



Pin the Tail on the Donkey

Measurement & Evaluation Amid Complexity

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www.back-loop.com

Purpose & Goals

- To experiment with some of the hunches we are developing out of our experience in the field
- To gather your reactions, responses, and ideas about improving how we do measurement & evaluation of complex activities – without any expertise necessary
- To learn together in a seriously playful way that may induce confusiasm among us all!
- To share a few approaches to measurement & evaluation that others have lovingly provoked us with... but without the sting (we hope)

P. S. YOU WILL NOT OFFEND US IF YOU WANT TO GO TO A MORE CONVENTIONAL SESSION

Agenda & Sequence of Activities

- Identify measurement challenges :: 1-2-4-All 
- Sift-and-sort challenges :: Agreement~Certainty Matrix 
- Compare & evaluate responses to the challenges at hand :: 1-2-4-All  
- Loving provocations :: Presentation & discussion

What are you trying to understand, measure & evaluate about your efforts to implement lean & continuous improvement?

1-2-4- All Steps

1. Alone :: Respond to prompt :: 1 min
2. Pairs :: Share responses :: 2 mins
3. Quartets :: Continue clarifying and identify 1 or 2 examples to share :: 4 mins
4. Full group :: Harvest key examples :: 4 mins



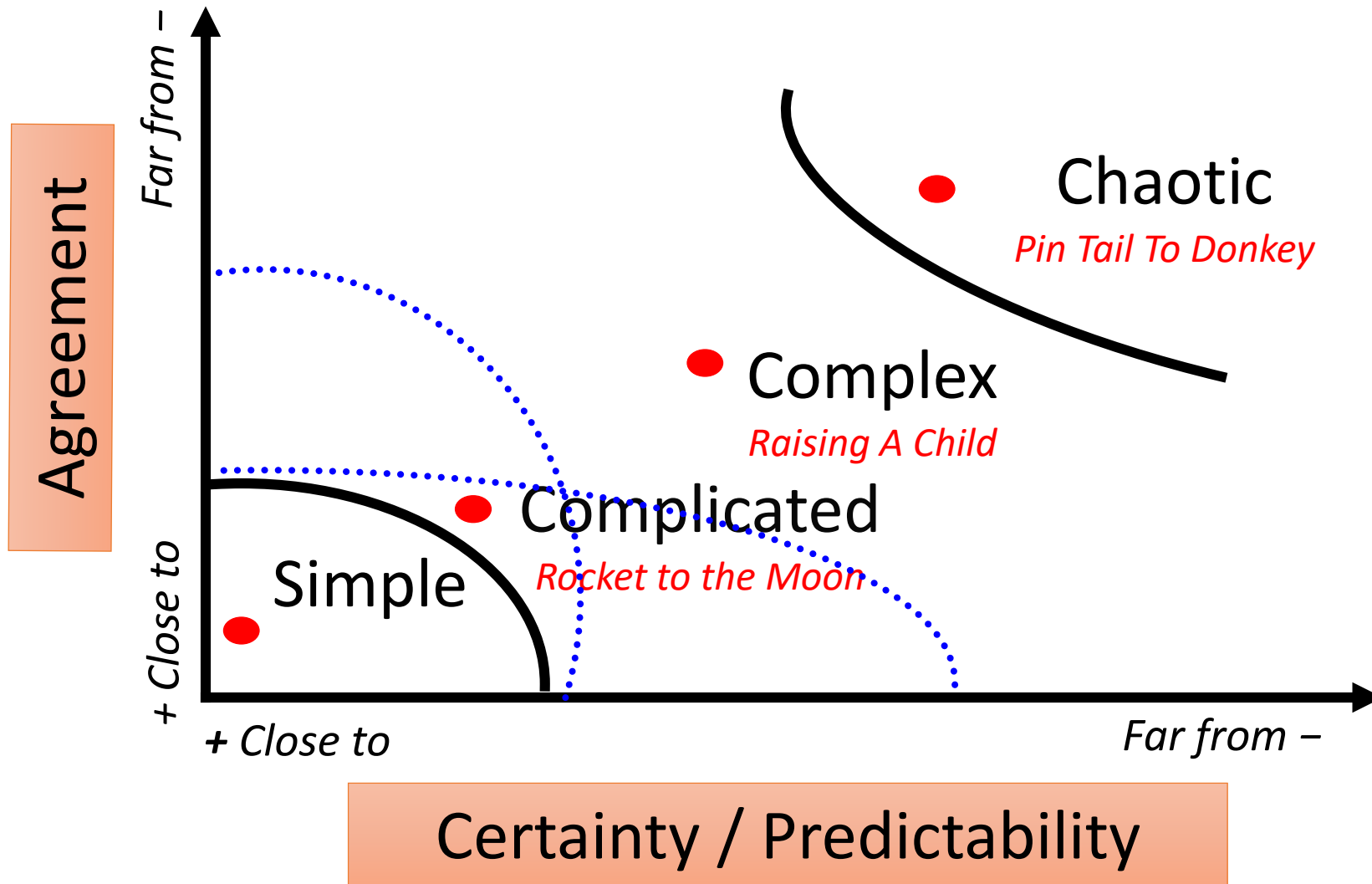
Agreement~Certainty Matching Matrix

Sorting Challenges into Simple, Complicated, and Complex Categories

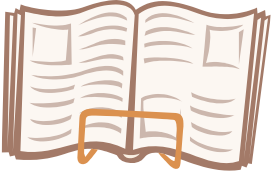
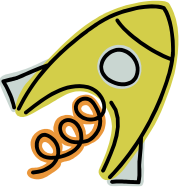

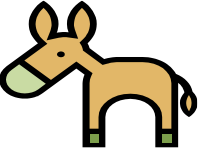


Agreement Certainty Matrix

Sort Challenges Into Simple, Complicated, Complex Categories



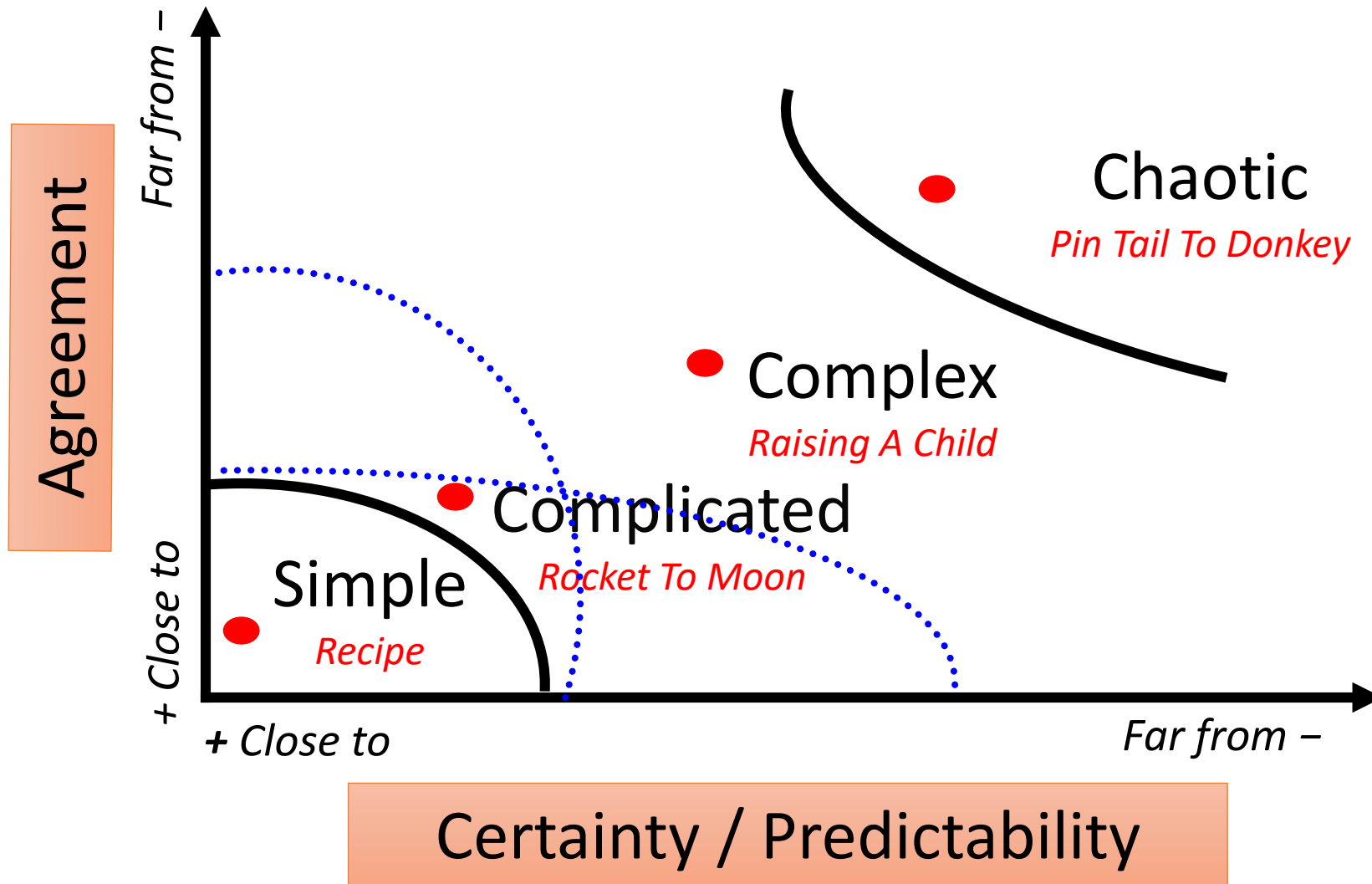
Management Challenges

<p><u>SIMPLE</u> Following a Recipe</p> 	<p><u>COMPLICATED</u> Sending a Rocket to the Moon</p> 	<p><u>COMPLEX</u> Raising a Child</p> 	<p><u>CHAOTIC</u> “Pinning the Tail On The Donkey”</p> 
The recipe is essential	Rigid protocols or formulas are necessary	Protocols rarely help; launch experiments to see what works	Rigid protocols may be counter-productive or misdirect responses
Recipes are tested to assure easy replication of success	Sending one rocket increases assurance of future success; key elements are identical	Raising one child provides experience but no assurance of future success	Experience may help or hinder finding what works to diagnose & abate the crisis
No particular expertise is required (cooking skill can improve the success rate)	High levels of expertise in a variety of fields are necessary for success	Expertise can contribute but is neither necessary nor sufficient to assure success	Rapid action & improvising skills, plus unleashing a network of local on-the-ground know-how can help
Recipes produce standardized, predictable results every time	Rockets are similar and there is a high degree of outcome predictability	Every child is a unique individual with unpredictable “outcomes”	As unknowables recede, novel patterns may emerge

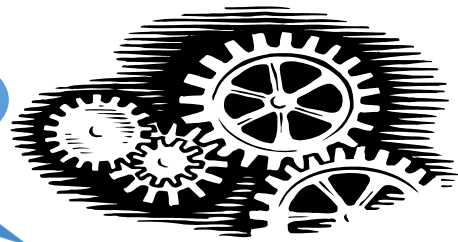


Agreement Certainty Matrix

Sort Challenges Into Simple, Complicated, Complex Categories



Clockwork: You gain from control



Simple/Complicated Machine Metaphor

Role defining - specify job and task descriptions

Conflict management - restore order in each part

Tight structuring - use formal chain of command

Simplifying - prioritize or limit simple actions

Socializing - seek homogeneous values & ideas

Decision making - find the "best" choice

Knowing - decide & tell others what to do

Controlling - tightly managed execution w/max specs

Planning via forecasting - plan & then roll out

Staying the course - align & maintain focus



Anti-fragility: You gain from disorder

Complex Biologic Metaphor

Relationship building - work with patterns of interaction

Uncover paradox - draw out difference as source of creativity

Loose coupling - work with informal communities of practice

Complicating - add more degrees of freedom & multiple actions

Diversifying - draw out & exploit difference

Sense making - many right answers in different local contexts

Learning - act/learn/plan at the same time

Improvising - acting in an instant w/minimum specs

Shape robust adaptive strategies - co-evolve & hedge strategies

Noticing emergent direction - build on what works

Place the **items from your list** on
the A~C Matrix worksheet.

Example: Education & Classroom Learning

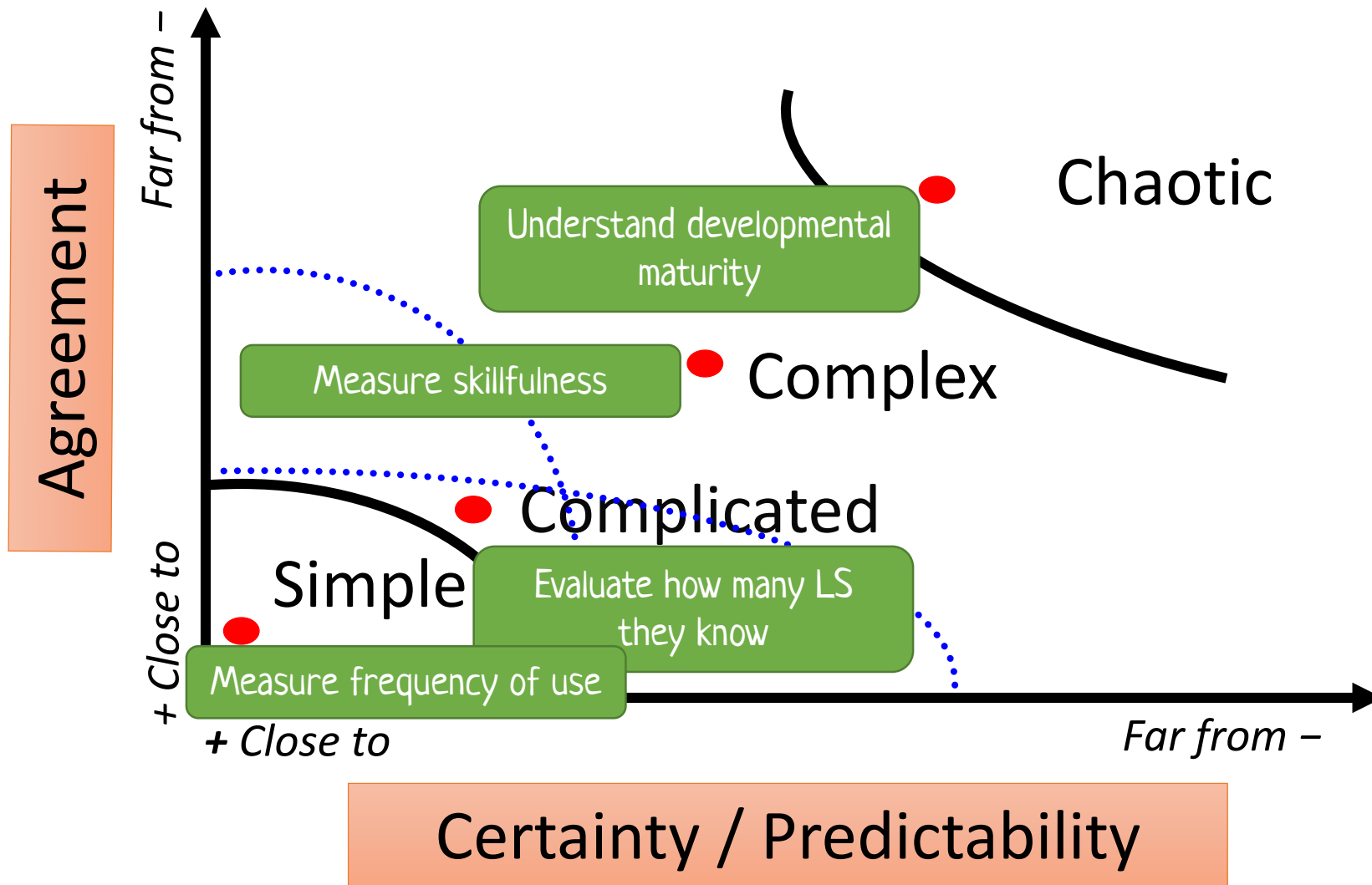
What I want to understand, evaluate & measure is...

1. how the classroom experience is advancing my student's developmental maturity
2. how well they know the 33 Liberating Structures
3. how skillful they are with the Liberating Structures repertoire
4. the frequency with which they use Liberating Structures when interacting with groups



Agreement Certainty Matrix

Sort Challenges Into Simple, Complicated, Complex Categories



Compose a **list of the approaches** you take to measure, evaluate, & understand these things

Example: Education & Classroom Learning

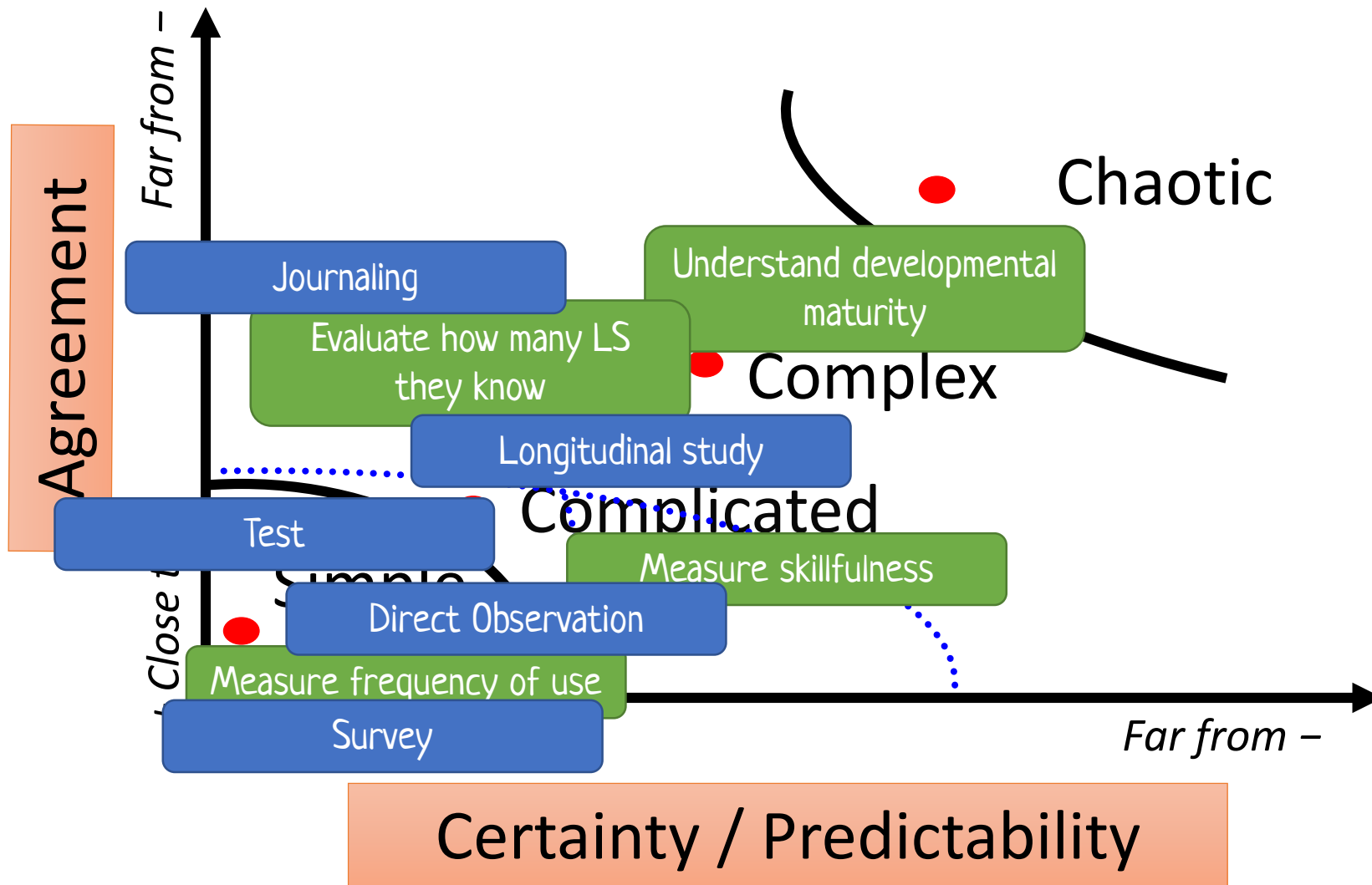
My approaches to these questions include...

1. Longitudinal qualitative study where I interview each student every year for 10 years
2. Create a test that asks them to identify the steps of each Liberating Structure and write about the importance of the 5 micro-organizing elements
3. Develop a survey that asks them to indicate how frequently they've used each structure over the past 2-4 weeks
4. Ask them to keep a journal and write regular reflections on what they are learning in the class and the difference that LS has made for them



Agreement Certainty Matrix

Sort Challenges Into Simple, Complicated, Complex Categories

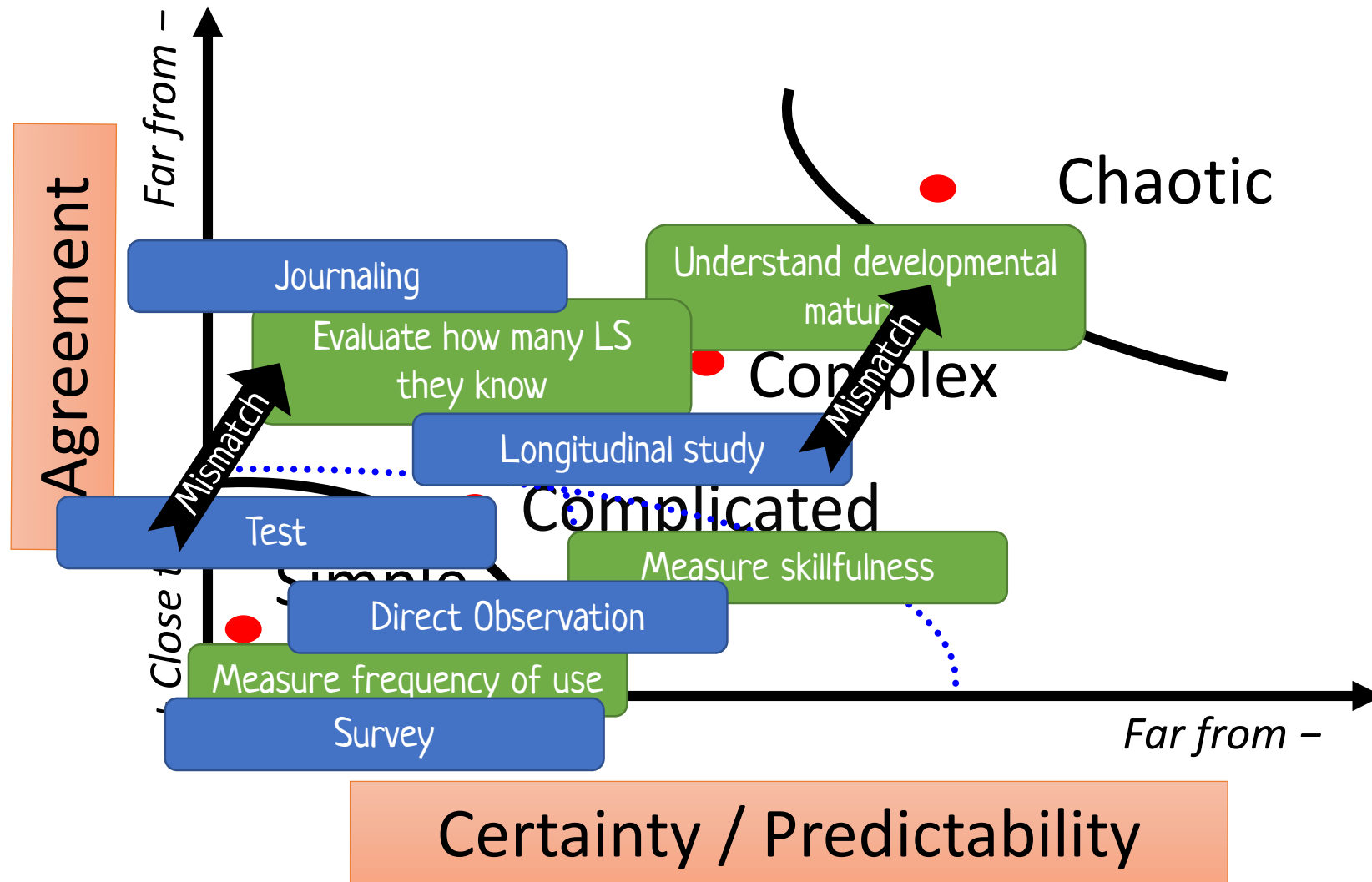


Look for mismatches: How well do your measurement, evaluation, and assessment practices 'match' what you want to understand? What do you notice?



Agreement Certainty Matrix

Sort Challenges Into Simple, Complicated, Complex Categories



1-2-4- All Steps

1. Alone :: Respond to prompts :: 1 min
2. Pairs :: Share responses and help each other :: 2 mins
3. Quartets :: Consider implications of any mismatches & generate ideas :: 4 mins
4. Full group :: Harvest key ideas :: 4 mins

So, what are the implications of
any mismatches?

Now, what ideas do you have for
developing better matched
approaches?

How will we know we are making a difference?

- What will we notice has changed?
- How will we know behaviour and culture is changing?
- What kinds of things will we actually see?

A Family of Measures

Metrics To Be Selected and Refined for Reporting and Evaluation

<h2><u>Relational Coordination</u></h2> <p>Relationship Attributes</p>	<h2><u>Social Networks</u></h2> <p>Relationship Patterns</p>	<h2><u>Process Measures</u></h2> <p>Efficiency-Economy</p>	<h2><u>Technical Outcomes</u></h2> <p>Effectiveness</p>
<p>Attributes Survey Baseline</p> <ul style="list-style-type: none">□ frequency, timeliness, accuracy, & problem-solving focus of cross-functional communication□ mutual respect□ shared goals & knowledge□ rich/lean communication□ diverse participation	<p>Social Network Baseline</p> <ul style="list-style-type: none">□ core and periphery participation in new innovation practice□ awareness (individual)□ influence (individual)	<p>Baseline Efficiency</p> <ul style="list-style-type: none">□ employee satisfaction□ cycle time metrics□ financial performance□ external partner satisfaction	<p>Leapfrog Innovation</p> <ul style="list-style-type: none">□ rate of promising concepts, prototypes, and field tests□ scientific papers generated□ advances judged by external partners□ failure rate (boldness index)□ rate of interdisciplinary collaboration
<p>Sources:</p> <p>Relational Coordination Research Collaborative http://rcrc.brandeis.edu/about-rc/difference.html</p> <p>“Seven Characteristics of Successful Work Relationships,” McDaniel, et al. http://www.aafp.org/fpm/2006/0100/p47.html</p> <p>RC Mapping http://www.liberatingstructures.com/relational-coordination/</p>	<p>Sources:</p> <p>Innovation Learning Collaborative http://www.liberatingstructures.com/fs7/</p> <p>Network Weaving http://www.networkweaver.com</p> <p>Social Network Webbing http://www.liberatingstructures.com/23-social-network-webbing/</p>	<p>Sources:</p>	<p>Sources:</p>

Who's in Our Growing Family

Liberating Structures	Developmental Evaluation	Relational Coordination	Social Network Mapping	Diffusion of Innovation
Generative Relationships STAR :: Diagnose and act on the attributes that enable a group to reliably generate novel results	What, So What, Now What :: Use evidence gathered in hindsight, to generate insight, shape foresight	Relational Coordination Survey :: Measure a set of variables related to communication patterns within groups and across scales	Network Pattern Cards :: Quickly notice the way change is unfolding in groups	Still in Development
Wicked Questions :: Evaluate progress on the paradoxical realities you must face up to	Simple Ethnography :: Go to where the action is unfolding and gather evidence and observations about what's happening		Power Maps :: Identify the density of connections & loci of power within groups	
Ecocycle~Panarchy :: Continuously notice the evolutionary progression of activities and identify opportunities to work across scales	10x10 Writing Prompts :: Rapidly generate large amounts of qualitative data about what's happening		Digital SNW Maps :: Assess how information and practices flows across a group	

Liberating Structures

- Invite & include more people to participate in shaping your measurement, evaluation, and learning efforts
- Distribute responsibility for gathering data & evidence more widely
- Generate novel insights by continuously using different LS to evaluate, measure, and notice progress or stagnation together
- Make it SAFE for everyone to face up to the challenges-at-hand and rigorously confront reality

www.liberatingstructures.com

Keith McCandless & Henri Lipmanowicz

Developmental Evaluation

- Avoid simple or complicated approaches to understanding complex, unfolding and unpredictable circumstances
- Effectively assess innovation or change initiatives that defy conventional approaches
- Use evaluation to make improvement constant and continuous

www.betterevaluation.org

MQ Patten

Relational Coordination

- Identify and assess how communication flows within, across, and beyond groups
- Understand how the different levels of organization interact and respect one another's work
- Look for simple opportunities to shift patterns that dampen innovation and amplify those that enable it

<http://rcrc.brandeis.edu/>

Relational Coordination Research Collaborative — Brandeis University

Attribution:

- Liberating Structures co-developed by Keith McCandless & Henri Lipmanowicz
- Developmental Evaluation inspired by Michael Quinn Patten
- Relational Coordination Measures & Survey adapted from Brandeis University
- Diffusion of Innovation drawn from Everett Rogers

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