the world that I work in over in Europe.

But when we got talking about, so, you know, what is evaluation, and what are the key issues here? Then it quickly became apparent that measuring impact was a big part of that. And that is certainly something that is changing a lot, and I've seen it over my 13 years at the James Hutton Institute.

And, so, I'm going to talk a bit about my world at the James Hutton Institute, and how my research is evaluated internally, and then I'm gonna talk a bit about the European Commission and how they evaluate their projects, because that's where a lot of my research is located. And I'm going to talk a very little bit about the UK Research Excellence Framework that the universities have to adhere to.

So, the James Hutton Institute, where I work, is one of Scottish Government's major research providers. But although we have 350 scientists, we're not actually a degree-granting body. I actually have the luxury of doing full-time research. So, we're evaluated separately from the university system.

So, my group, so I'm in the Social, Economic, and Geographical Sciences Group, which is about 10% of the scientists at the Hutton, which is pretty great, it's a critical mass of people who are really interested in doing research that will be helpful to the agricultural sector and in the environment, more broadly, both in Scotland and around the world.

So, every five years we have an evaluation process, and we're actually just going through it right now.

So, on my to-do list, I need to come up with my list of publications, which is pretty standard, so they'll go through and they'll have a look at, you know, are these four star journals or three star journals? Or impact factors, and there's a lot of arguing about whether we should do impact factors or journal rankings by discipline, and I'm not sure what the dynamics are here, but I'm sure there's probably some of the same arguments that go on.

But what I think's particularly important for us today, is that the other piece I need to do is to write up my impact story. And so, what I'm gonna tell you about is this impact story that I need to write.

And what that is, is something that I've done in the last five years, that's had an impact on the people I work with, and so, because I work in agriculture, it's the agricultural sector. And so, what I'm going to write up as my impact story, is my work on Scottish Government's Women in Agriculture taskforce.

And so, how the story goes, is that a few years ago, there was a call come out from Scottish Government, so separate to our core funding from them, which is about 60% of where we get our money, asking for research on women in the agricultural sector.

And I looked at that, and I thought, yeah, that's something that's gonna have impact. And the reason I thought this, is because Scottish Government has a 50/50 by 2020 agenda. And what that means is that they are seeking to get equal gender representation on the boards of all public bodies, including those that are elected.

So, the National Farmers Union of Scotland, which is a different thing from the National Farmers Union here in Ontario, it is actually our mainstream primary agricultural union, has no women on the board, have never had women on the board. So, there's definitely an under-representation going on there.

So, I knew when we took on this piece of research which, frankly, was pretty under-funded in terms of what they were asking us to do, that this was likely to have an impact.

And the interesting thing about it was that we brought in Sally Shortall. So, Professor Shortall is a known gender expert on women in agriculture, but she's done her work primarily in Northern Ireland, and she's recently moved to Newcastle.

And she came on board the research team largely for free, because professors are expensive, and there wasn't a lot of money in the project. And the reason she did that was because she knew it would make a good research case study for impact, for her evaluation within the research evaluation exercise that the UK universities go through.

So, for them, they need to have two impact stories within a five year period. And it actually, the research evaluation exercise, because we're outside of it, I just hear little pieces, but what I understand is that it essentially comes up with a ranking for different departments. And the higher you are ranked, the more money you get from the UK Government.

So, it is critical to universities in the UK that they score highly. And that's not just scientific impact, they have to have this more practitioner impact at the same time.

So, what my story will talk about is not just that I'm on a taskforce, isn't that lovely, but what the taskforce is doing.

So, we're instituting training for women, so, leadership training to try and get them so that they are higher profile, and able then to run successful campaigns, because people aren't appointed to the boards of agricultural organizations. They're elected, and to get elected, you need to have a high profile, you need to run a campaign, you need for people to think that you're a credible candidate.

Nobody wants to be on a board because of who they are or what their background is, they wanna do it on the basis of merit. And clearly we have a lot of women of high merit in Scottish agriculture, we just need them to be perceived that way.

We're also offering some certification, or a charter for agricultural organizations, so, not just farms, but farms are included. Other agricultural organization industries, representative, so that they can look at their institution, and go, how are we doing?

Not just in terms of gender, but a range of other issues. So, how are we handling our maternity leaves? How are we providing education and development? How are we progressing people in their careers? So, not just women, but younger people, employees in the farming operation, for instance.

And we've seen it have some impacts outside of actually what we're doing on the taskforce, in that our National Farmers Union, for instance, has looked at this and realized, the publicity that they're getting on the back of this, and gone, right, we're gonna have a separate survey of our members to see what we can do to try and integrate women.

We're going to change our memberships, so it's not just person-based, it's household-based. So, when they invite people to meetings, for instance, they're not just inviting the one person who's a member, which, frankly, is typically the oldest male in the household.

They're inviting other men, so, younger people, successors, as well as women in the farming operation.

So, this is a fantastic kind of impact story that we get to tell, and in part, it's motivated by us knowing, as scientists, not just that we want to do high-impact things, but that actually, we're being evaluated on it as well.

So, I'm getting close to the end of my time, I'm sure, because I get excited, but I wanna talk a little bit about the European Commission funding.

And I'm, one of my roles here at Guelph is to try and connect Guelph people to the Hutton, but also to UK and Europe more broadly, so if you want to know more about European research funding, do come talk to me afterwards.

But what I'm gonna say now, is that the grading schemes for research proposals have stayed the same. So they're graded out of 15, you get five points for your scientific excellence, you get five points for your impact, which is the kind of stuff I was just talking about, and you get five points for implementation, which is just how feasible it is.

And 10 years ago, when I was starting to write my first proposals, it was really all about the science. And for the impact part, you could get away with, okay, well, we'll have a website, and we'll have a final conference, and maybe we'll have some stakeholder advisory groups, and tick those boxes, and then you're good. And that is no longer good enough.

The European Commission is, instituted a different way of managing these proposals, and a different way of evaluating them. And they've done it largely by integrating stakeholder organizations.

So, when you're forming a consortium, for a lot of the calls, they specifically ask for a multi-actor perspective, which means that you need to integrate, in my case, agricultural organizations, so, farmer organizations, advisory services, but equally, if you're responding to an environmental call, maybe environmental NGOs, that sort of thing, into your actual consortium.

Then the actual proposal is evaluated, not just by scientists, but also by representatives of industry groups.

They've also instituted a process of review during the project. So, it used to be that you wrote your proposal, you wrote your deliverables, and you sent them in, and nobody really looked at them, so you spent all your time on your scientific publications.

That doesn't float anymore, because 18 months in, then you're gonna have an evaluation that looks at your Twitter feed, that looks at your communication strategy, that looks at who's been engaging in your different focus groups. And they will come back to you and say, you know what, actually you need to work on that. Or, actually, that's not good enough.

So, they're enforcing impact in a different way, 'cause you don't get your money for the second round of funding, 'cause they'll split it up, until you've demonstrated that you've met these targets.

So, that's been a massive change in European Commission funding over the last 10 years. And I think, it's been interesting, because your comment I liked, Andrew, about, is it just kind of box-ticking? 'Cause you can still box-tick it.

And I do still get people coming to me, saying, can you please just give me some generic stuff to put in my impact section, so I can get the marks, 'cause I really wanna focus on the science. And it's changing the way that we think, because that's not possible.

You have to develop your impact strategy in line with your science, to think about what makes sense, and who are my stakeholders, and that sort of thing.

So, it has actually changed the way that we do the science. And I think it has actually increased the impact that we're having within the agricultural sector.

Liz Jackson:

Awesome, thank you.

Mary Granskou:

Great, thank you.

So, I'm gonna talk as an observer, rather than as a practitioner, which I mentioned before. And go back to experience that I had inside government, watching the whole focus around the discipline of evaluation, and reviewing of programs, and building in outcomes, and doing that more strategically. And the kind of genesis, the emergence of that. And just comment on where, where I think the field is headed now.

So, I was in the Prime Minister's office in the early 2000s, and what happened then is that health care funding was taking more than 50% of all of government's available funds. So, more than 50 cents on every dollar, every tax dollar, was going to health care.

And we crossed that, and it's climbing now, and the same trend, of course, in the provinces. So, that was really a wake-up call to governments around reduced capacity to support social programs, and all the other priorities across government.

And at the same time, there was an emergence, and, you know, it's interesting how Commonwealth governments look to each other for innovation guidance, you know, what's new, and so, the links to Australia and the UK are very strong.

And there was a brilliant innovator within the cabinet office in Tony Blair's government, that was bringing some really new thinking with new branding around it as well, around how you be more strategic around program design.

Outcomes, review, how you build that in at the front end, and it's not just a, you know, cost-saving exercise, where all the senior deputy ministers get together and they do trade-offs, because that's how it's been done in the past. It's building in strategic evaluation, often done by external experts, into the whole program review process.

So, that was quite some time ago, and then we had the Harper years around accountability, really tightening that up, and strengthening of Treasury Board.

Now, we have a very senior unit, attached right to the Prime Minister's office around strategic evaluation, and, called deliverology. So, it's the mantra of deliverology across the Trudeau government, and they're only beginning, really, to look at, you know, what does that mean across the government?

Now, I'm not an expert in the granting councils, what the trends are happening there. But I just, you know, I look at the field. I look at, for instance, the largest charitable foundations in the world, some of them who I've worked with, and what they're doing around evaluation.

So, I have right here, and I'll pass it around, the 11-page evaluation policy of the Bill and Melinda Gates Foundation. So, they're the largest in the world, they have about \$5 billion a year in charitable giving, for a whole variety of causes, very interesting.

Another one is the Pew Charitable Trusts, and I was a contractor to them for a decade. I've been inside that tent around their approach to impact evaluation, it's extremely rigorous.

So, here's an evaluation brief, oh, I handed out the wrong one. That's the Pew-- Trust Policy note on evaluation to decision makers, and this is the Gates 11-page evaluation policy.

So, there are many others, there's the Hewlett Foundation, they give about 400 million a year, as does Pew.

In Canada, the mantra around being strategic with evaluation, you know, is really alive. The McConnells, the Westons, RBC, et cetera, et cetera.

So, you know, it's very much a trend, and, you know, partly it's about, I mean, the spirit of, we do this session, it's really to talk about, you know, getting ready, what do you do as a university? What do you do as individuals? What are you facing, what are you experiencing?

So, that's really what I have to offer here today, and I also wanted to introduce a video of an interview we did with an Australian consultant working with a very innovative group, called Social Ventures Australia.

They're doing some fascinating work around what they call the ecosystem of evaluation, evaluating the social return on investment, with fascinating metrics, that are actually being, that are very influential within the Australian social financing context. And their focus really is on thriving communities.

But they've done some really groundbreaking work with Indigenous programs in Australia, to the point where now the government has asked them to be engaged in reviewing all of their Indigenous funding, which, I think they have some heartburn about.

But, the fact that they're being invited is very interesting, and they also have many, many investors, so, they've now turned into an investment house for impact investing in community resiliency.

So, I just thought it was interesting to interview Brendan Ferguson, their consultant. Just about what they're experiencing, and it's just more food for thought.

Thank you.

Mary in video:

Speak about Social Ventures Australia, and what is your role there?

Brendan Ferguson in video:

Yeah, you touched on it a little bit in terms of who SVA is and what we do. So, we're a nonprofit organization, and, as you said, Mary, we're working towards an Australia where all people and communities can thrive.

Our role is as an intermediary, so, one of the ways we're able to do that is, typically, by supporting our partners to improve the efficiency or effectiveness of, you know, the for purpose sector.

The functions that we have within our organization are venture philanthropy, impact investing, consulting, policy, and advocacy. So, venture philanthropy is sort of about replicating the venture capital model in a philanthropic context.

We take grant funding and apply that to organizations that we think have potential to scale and achieve better outcomes.

Impact investing, kind of a bunch of ex-bankers doing social finance deals. So, that's more about returnable capital, but we were able to generate both social and financial return.

Consulting, we're management consultants, but working in the nonprofit sector, which informs the work that we do. It's typically into strategy or outcomes management work.

And then we have a policy and advocacy arm, which sort of came along more recently, where we recognized that we, we learned some stuff through our various other functions, and we need to use that to inform our perspective on what works and what should change to improve outcomes across the country.

So, I think 'cause you've said, you know, you asked, what's unique about SVA? I think the collection of those offerings under one roof is probably, certainly unique in Australia, and then we sort of sit at the intersection of government, private funders, and community service organizations. That's what attracted me to SVA.

And, you mentioned that I work in the consulting team, done a little bit of work in the policy and advocacy team, also around thinking through the drivers of better outcomes for Aboriginal and Torres Strait Islander peoples, so that's our First Nations peoples.

Yeah, sure, I mean, you've asked how our evidence-based evaluation drives short and long-term outcomes.

I don't know specifically about the Canadian context, but I suspect that it's similar in that there's an awful lot of things being funded by government in particular, that are not achieving their intended outcomes.

In Australia, we spend about 6 billion a year on Indigenous-specific programs and services, and outcomes really aren't reviewed.

That's a broad statement, but for the most part it holds true. And that's a small cohort of our population as well, we're talking about 700,000 people, or so.

So, I guess, this is simplistic, again, but I draw on the hypothesis that, that speaks to the need for innovation, how do we do things differently? But that innovation needs to be driven by, or informed by evidence of what works.

Otherwise, we're just continuing to spend money and we're not shifting the dial.

So, yeah, we talked a little bit about, already about Indigenous people, Indigenous programs. There's a widespread consensus in Australia that very few programs and services are achieving positive outcomes.

One exception to that is Indigenous Land and Sea Management, where we've had the opportunity to be involved, both with service providers and with governments.

And one of the reasons that those programs are successful is that they connect people back to their country and culture, and so engagement amongst Indigenous people across Australia is extremely strong.

And there's a broader range of community and individual outcomes that are being achieved through that work, and SVA and others have been working over probably the last decade or so, building the

evidence base for the success of those programs. And I think that's now relatively well-accepted in Australia.

We've also seen that Australian experience with Indigenous Land and Sea Management has failed to inform the broader adoption of the Guardian program in Canada, as I understand it.

So, I suppose that's one specific example of a whole lot of work's gone in to trying to understand what outcomes have been achieved, of whether a particular program is successful. And then using that to help to scale that program and achieve more outcomes, for more people across the country.

Okay, and one of the ventures that we've incubated recently, internally, is something called Evidence for Learning, where we're sort of replicating some of the stuff that's going on in the UK, around What Works Network.

So, we're trying, through Evidence for Learning, to build an understanding of the evidence base, and then share and use that evidence.

And, in particular, we're concerned with translating evidence that is being created into a digestible form, so that it can actually be practically used by teachers in the classroom.

So, I think, rather than focusing specifically just on evaluation, that whole evidence ecosystem, the way it works, the way it informs practice, I think is really important.

Evaluation is one element of that, and that sort of typically speaks to, you know, point in time, independent evaluation where an objective party might seek to understand whether a particular program is efficient or effective.

But I also think it's really important for us to be thinking about the way in which service providers, and others within the ecosystem, are collecting the information that they need to prove and improve what they're doing. So, it'll speak to the need for outcomes management, as we often refer to it, by service providers on the ground.

So, I think what I'm trying to say, is that everyone kinda has a role to play in building our understanding of what works, and helping to inform how we spend our money to achieve better outcomes for people.

Liz Jackson:

We have one last contribution from Andrew, and then we're going to open the floor for conversation.

Andrew Taylor:

Great, so I just want to tell a story of a project I've been working on over the last few years, with a group called the Ontario Nonprofit Network. So, they are an umbrella group that does advocacy on behalf of the public benefit sector, or the nonprofit sector.

And a few years ago, they kept asking their members, what are the issues we should be working on? What should we be doing?

And the members kept saying evaluation, you know, we need to be working on evaluation.

And so, we started a project on it where we started exploring, what are the perceptions of evaluation practice among those in the nonprofit sector, and we also talked to government, and we talked to United Ways, and we talked to other funders about it.

And we learned that the practice of evaluation, in principle, everyone agrees that it can be very powerful. That it can lead to a lot of learning. That it's an incredibly useful way of making our practice more evidence-based, more innovative, of moving forward.

But that it often fails to deliver on that promise. And in particular, it fails to deliver on that promise when it gets bound up with accountability, right? Where in order to continue to get your resources, in order to continue to get your support, you have to, or at least the perception is, you know, that you have to look good on your, your impact stories, or your number of publications, or whatever it might be.

And this, I remember one interview in particular, where a nonprofit said to me, our evaluation findings are the offering we put outside the gates of the village for the dragon to eat. So the dragon goes away and doesn't burn down our village, right?

And so, it speaks to how little ownership there was over that process, right? You say you guys want this, for some reason you guys like this crap, so here you go, please go away and leave us alone kind of thing.

And we did a bit of a lit review on the factors that make evaluation meaningful and useful, and interestingly, they have very little to do with how big the sample is, how fancy the methodology is, whether it's randomized, whether or not it's controlled.

The things that predict the usefulness of evaluation are buy-in, are clarity of purpose, are environment of trust, are ongoing communication between the stakeholders that are involved, and so on.

And so, we started talking about what could we do in our project to try to address that?

And in a way, I think part of what happens, and I'm interested to ask my fellow panelists about this, 'cause they both told stories of evaluations really working well, and to what degree they would say that it was those relationship factors, those interpersonal factors, trust, communication, and so on, that really greased the wheels and made it work.

Because I think we, all of us, especially those of us who've grown up in a kind of Western European tradition, have this tendency to intellectualize, right? This tendency to focus on the ideas on the page and the bullet points, and treat things like machines. And so we do evaluation in that way.

And, you know, with the sort of perverse situation, where funders are asking nonprofits for this evaluation, the nonprofits don't find it terribly useful, but they send it in, and then the funders don't find it terribly useful either, it's kind of a half-assed system that doesn't really do anything good for anybody, but we all keep doing more and more of it every year.

And I'm reminded of that old quotation around, you know, an accumulation of facts is no more a science than a heap of stones is a house. You know, we can put more stones on the pile, more data on the pile, and it's not turning into evidence or insight.

And I think the bottom line for me is, and I suspect it's probably true in these stories we've heard, and it's certainly true in my story, is that we can't let the learning, you know, the culture of learning and insight and action be accidental. I think we have to design for it.

We have evaluation systems that are explicitly set up to ensure that there is learning.

And the one way that we've sometimes talked about it is, let's not talk about measurement first, and then once the, and this is the one sort of nit I might pick with your colleague from Australia, is he talked about, once we've got evidence, then we can take action.

And I think what I've been learning is, until we have trust and clarity and shared purpose, there's not a whole lot of point in gathering evidence. Right, that in some ways that sense of actionability, that sense of, right, stakeholder buy-in has to come before the gathering of data.

And I'm interested to know if that's true, 'cause I think, you know, as sort of a, you're sort of a recipient of an evaluation, Lee-Ann, right?

You're being asked to share this data. But I think it's data you more or less see as meaningful and relevant, and appropriate to the work that you do, right?

It's not something imposed on you from the outside, it's sort of--

Lee-Ann Sutherland:

No, because we've written the proposal, so we've already identified what it is we think would be useful indicators.

Andrew Taylor:

Right.

Lee-Ann Sutherland:

And so, if you do it properly, then you think through, on the basis of what we're proposing to do, how can we ensure that it has an impact? Or how can we ensure the stakeholders are involved in that? And then we report back on what we propose to do.

I mean, obviously we do still have time to sit and think, well, you know, what do I have to do to tick this box? And so they will just sometimes take what somebody else has come up with, and gone by, oh we must, we must need a website, and we must need an additional stakeholder consultative group.

And we must, and then how much lip service it is to actually, you know, we can report that we've had these meetings, and we can report minutes, and we can even report outcomes, but are the outcomes from the meeting? Or are they what the scientists wanted to do anyway, and managed to, you know, to talk to the stakeholders about it.

And then kind of rubber stamp, so. And it's interesting when you're talking about this kind of learning process, because I think, certainly the European approach has really changed how scientists come at it, but I'm not entirely convinced that it's helping Europe learn how to run better projects, or how to manage projects better.

So, I wouldn't say that it's, and we did begin a fairly positive picture of it, and certainly, 10 years ago, we were putting our deliverables on the shelf and nobody was paying any attention, and that has changed, and that is great.

But I don't think we're there yet. In terms of what you're talking about. Because there's no, yes you won't get your money, but you can apply for the next project, without any insight from whether your previous one was successful or had impact or didn't.

Andrew Taylor:

So you don't know what happens to these impact stories when you send them off to government? Like, you don't know what government does with them?

Lee-Ann Sutherland:

I think they just use them to hang on their walls as nice pictures, or, to put in the newspapers, things that we've done, or—

Liz Jackson:

So you're interior decorators slash PR.

Lee-Ann Sutherland:

Yeah, yeah. Posters on the wall.

Liz Jackson:

Nice.

Lee-Ann Sutherland:

Yeah. So, it's facetious, but I don't think, it may affect the next funding program.

Or our current funding for Scottish Government, for instance, is a five year program, but what really matters is your midterm review. Because they've already committed to the next five year program, long before you finish the first one. So, the midterm review is actually much more important than the final review.

Liz Jackson:

Andrew, did you have closing comments?

Andrew Taylor:

No, I'm good.

Liz Jackson:

Okay. I like a panel that runs itself. I feel like I'm just gonna be, like, the weird table at the wedding where no-one's really sure why that person's there.

So, I circulated in advance of this discussion a series of questions, some of which I think all of you have already touched upon in your presentations, so I'm not gonna belabor it. If I may, I'd like to ask one question to the panel, and then turn to the room, are you waiting to ask questions at this point?

Kate is. Okay, so I just wanted to ask the last question that I prepared, trying to bring together all these worlds of thinking, and approaches, into the kind of university environment where a lot of us are employed and studying.

So, I'm really curious to hear a little bit more about the role of community in the models of evaluation that you have witnessed as most impactful.

So, conventional scholarly models certainly position researchers as experts and communities as places of need, right? Or instructors as experts and students as these voids in need of filling up with expertise.

So, I'm not hearing that in your presentations, but I'm very interested to hear about ways in which you have worked, or witnessed others working, to work against those kind of harmful and wrong-headed assumptions, in terms of building evaluation practices that work as knowledge sharing, and to level out authority and power.

Anyone wanna take that one?

Mary Granskou:

I'll come in on a practice that I wouldn't suggest.

Back to your trust question, is, you know, I was engaged in a multi-year, multi-million dollar initiative around land conservation in Canada, involving many, many, many people.

And the funders brought in an independent evaluator to evaluate the program, which was never shared with us.

So back to your question around trust, all we heard was a one-liner, that it was great. You know? Back to your comment on trust, is that having transparency around results I think is pretty fundamental.

Lee-Ann Sutherland:

I just find it really interesting, what you said about the funder, 'cause kind of the elephant in the room is, who gets funding and who doesn't, for these--

Andrew Taylor:

Yeah.

Lee-Ann Sutherland:

Research projects, and even though we're involving stakeholders in our consortiums, and so therefore they have a budget, they will be the only team in that country that has the budget, so when they're trying to then engage their peers in what's going on, they have a budget and the control, and ultimately they're responsible for reporting.

So, it's really hard to try and, to try and pass too much responsibility to people who aren't being paid, when you are actually being paid to do the work. And so there's that whole kind of dynamic, that's really tricky to work with.

And the European Commission quite understandably doesn't want us paying people over whom they have no control to work on the project, so by definition they become kind of volunteers.

Liz Jackson:

Andrew, did you wanna--

Andrew Taylor:

Building on that, in terms of, what's a model of evaluation practice, to your original question that, that mindfully brings in voice.

One little example I like, and it's a local example, but I think it illustrates a really important principle, is there's an entity in Guelph, called the Guelph Neighborhood Support Coalition, that came to be because funders in town, the United Way and the city, principally, realized that their approach to giving funding for neighborhood work in town was a little ad hoc.

Like, one neighborhood would get recreation money, another one would get money for a community center, and it wasn't very fair.

And so, what they did is they created this arms-length entity, which is an independent nonprofit organization with a board of directors, and the members of the board are, at least last time I checked, half of them were representatives of neighborhood associations, and half of them were representatives of important funders and large nonprofit organizations in town, like public health and folks like that.

And the whole idea is that that independent entity is the one trying to bring together a thoughtful, critical approach to evaluation of what's going on in neighborhood groups.

And the funders are simply members of it. Like, they aren't calling the shots, they aren't requiring it, they aren't doing it.

They're bringing money to the table, and certainly they want to invest their money in an evidence-based way. But they don't have control over the evaluation process. It is an independent process.

And I like that model, and I think, I mean, it's got, it's challenging to run, and it's got a lot of cooks in the kitchen, and you can imagine it's not the easiest thing in the world, but there's a principle there about divorcing the process of learning and critical understanding from the process of giving out money, and making it and the process more participatory, to your question, Liz, right?

Making it more, it's a multi-stakeholder group deciding on the questions that we are asking. So, yeah.

Liz Jackson:

Which then opens up the parameters of what is seen as worthy evidence, right?

Andrew Taylor:

Yes, yeah.

Liz Jackson:

As worthy knowledge to inform programming.

It's interesting how often in each of your presentations, money came up, right?

So, evaluation is, it's the distinction you noted at the start, I guess, Andrew, you know, evaluation's seen as a box to tick, or a system, like an annoying hurdle you have to keep jumping in order to get the resourcing you need. Which is true, like it's genuinely true in a lot of the contexts that I've written grants.

But then also, evaluation is an opportunity to help people to better understand themselves and the work that they're doing, right?

I think that's enough out of me, would anyone like to ask a question? We have a mic here, this is being recorded, so, if you have a question, please ask for the mic or go to the mic, and feel free to jump in.

Go ahead, are you okay to go to the, do you wanna go first?

Questioner #2:

You go ahead. Yeah, I can follow her.

Questioner #1:

I think that Liz has sort of already half-asked my question, because I think something that keeps recurring for me in your comments is that there's an inherent power dynamic here, that people are being asked to do evaluations in order to gain access to resources, or because regulatory authorities are asking them to do so. And that's kind of the, it's the elephant, or the dragon in the room I guess, right?

And so, when we think about truly grassroots or community-oriented evaluation, I think I'd like, similarly, to ask, how can we do that, you know, even just thinking about the video, about working with our Indigenous people, and saying, well, what if the Indigenous people themselves were doing the evaluation, even if it were a funder, for example, who was receiving that evaluation.

I'm curious to hear about your thoughts on that kind of decolonized or perhaps deregulated evaluation model.

Andrew Taylor:

Just as a quick little resource that I love, the Ontario Association of Indigenous Friendship Centres has an excellent resource guide for Indigenous communities on how to negotiate with researchers, and when to say yes, and when to say no about getting involved with research projects, which I often use, and I think that's kind of what you're talking about.

But given where we sit today, the other thing I think is, I think universities have a huge role to play in sort of being a counterbalance power-wise, to say, no, no, no, like, there's a way to do this evaluation stuff, guys. And if we're gonna do it, we're gonna do it right. And not allow this kind of power move to happen, and it's such an easy way.

And I think we can do that, right? 'Cause we have that credibility, and that deep knowledge of critical approaches to research.

Liz Jackson:

There are also, I'm now a panelist, 'cause I thought that was such a good question. I'll take only one minute.

There are also, I think, ways of doing both of the things. So, like, we're all kind of bridges here, right? As scholars or students or practitioners who want to do good in the world.

We know that we have to work within the institutional parameters that dictate the terms of our existence here.

We also know that those parameters are inherently exclusionary, or damaging, or silencing to vast swaths of humanity, right? I think that's pretty generally accepted, anyway, I feel that way.

So, what we have to figure out to do is how to function within a system that can enable good without allowing it to hinder our broader and better urges.

So, one tiny example, and then I'll be a moderator again. But, in my previous role I did a lot of arts-based work, and one of our partnerships was with a group that provides services to children and youth living with various levels of physical and mental ability. So, they would do these music-based workshops.

Our research interest was in the impact of musical participation on people's confidence, social cohesion, you know, sense of community belonging, and so on, their interest was not in that at all.

So, I found myself trying to evaluate the program, the first year that I supported it, and the kids were like, I don't care what you're asking me. That is not, I wanna talk about that really loud drum. I wanna talk about how I already knew how to play piano, and you thought I didn't, right?

So, they had like, they were their own musician, thinker, practitioners, and I had forgotten for some reason, that of course they should help shape the questions, right? Like, I mean, I knew it, but I didn't do it.

So, from then on, what we did was, we would have a huddle at the beginning, and partway through, and then at the end. And I'd say, listen, part of my job is to talk about what impacts we've generated here, what you've learned and not learned, how we did as facilitators, what do you want to learn this time?

And so, we would kind of co-produce, and this is very small and therefore possible, right? And the funders had already given us the money, it was SSHRC, so, they weren't watching us closely, so it was a different power relationship.

But we had a fantastic time, so every time we'd gather the data we needed, and we would tell the participants what they had asked us to find out for them. And it was really amazing.

And we did that via film, because a lot of them had different levels of verbal ability and so on, so they would pick their mode of expression, pick their topics together, and it was, not radical, but a small glimmer, you know.

It was a little taste of how you could kind of bottom-up it.

Mary Granskou:

If I can take just a minute on the Indigenous question.

So, I can't answer directly, Jessica, you might be able to on Social Ventures Australia, but I'll tell you what I do know.

That they are a partner in many Indigenous community initiatives over a long period of time, very familiar with the concepts and best practices around consent, and engaging in that kind of way, as a partner.

The reports they produce are really interesting around qualitative outcomes, and, actually, stories to reflect those outcomes, which, really interesting and thoughtful work that I know all the colleagues that

I've worked with here in Canada on similar Indigenous-led initiatives are impressed by, and in fact, I know Indigenous clients who have hired them to do similar work here in Canada. So, I guess they pass that test, at any rate.

On their methodology, I can't say much more, I dunno if you can.

Jessica:

I mean, there are some critiques of their methodology.

Mary Granskou:

Yeah.

Jessica:

And it's an evolving thing.

Mary Granskou:

Yeah, yeah.

Jessica:

I think that, yeah, social return on investment, there definitely are some critiques, and there's, we're looking at ways of giving, you know, it up, and put more power in the communities that they're working with.

But I think it's really about, yeah, talking to the community partners first, and making sure, from the very outset, that you're negotiating, okay, what are your needs? What do you want to see from this process? From the very beginning, and making sure that you're not coming in with your own research objectives, necessarily, or at least that they're flexible and adaptable to change.

Mary Granskou:

Well, in fact they're quite open about the critique around SROI themselves, and where they take it.

Jessica:

Yeah, I mean, he mentioned it in the interview a couple of times, yeah.

So it's, because it's something that I'm considering to use as my own methodology for my research, and he was open to further discussing some of the critiques that are ongoing with SROI, but mainly that you're taking a very Western worldview and applying it in a context that does not necessarily embody that Western worldview, right?

Mary Granskou:

Yeah, great point, so. Thank you.

Lee-Ann Sutherland:

I'm thinking a couple of things, as I kind of have listened to this. And one of them's coming from, 'cause I think there's been some really interesting things here said about what you can do, and what's possible, and the great things that we could do in evaluation going forward.

And then, I'm also, at the same time, thinking about the kind of multidisciplinary context in which I work, in which social scientists are quite often brought on to the research team, in part, to do the communications, or to do the impact bit, because you know how to do that kind of stuff.

And so, they'll quite often have gone and done their research, and then they want you to come in, and, please help us convince farmers to adopt this vaccine that they never wanted in the first place, kind of stuff.

And so, what I'm wanting to say here is that there's, it's partly a cultural thing, and so I think that as social scientists, we tend to have a culture of appreciating evaluation and thinking we can do this better, and needing to have this kind of parity between the different actors.

But there's also a range of disciplines out there, and I'm probably doing them an injustice, because it's not that all natural scientists are like this, it's just that they don't tend to get trained in qualitative research methods and stakeholder interaction, and that sort of thing, to the degree that we do, because we have to when we collect our data.

And so, my caution is that if you do give us this greater freedom to do evaluation, I suspect that there will be some people that will go and do fantastic, exciting evaluation things, but there will also be a cohort of scientists who will go, right, freedom, well, let's just spend 10 minutes on this and then move on to what we really wanna do.

So, I think, you know, with greater freedom comes greater responsibility, and so, there is a reason that we have some of these kind of checks and balances in place.

Liz Jackson:

We have about five minutes left, does anyone else have a question, comment?

Questioner #2:

It's only five minutes, now?

Liz Jackson:

Yep.

Questioner #2:

Actually, I hope I will be quick, and I'm a little bit, talk about the program, Mary talk about the eminent program, which is, I do research.

And a few years back, and I was in a workshop, and a government person approached me, say, oh, will you come and you invest on Lake Simcoe, and you know, funding, and we need to get an evaluation report. Do you have any data, say, oh, I did plant how many trees, and some other things, and what the effects are.

I said, I do have some data, but I'm not going to give to you. The reason is very simple, my reason is very specific, and do you guys work, and we did some for, I said, you guys program's five years, so why didn't you engage me five years ago?

And they say, oh, we did not think about that, or something like that.

Anyway, they're getting things done. My question, basically, is two things.

One is that, for the program evaluation or some social program, and, are there any way, and I guess it's difficult to engage this evaluation from the beginning, at outset, so how many things which we are doing.

Second thing, and Lee-Ann mentioned a very good point, is that, and all this evaluation, yes, has a framework, and probably the social scientist and scientist all together got a quality and quantity of things, and it is not just for evaluation's sake, and it maybe have lots of science, social science innovation or something, can be that, so, sorry, I'll just quit, thanks.

Liz Jackson:

Anyone wanna take part one or two of that question?

Andrew Taylor:

What can we do to get it at the beginning?

To be fair, I think federal governments here in Canada, and I think funders more generally, I think are quite good at the beginning of a funding relationship of raising the question, and saying, look, hey, evaluation's gotta be part of this, we wanna know your strategy.

So, I think it is getting talked about at the early stages, but sometimes, and I don't know in these particular cases, but in my experience, sometimes the nature of that conversation at the beginning is, what's the outcome you're gonna achieve and how are you gonna measure it?

And that's as far as it goes, and I think part of what we've been recommending in our practices, we also need to know, why are you asking those things? What are you gonna do differently once you have the answers to them? How are they gonna help us, as a funder, do things differently? And let us tell you why we're doing this project and what we hope to learn from it.

I remember working with one granter that had, over the last several years, given out five grants to five different nonprofits, who were all trying to work in schools.

Every one of their evaluation reports came back saying, you know what, it's harder to get into schools than we thought it was gonna be, and it took us a long time.

And yet, that granter was sitting there with those five evaluation reports somewhere in a file, and still giving out grants to more nonprofits to do the same thing, like they hadn't learned it, right? They hadn't said, you should stop doing that, guys. Or, if you're gonna give money, you should be giving it to groups that have done the infrastructure to get into schools.

And so, I think the conversations at the beginning of the relationship need to go deeper into the learning and the action, and not just stop at the measurement.

Mary Granskou:

And, one thing I'll say is that, I guess in my experience, there's really two kinds of funders.

There's funders who are partners, who are interested in a collective learning as partners, and supporting that, which also means learning from your mistakes collectively. Challenges, successes.

And then there's funders where there's a power differential, which we've referred to, where it's, there's only room for perfect execution of planned activities, programs, and initiatives, and not that spirit of collective learning in the room.

And so, they're different. And kind of wearing a different lens, knowing what kind of funder you're working with, navigating through that. Because they're different, and the outcomes are applied differently, at least in my experience, yeah.

Liz Jackson:

So, Mary has brought us to the close of our official time together.

So, I want to thank the panelists for your brilliant contributions. It was very easy to moderate you, 'cause you didn't need me. So, that was perfect for me.

Thanks to everyone for coming, and please do help yourselves to snacks and refreshments before you go.

Byron's put on a beautiful spread, so, eat it up.

Byron Sheldrick:

Please eat them.

Liz Jackson:

Yep. All right.

Andrew Taylor:

Thanks everybody.

[End of transcript]