



## **NOTES: THE EVALUATION PROJECT**

Tuesday November 2, 2010  
12 noon – 1:30 pm EDT

- **23 people participated on the second Evaluation Project conference call.**

### **Thank you to:**

Thank you to all who participated in the call. The project also wishes to extend its sincere appreciation to the Public Health Agency of Canada for hosting the call.

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### **1. WELCOME AND QUICK OVERVIEW**

Welcome to all returning participants and welcome to new participants.

A quick overview of the project based on the August 17<sup>th</sup> call. Notes from that call have been distributed to all; they can also be found on the C2D2 website at <http://www.c2d2.ca/c2d2-evaluation-project-november-2010-0>.

Purpose of meeting: A quick review of the project's intention and focus of this call.

- Confirm principles at this point.
- Determine scope of work.

### **2. PROJECT PRINCIPLES REVIEW AND DISCUSSION**

These principles should be considered evergreen - they are not written in stone and really reflect the learning process and culture of both this group and its collaboration on The Evaluation Project.

*(Additions to the principles based upon the Nov. 2<sup>nd</sup> conference call discussions appear in bold within the principles.)*

#### **November comments on principles:**

##### **Discussion on power and its role/place in evaluation:**

**Comment:** Should this question of power be reflected more directly in the principles, expand on the notion of power and diversity. Evaluation should address diversity and equity by attending to the voices of 'minority as well as majority' experiences. This reflects inclusion of less prominent voices in whatever context of power that is being engaged. (included in #7)

**Comment:** Do we need a unique principle on power?

**Comment:** When we evaluate we need to be aware that we are evaluating a space that shifts and changes within the broader construct of power. (included in #5)

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**Question:** Is there an initial document that these principles are drawn from?

**Miriam's response:** In 2005 there was a document generated from the C2D2 conference *Do's and Don'ts – Design and Principles for Dialogue and Deliberation*. This is on the C2D2 website. Also on the website is the beginning of a *Consensus Document* on what engagement should be; this was generated from C2D2 2009.

**Comment on #6:** Maybe include ... but attempts to be values transparent.

Be aware that we all have values and bring our own subjectivity to evaluation. (added into #6)

***(Additions to the principles based upon the above Nov.2<sup>nd</sup> conference call discussions appear in bold within the principles for review and consideration.)***

From August 17<sup>th</sup> principles were drafted as follows:

1. Evaluation is a process, not a tactic.

a. Need for integrity in evaluation; reflect what we know and need to know.

2. Good practice means considering and incorporating evaluation from the beginning of the project.

a. Evaluation should be thought about from the beginning.

b. It is part of the thinking, rather than something that gets added on at the end

c. Is a strategic element, rather than a single event.

d. Tie it to objectives, look to where the data sources are going to be.

e. Connect it to the principles, both of D&D and of the organization

**f. Evaluation should include looking at the match between outcomes and methodologies.**

3. Quantitative and qualitative methods are equally valued.

4. Evaluation should include a learning focus

a. Don't always evaluate the same things

b. May have completely different (or additional) impacts than expected

c. Check in with multiple perspectives throughout the process

d. Measure from multiple perspectives as well

5. Evaluation includes consideration of the context and of the model of action/change the deliberation and dialogue process is embedded in.

a. Evaluation needs to take into account the reality of uncertainty, could be measuring the short term impact, iteratively to shape the longer term future policy.

i. Uncertainty

ii. Long term vs. short term

iii. Open – not set out to prove a conclusion that we already thought of. Or just fulfill previously set expectations

**iv) Power - When we evaluate we need to be aware that we are evaluating a space that shifts and changes within the broader construct of power.**

6. Evaluation is not values-free, though it should be values transparent.  
**Be aware that we all have values and bring our own subjectivity to evaluation.**
7. Evaluation should uphold the principles of D&D in its design and implementation.
  - a. Should involve participants in the process
  - b. ***Need to be mindful and strategic about the power relationships in an engagement and its design.***
8. Evaluation should be responsive to needs of project sponsors, as well as the need to advance the field.

Additional considerations/comments/questions:

- Need to make the evaluation public. Not just about doing the evaluation, and writing up the report, but in order to advance the field, the evaluation has to get out there. Especially when an evaluation is not as rosy as a sponsor or participant wants. Be transparent in the evaluation, as it increases the accountability. Evaluation should be accountable to all the parties (sponsor and participants), and the larger D&D community. Provide an evaluation summary, to reduce issues around confidentiality.
  - a. If the terms of the engagement (to conduct evaluation) include a clause of confidentiality, then you can't disclose
  - b. Include what worked and what didn't work.
  - c. Evaluation of a particular process vs. evaluation across multiple processes – we should each take more responsibility for looking at the multiple processes question.
- What about power? Without some acknowledgement of where the power lies in the decision making process, things can be quickly undermined in evaluation. Be clear about what is up for decision making, and what the input is for. There are places where power can be reckoned with, and where there are possibilities, those power holders can be aligned with the process.
  - a. Through context, evaluation can respond to the power dynamics  
Above were the comments originally generated around the August discussion around project principles.

### **3. SCOPE OF WORK FOR THIS PROJECT**

#### **i. Are there processes, documents or initiatives we are involved in that we should be looking at or writing about that deal with the kind of issues we have begun to identify?**

**Response comments:** Is there some way to tap the wisdom of everyone on the call? There is a whole host of wisdom and experience (more generally as project's have issues of confidentiality) then maybe this would shape the substance of our calls.

Could those calls be structured around different aspects of evaluation ie. Evaluation process, etc.?  
That could be a way to organize it.

It would be very helpful to have very structured ways to share our experiences. Different kinds of questions at different times.

Different people like different structures, for example balancing more informal calls with more structured calls.

We should look at other ways of communicating ie. Conference calls, face-to-face, other tools such as Maestro conferencing which permits both small group discussions and larger group discussions in the course of a conference call.

There is an industry out there is really struggling with their public engagement. If this process were someone brought to the attention of this industry and maybe our process might be helpful to them they might be willing to help facilitate this project. This is just an idea for consideration.

This notion of reaching out underscores how can we link to help others do better planning. How do we do this and how well do we do it are two distinct questions that may inform the evaluation project.

**ii) Priorities identified by the group were reviewed briefly and discussed as a way to inform the focus of The Evaluation Project ( page 3 from August 17 notes)**

**Ie. Comparability, audiences for evaluation etc.**

**Is there a tip sheet on good evaluation practice that would be helpful as a resource?**

**Response comments regarding the creation of a TIP SHEET:**

Creating a Tip Sheet: focusing on common questions regarding designing an evaluation

Creating a Tip Sheet: articulating the different goals of D&D

Are we referring to a tip sheet for dialogue or for evaluation?

Something that would also be useful: tips around identifying D&D goals that bridges techniques used.

**How the questions we might ask in evaluation will change depending on the outcomes we were seeking?**

There is some work we could do around the idea of comparability, recognizing that questions will vary depending on the purpose of the dialogue.

**iii) Are there other kinds of things we should consider when we are considering the scope of the project?**

**Response:** Building the evidence base that D&D makes a difference and impacts decision making; that was another one that people seemed to be quite interested in for us to address in our scope.

Should we put a call out to gather work that has been done already that indicates that D&D has had an impact on decision making.

Where do we find the time/process etc to gather the information? And then we need to do something with it.

Should this be a focus for a call to provide some information to the group about processes that they know where D&D has had an impact of some kind.

**iv) What are the best ways to move forward when we are trying to engage in a cross-country, multi-country project to move this work forward?**

**Response:** A working group model was discussed, with chairs, regular calls and reporting back to the larger group during the regular project evaluation calls.

One caller noted involvement in work in the US on a parallel process. Should he just continue to do that separately, should we join together or just report back on what we are doing?

**Thematic areas of work:**

1. **Impact of D & D** - What are we learning about impact based on our evaluations. The one area of impact flagged from our last meeting was the impact on decision making; this may help serve to inform the scope of this work.

**LEADS: KATE (CHRF), JONATHAN, JAN**

2. **Documenting and Synthesizing Evaluation** - Collecting evaluation examples, doing a synthesis and reviewing and what are these case studies are telling us about D&D

**LEADS: MIRIAM, LEO**

3. **Comparability of D & D** – As we are doing different evaluation on D&D, can we come up with similar questions that we can use to compare across processes?

**LEADS: STEVE**

**More specific pieces of work:**

The evolution of the TIP SHEET

Charlotte - volunteered to work with others (Kate) on moving the TIP SHEET idea forward

Revising principles in light of today's conversation (Pattie)

**4. NEXT STEPS**

**Action: Setting up working groups**

Andrew: I would be happy to put the call out to determine if others are interested in participating in these areas of work. Send out a quick survey on the three areas and let people volunteer if they wish.

Each working group can self-organize and prepare a one-pager to focus on describing their work etc. This could be presented at the next call (likely in January 2011).

- Description of these themes of work.
- Need list of group to date as well.

**Action:** We need to make sure C2D2 website is useful to the group. – Miriam will post C2D2 documents referred to during this call.