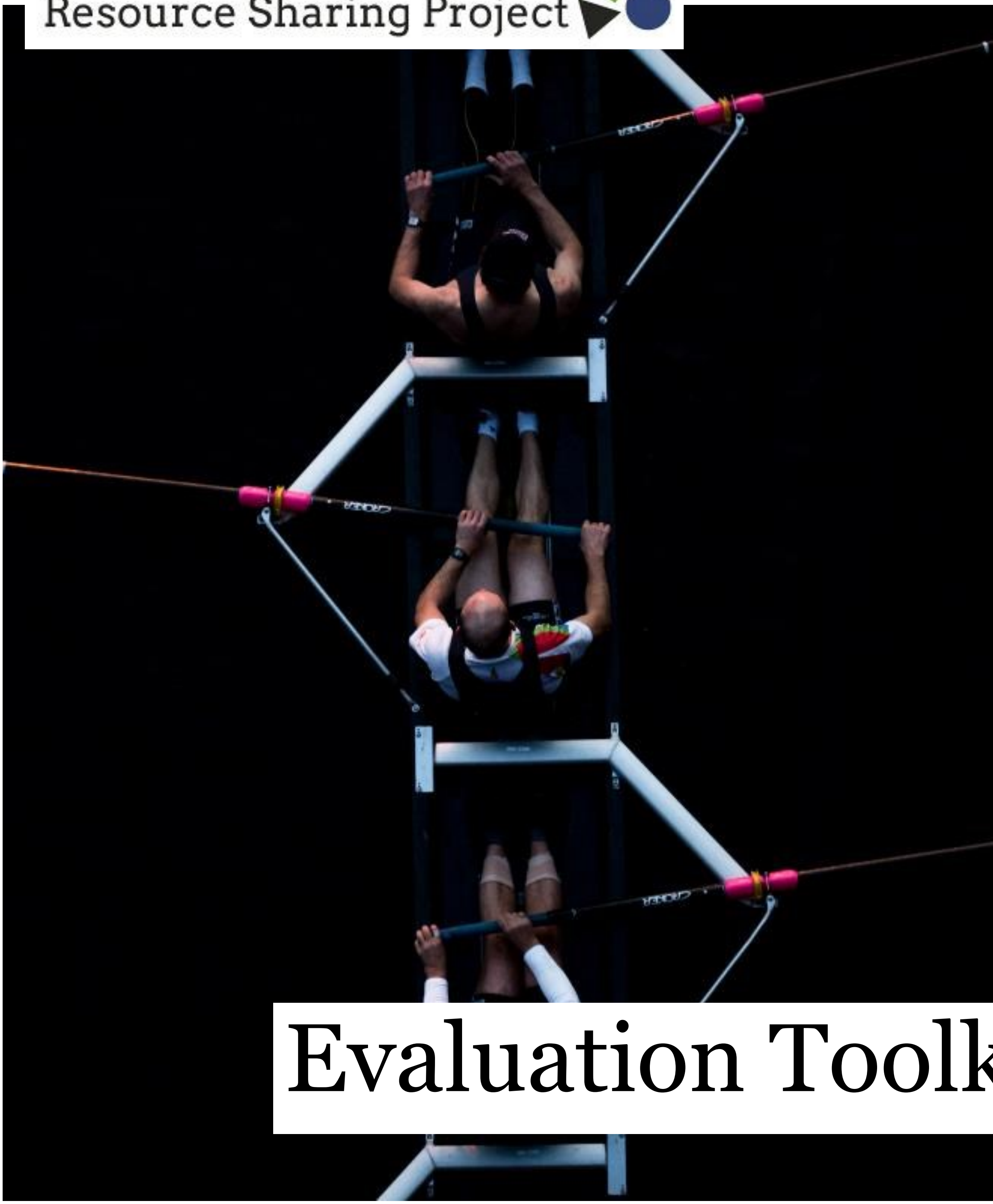
NATIONAL SEXUAL ASSAULT COALITION
Resource Sharing Project



Evaluation Toolkit

MODULE SIX

Tools for Shared Learning

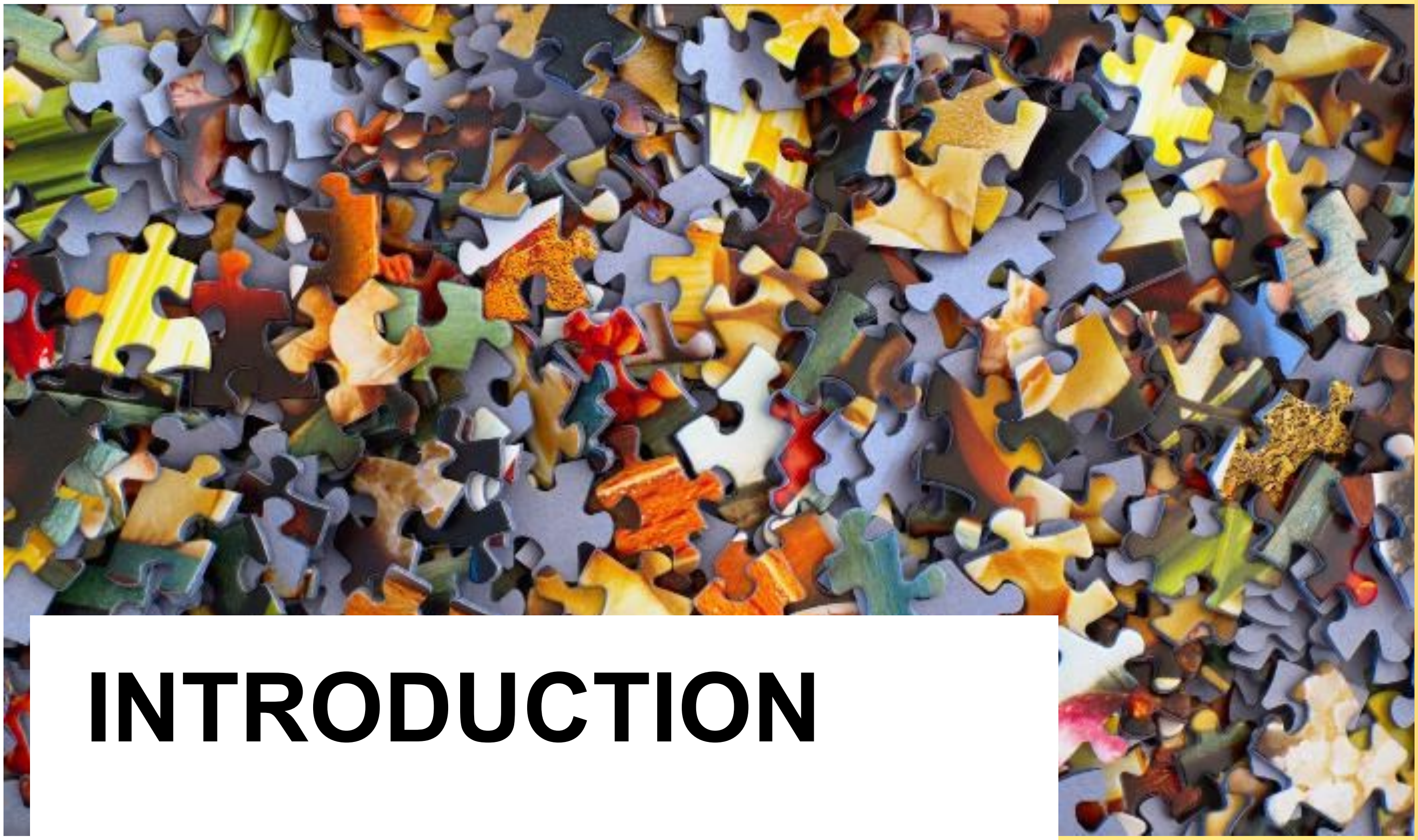
Resource Sharing Project

Evaluation Toolkit

Module Six: Tools for Shared Learning

Written by: Laura Pinsoneault, Spark Policy Institute, and members of the Resource Sharing Project Staff

TABLE OF CONTENTS



INTRODUCTION

The earlier modules of this toolkit focused mostly on how to design evaluation to understand and learn about how TA is delivered and what kinds of results we see from it. However, a lot of our TA work is intended to solve problems in a bigger way, by shifting mindsets and the way people work together, in order to make lasting changes that end sexual violence. This type of change is referred to as 'systems change'.

Module 6 provides a brief overview of systems change thinking and some tools that we can put in place to help us think about how to produce systems-level change and identify where we are having systems-level impact. These tools also help us track what we are learning, and how to adapt our work in real time to better meet the needs of survivors.

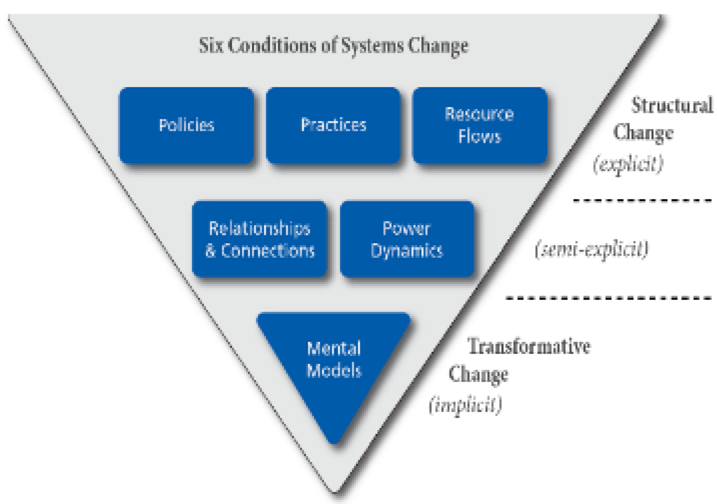
UNDERSTANDING SYSTEMS CHANGE

A system is the coming together of several related and interdependent components acting towards an overall goal or purpose. Systems are everywhere and many individual systems interact with other systems. For example, RSP is a system made up of several coalitions that all interact with different programs and communities.

What defines a system are the many different perspectives within it, each of which may view problems and solutions in very different ways. When we provide TA, we are working to shift conditions within a system or set of systems to ensure that all systems that surround a survivor are prepared and ready to promote healing and support.

To change deeply entrenched systems, like those that surround sexual violence and rape, we need to first understand the conditions that hold the problem in place. Then we can think about how to shift those conditions to create change. There are three levels of where shifts in systems may need to occur[1]:

FSG's visualization of the levels of Systems Change



Explicit Structural conditions include things like policies, practices and resource flows. When we influence structural shifts, we can usually name those changes explicitly and document them through evaluation. Changes at these levels can have powerful effects on sexual violence and healing. For example, the creation of the Sexual Assault Services Program (SASP) expanded the funds available to coalitions and local programs to serve a wider diversity of survivors. This is structural change that had wide-reaching effects across the system of sexual assault services.

Semi-explicit Changes at this level are important catalysts for sustainable change. It includes how changes in relationships, connections between relationships, and the distribution of power and decision-making authority get made. There are tools that can help map relationships and power so that we can document our influence over these changes over time. For example, we may direct resource to on-going relationship development within the court system in order to ensure that survivors are protected during the judiciary process or staff turnover.

Implicit Transformational changes are not readily seen because they refer to shifts in mental models—the deeply held beliefs that influence the way people think, act and communicate. Measuring change at this level requires capturing those "Ah-ha" moments that we have all experienced and want to hold on to but don't quite know how to document. This is where narrative and storytelling approaches to evaluation (that we reviewed in Module 4) are particularly power tools.

For example, a transformational change in our work may include working with communities for many months or even years to help them see the range of experiences of people in their communities that influence how they respond to

1 John Kania, Mark Kramer, & Peter Senge (June 2018). The Water of Systems Change. Available on-line at https://www.fsg.org/publications/water_of_systems_change

sexual violence. In our first few interactions, we may hear things like, "Those things don't happen often in our community, it isn't worth investing a lot of resources." Over time, the conversation may shift to, "There seem to be neighborhoods within our community where we need some programs" to finally, "Sexual violence can happen to anyone and no two people experience it the same, how do we develop resources to provide for these unique needs."

In this toolkit, we offer some tools to help identify which conditions we can influence the most at any point in time, develop strategies and activities to influence those shifts, and determine whether those strategies are generating the necessary shifts.

The Stakeholder Engagement Wheel tool from Tamarack Institute can be helpful in engaging multiple perspectives and informers of the evaluation in how to disseminate and use findings.

A resource developed by the RSP Evaluation Workgroup provides additional information on the intended and unintended consequences of evaluation.

LEARNING FRAMEWORKS FOR SYSTEMS CHANGE

Understanding the conditions that need to shift only gets us part of the way to systems change. We also need to learn how to make systems change happen and build habits of using information or data to inform how we create systems change. There are several frameworks that help guide us in designing initiatives and evaluating impact at a systems level. We provide five approaches here, but there are many more.

The Systems Change Sandbox

Spark Policy Institute created the Systems Change Sandbox to help initiatives identify and understand the types of changes that might be possible and meaningful within and across the systems they are working in. The tool also helps track the process of systems change over time.

Because systems change is rarely a single effort, the Systems Change Sandbox is designed to look at four quadrants of change:

1. Informal changes that happen within an organization or group of organizations operating in the same system (i.e. coalitions or programs). These changes include things like:

- Adopting a new program or adapting an existing one
- Using new data to improve a program or service
- Increasing collaboration to solve a problem

2. Informal changes can also happen across organizations or systems that aren't focused on our goals and could include things like:

- Sharing of resources about sexual violence or healing with another organization
- Providing space for or participating in an event not focused on sexual violence or healing but where that information might be needed
- Showing up to celebrate the community or organization

3. Formal changes (the more explicit part of systems change) focus on the policies, practices and infrastructure needed to create a new way of eliminating sexual violence and supporting the healing of survivors within our own system. This includes things like:

- Improving information flow in the community so that support is easier to access
- Establishing standards around anti-oppression curriculum across coalitions
- Agreeing to collect the same data

4. Finally, there are explicit formal changes that need to occur across systems. These are often the hardest changes to make but when effective are truly transformative. These might include:

- Positioning of coalition expertise formally within the justice system
- Formalizing trauma-informed curriculum in schools
- Advancing local, state or federal policy to strengthen economic supports for women

The Systems Change Sandbox can be used at different stages of work, including our cumulative TA and support efforts, to plan for and capture the changes we are making happen. The tool can be used within a planning team or with a larger set of partners to create a shared understanding of what we want to achieve together, recognize the iterative and long-term trajectory of our work, and celebrate the systems change process as it unfolds.

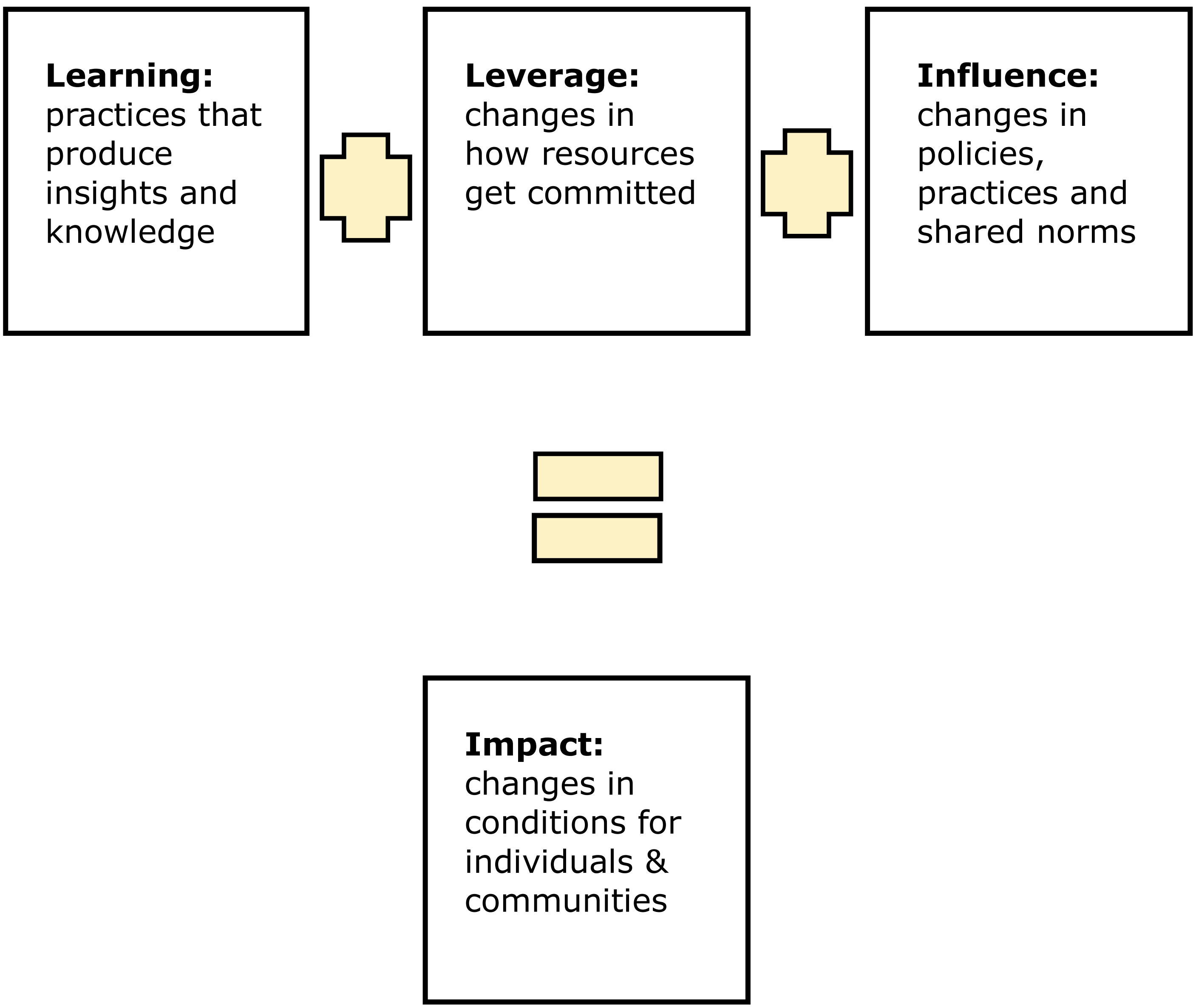
I2L2: Impact = Influence + Leverage + Learning

The I2L2 framework was created by Jane Resiman, Anne Gienapp, and Tom Kelly through ORS Impact to help organizations understand the difference that they are making at a systems level. What makes the I2L2 framework different than other frameworks is that it positions learning practices and systems changes as critical to producing sustainable impacts. This type of thinking is critically important in the type of work that we do because we often don't get to see the full impact of our work in any type of immediate time frame.

I2L2 is a framework that helps measure progress towards systems change. The working paper from ORS describes different outcomes we want to look for (Learning, Leverage and Influence), and ways to measure progress towards each. So, this framework is most relevant when:

- What we want to understand is change at higher level (TA as part of our larger strategy)
- We are working to achieve systems change
- There is willingness to change or adapt our strategy or approach
- Qualitative data is respected and valued
- We can focus on both efficiency and effectiveness of our TA

For example, in the case of TA, using the I2L2 framework would help us measure and understand emergent learning.


Learning: practices that produce insights and knowledge
Leverage: changes in how resources get committed
Influence: changes in policies, practices and shared norms
Impact: changes in conditions for individuals & communities

Emergent Learning

Emergent Learning is a package of tools that provides space for developing more effective approaches by facilitating purposeful reflection on experience, the current context, and the desired outcomes of the work. It provides a steady process for building insights over time and creating a track record of what works, while also helping to understand how our work can improve. Emergent Learning can support coalition-wide sharing of information by using experience of implementing TA to identify trouble spots and plan for corrections. Emergent learning is highly respectful of the perspectives and experiences of individuals and groups often left out of the design process, making it a great fit for our values and principles.

Learning: what it would take to build awareness around the root cause of sexual violence in rural America

+

Leverage: Document the changes in how money and staffing get directed towards these strategies

+

Influence: Document the ways in which rural communities are now talking about sexual violence aligned with our policy goals

=

Impact: changes in conditions identified in our root cause analysis (i.e. changes in behaviors, true incidence, etc)

Fourth Quadrant Partners are the leaders in Emergent Learning concepts and tools. Later in this module we provide more information on two of the key tools in the Emergent Learning toolbox. The tools are most useful if they are used from beginning (designing TA and support systems).

Introduction to Emergent Learning CFED Assets Learning Conference is a presentation by Fourth Quadrant that can help explain how to best set up emergent learning opportunities.

Before Action Reviews (BAR) and After Action Reviews (AAR)

A couple tools within an emergent learning toolkit, the BAR and AAR, are simple and easy-to-use tools. When we make it a habit to use these tools, we will likely do TA better, from our perspective and others.

BARs and AARs are culturally adaptable and highly participatory. As such, they can be adapted in ways that reflect our values and principles. When facilitated well, these tools are a great way to value all experiences and expertise. As a result, people participating in BARs and AARs are given the opportunity to voice and hear from diverse perspectives and see how they contribute to finding the best possible solutions.

BARs and AARs are good for leadership, learning, supervision, coaching, and building knowledge and skills. We can choose to use a BAR or an AAR when we are trying to:

- Help individuals and groups focus less on what they are going to do and more on what result they are seeking
- Learn from experience and expertise
- Prepare or plan for what challenges could come up that will impact the result
- Build knowledge that we can use and apply in the future

Rethink Health Ventures produced a toolkit on how to build learning practice through the use of the BAR and AAR along with a template for documenting the process.

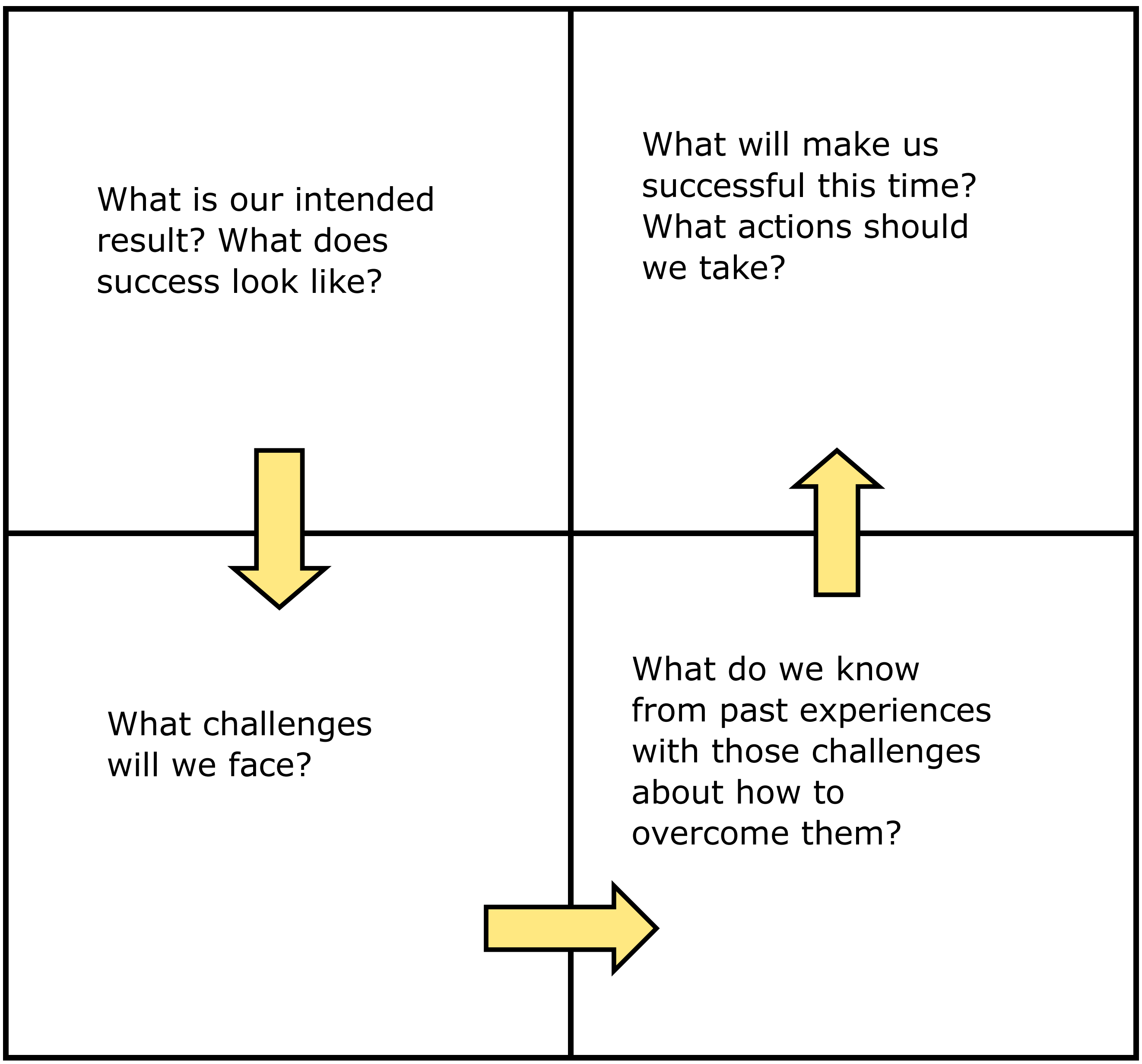
Before Action Review (BAR) for Learning About TA

For TA, we can use the BAR in two ways. First, we can use it internally to plan for how we might deliver a TA activity or event. Secondly, we can use it as an evaluation tool at the start of TA with programs to understand what everyone knows about the problem, what they expect or hope to get out of the TA, and what would meet those expectations. Repeated use of the BAR method allows us to build on what we learn in real time.

A BAR can be done alone or with other people and within teams. The goal is to gather the insights of those with the most direct interest in what it is we are trying to do. A typical BAR for more intensive or larger projects takes about two hours and requires good facilitation skills to keep the group focused. However, a BAR can be used in any size project or activity, including preparing for a tough conversation or meeting.

To implement a BAR, we need a "framing question" to help guide thinking. The framing question is proposed by the facilitator but refined by the people informing the BAR. For example, a framing question might be: *What will it take to meaningfully and respectfully engage New Program XYZ in our TA learning track?*

BAR Process



What is our intended result? What does success look like?
What will make us successful this time? What actions should we take?
What challenges will we face?
What do we know from past experiences with those challenges about how to overcome them?

BARs can be conducted in person using a white board or flip chart paper to document what is said, or virtually, if there is technology in place that allows everyone to see what was shared by others along the way. A BAR generates immediate actions steps so there is no additional interpretation needed for the tool. After the BAR is completed, a short memo can be prepared to document what actions steps need to be taken and how to get there.

It is important to note that BARs are about getting to action. Do not cling too tightly to finding the ‘perfect” answer to the above questions. This can lead to ‘analysis paralysis’ or inaction. Rather, see the exercise as a tool to gather important perspectives and end with concrete action steps we can take to move forward. Then act on them and conduct an After-Action Review (AAR) described on the next page to determine how to improve on those actions the next time around.

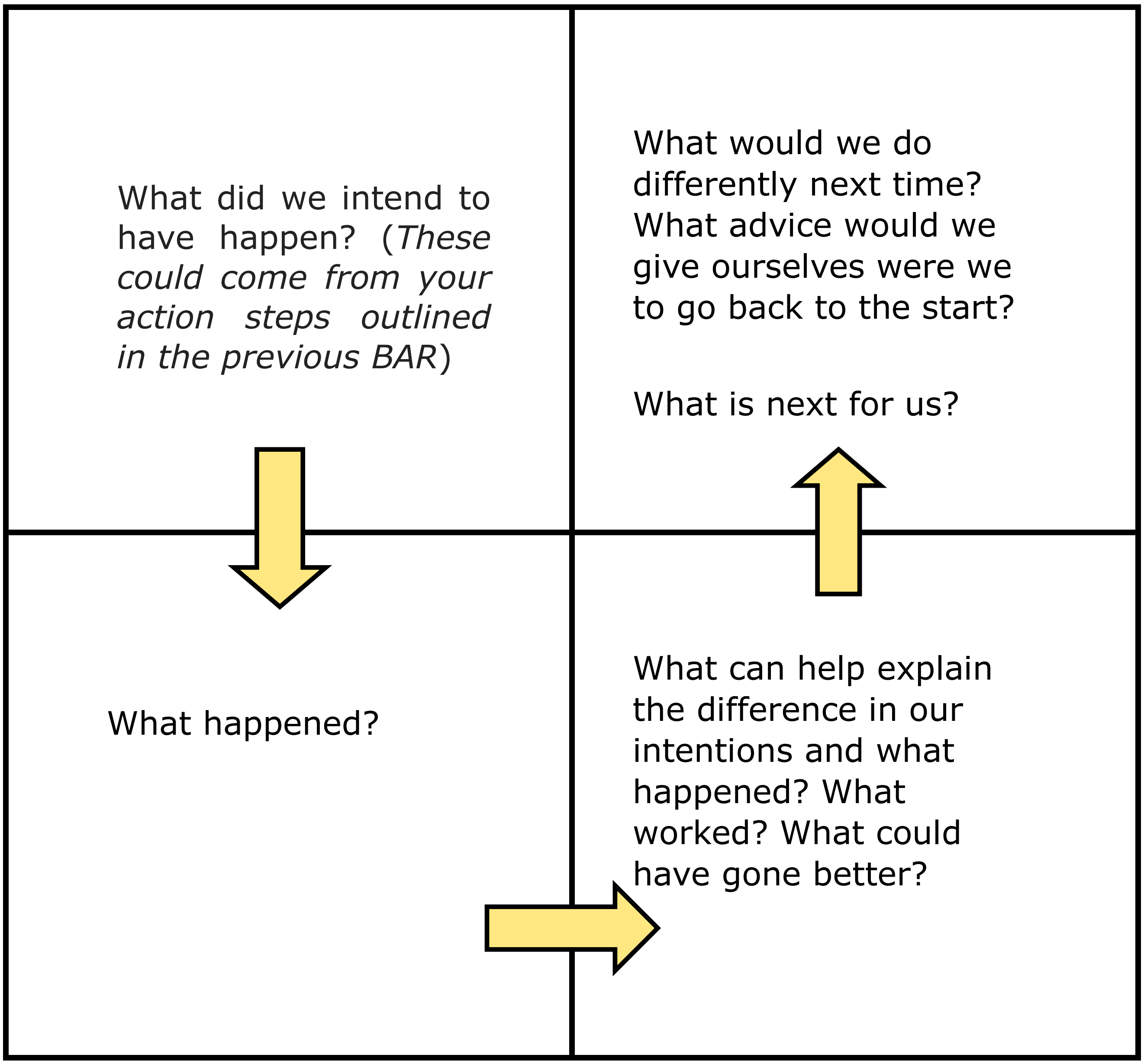
After Action Review (AAR) for Learning About TA

The AAR is like a BAR but is used after an activity or project is underway. Through an AAR we can look openly and honestly at where we achieved the results we hoped for and where we did not. The AAR can also help uncover implicit assumptions that influenced the results and build trust between individuals and groups to overcome fear of judgement and mistakes.

In emergent learning, cycles of BARs and AARs are done repeatedly to continuously learn from the reflection exercises. Still, an AAR can be done even when a BAR was not conducted and is a good reflective tool. When an AAR is used after a BAR (for example, 6 months into the project), it can be used to check assumptions and trace what outcomes were achieved and what led to those outcomes. This learning can be part of building an evidence base for a TA program or practice.

To further engage people in the AAR process it is also valuable to ask them to summarize in a story their experiences with this project or issue and what lessons they learned personally from the experience.

AAR Process


What did we intend to have happen? (*These could come from your action steps outlined in the previous BAR*)
What happened?
What can help explain the difference in our intentions and what happened? What worked? What could have gone better?
What would we do differently next time? What advice would we give ourselves were we to go back to the start?
What is next for us?

Like BARs, AARs can be conducted just about anywhere and vary in length. An AAR should be conducted as close to the implementation as possible and include all the necessary perspectives. With an AAR, it is critical that the facilitator keep the group focused, especially in creating a space that promotes discussion and does not assign blame or judgement. The goal of the AAR is not to focus on what did not work, but on *why* it did not work in order to find a solution that works better the next time. The facilitator of an AAR needs to present a neutral perspective. It is a good idea for the facilitator to gather some input from folks who will be participating in the AAR in advance of the exercise to better understand how folks are perceiving the problem and think about ways to avoid letting the conversation go into failure or blame.

Right Now Survey

A simple and highly effective tool for collecting information that can help you learn what is working, particularly when you have a large group, is a short survey called the "Right Now" survey. This survey should never be more than half a page and is handed out and completed during five minutes of an existing meeting. While the specific questions can vary, they always include some variation of:

- Right now, the greatest opportunities are…
- Right now, I am most concerned about…
- Right now, I most need help with…

The tool surfaces the issues that individuals may not be sharing publicly, perhaps because there is no place to talk about the issue, or they aren't ready to disclose their concerns or ideas to everyone. Once you have established relationships with people, you may not need this as they might come up and tell you what's really going on. But in some settings, perspective and issues are diverse enough that we could quickly lose sight of the breadth of opinions and understandings.

This tool could readily be adapted to reflect the ways in which cultures and communities frame their experiences with TA, learning, coaching and asking for help. The implication of "right now" allows an individual to be responsive in the moment as opposed to committing to a longer-term perspective.

Spark Policy Institute prepared a tool that easily explains how to design, implement, and learn from results of a "Right Now" survey.

Learning Circles

Historically, learning circles have been used by many groups to bring together individuals interested in exploring ideas in a respectful learning environment. The use of learning circles is growing as an evaluation method. Learning Circles are a facilitated process for engaging individuals and groups in collectively looking at and reflecting on real-time data. In learning circles, norms and behaviors are established by those participating. The group jointly agrees on the focus of each session, thereby ensuring that the discussion is salient to its near-term information needs. This approach can be affirming for people without a lot of evaluation experience.

Learning Circles are designed to deepen collaborative understanding of outcomes emerging from the work and inform adaptation and decision-making. Learning Circles use an appreciative inquiry approach and, where appropriate, leverage theories of change (both of which we discussed earlier in this toolkit).

The Building Movement Project developed a resource for how to implement a learning circle for the purpose of examining root causes of problems

The Pioneer Network also developed a resource for understanding how learning circles can facilitate cultural change

Carolyn Cohen of Cohen Research & Evaluation, LLC also shared with Spark Policy Institute a protocol for understanding how to use learning circles as part of an evaluation practice.

This toolkit provided a very brief introduction to tools for shared learning. The assumption behind these tools is that there are many people invested in the outcomes we are seeking and that everyone brings valuable expertise that is needed to get there—it just needs to be surfaced. When practiced and used the right way, these tools can build trust and engagement, as well as strengthen our impact.

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