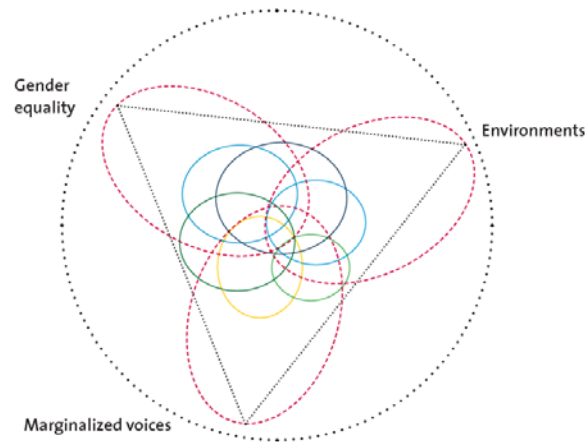# Inclusive Systemic Evaluation
for Gender equality, Environments and Marginalized voices:
A new approach for the SDG era.
#ISE4GEMs

European Evaluation Society – 2018
Thessaloniki, Greece
Presenters: Shravanti Reddy, Ellen Lewis, Anne Stephens

Shravanti Reddy, Evaluation Specialist, Independent Evaluation Office, UN Women
• UN Women and other UN agencies for a decade, development experience in Africa and Asia
• Former co-Chair of the UNEG Taskforce on Human Rights & Gender Equality that developed guidance and lead for methodological development UN Women IEO

Anne Stephens, PhD, James Cook University
• Sociologist, critical systems thinking theorist, teacher and research manager, health/education evaluations for Northern Australian communities
• DFAT Endeavour Fellowship

Ellen Lewis, PhD
Centre for Systems Studies, University of Hull, United Kingdom
Organisation Development Consultant

Todays Agenda

- Welcome & Introductions – Method Moment

- Change Management

- Introduction to Systems Thinking

- **BREAK – 20 minutes**

- GEMs Framework

- ISE4GEMs Approach and Systemic Theory of Change

- **12:15 LUNCH 60 Minutes**

- Evaluation Preparation & Design

- Data Collection

- **BREAK – 20 Minutes**

- Data Analysis, Interpretation

- Capacity Development for Social Change

- Evaluations – EES and ISE4GEMs

- Closing

- **18:00 END**

Learning Objectives

By the end of this workshop, participants will be able to:

- List 1-2 activities that can be used to create a safe, inclusive, participatory environment for learning

- List qualities of systems thinker and an ISE4GEMS practitioner

- Describe key components of systems thinking and their relationship to conducting an ISE4GEMs evaluation

- Use the ISE4GEMs Chapter 5 – Planning, to develop an evaluation plan of their own chosen project

- Have knowledge of the ISE4GEMs data collection and analysis phases, and where to find practitioner tools and guidance to support them to use this approach in these phases of their evaluation.

- Others?

INCLUSIVE SYSTEMIC EVALUATION
FOR GENDER EQUALITY,
ENVIRONMENTS AND MARGINALIZED
VOICES (ISE4GEMs):

A new approach for the SDG era.

International Advisory Group

Priya Alvarez, Independent Evaluation Office, UN Women, United States

Yasmine Ergas, School of International and Public Affairs, Columbia University, United States

Buyana Kareem, Uganda Management Institute Department of Public Administration

Margaret Korosec, OpnUp Ltd., eLearning Consulting, United Kingdom

Donna M. Mertens, Gallaudet University, United States

Gerald Midgley, University of Hull Business School, Centre for Systems Studies, United Kingdom

Dr. Alexandra Pittman, Impact Mapper, United States

Martin Reynolds, School of Engineering and Innovation, Open University, United Kingdom

Ratna Sudarshan, Independent Researcher, former Director Institute of Social Studies Trust, India

Juha Uitto, Independent Evaluation Office, Global Environment Facility, United States

Bob Williams, Independent Evaluation and Systems Thinking Consultant, New Zealand

Part A (Practitioner Theory)
Chapters:
1. Introduction
2. Systems Thinking
3. The GEMs Framework
4. ISE4GEMs Approach and the SToC

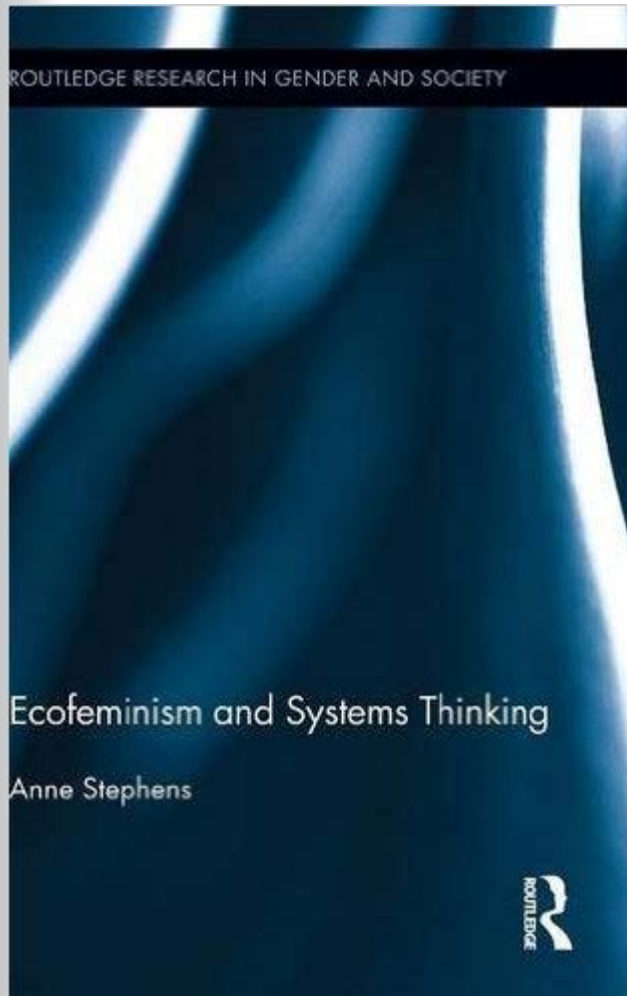**Part B (Practitioner Approach)**
Chapters:
5. Evaluation Preparation and Design
6. Data Collection
7. Data Analysis, Interpretation and Reporting
8. Capacity Development for Social Change

Part A
Practitioner Theory

ISE4GEMs
Chapters 1

ROUTLEDGE RESEARCH IN GENDER AND SOCIETY

Ecofeminism and Systems Thinking

Anne Stephens

UNIVERSITY OF **Hull**

Centre for Systems Studies

Gendered Systemic Analysis:
Systems Thinking and Gender Equality
in International Development

Thesis submitted for the Degree of
Doctor of Philosophy in Systems Studies

Anne Stephens (2013)   **Ellen D. Lewis (2016)**

2

ISE4GEMs

Chapters 2

167 Targets, 300+ Indicators

The relationship of the 17 UN Sustainable Development Goals (SDGs) to the framework of ecological economics and the overarching goal of a sustainable, equitable and prosperous system. Costanza et al. 2016. Modelling and measuring sustainable wellbeing in connection with the UN Sustainable Development Goals. *Ecological Economics.*

- Uncertainty

- Emergence

- Feedback

- Intersectionality
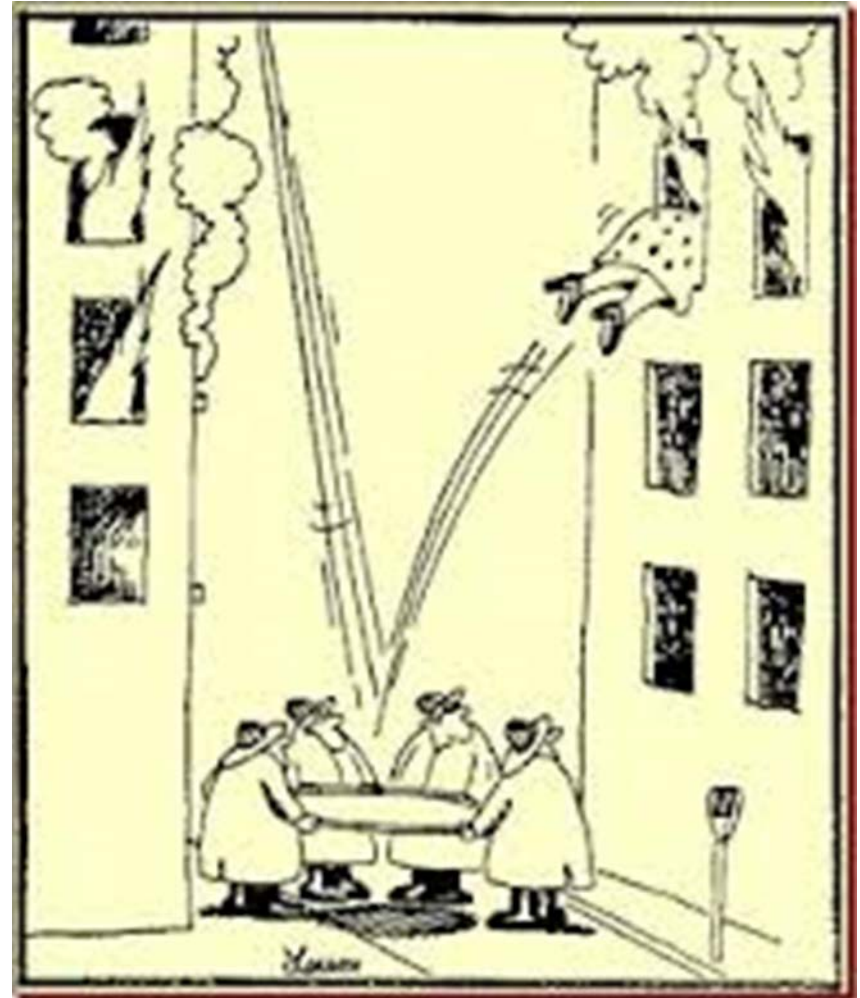
Systematic analysis implies a thorough, predictable, and controlled process which is essentially reproducible but may not consider all the interactive parts of the system and stakeholders.

Systemic analysis encourages a critical and holistic analysis of the opportunities, constraints, and relationships of parts within a system, analyzing the system as a whole.
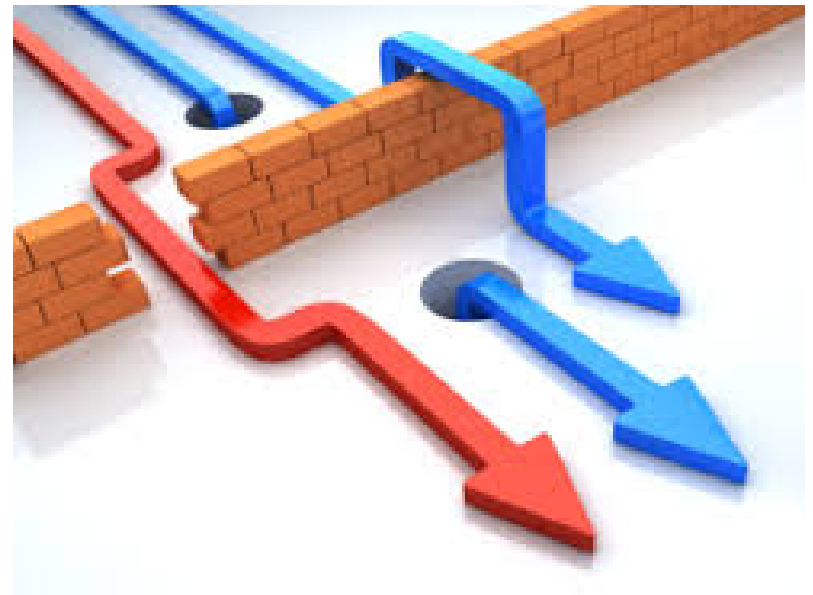
1. **What are the parts of this system?**
2. **What could impact, influence, change this system?**

➢ **Interrelationships**: connections between people, things or ideas.

➢ **Perspectives**: different ways a situation can be viewed or understood: formed by values, beliefs and what we know about the world.

➢ **Boundaries**: the limitations of understanding of a situation. Defined by our knowledge, resources, ideas, values, biases, priorities or perspectives.

BREAK
20 Minutes

Chapter 3
The GEMs Framework

Systemic evaluation is inclusive of the complex dimensions of Gender equality, Environments and other Marginalized voices – the 'GEMs'.

The GEMs dimensions provide evaluators a wide set of new, intersectional combinations in which to undertake their analysis.

How can systemic thinking be used to make decisions about which of these should be included within the boundaries of evaluation?

Gender equality

defined broadly here to refer to women and men, transgendered and intersex identities, captured partly in terms such as lesbian, gay, bisexual, transgender, queer or questioning, and intersex (LGBTQI).

gender-responsive analysis or evaluation may be limited if it does not attempt to address the root causes of inequalities in people's lives

The aim is to contribute to the redefinition of the systems and institutions where inequalities were created and maintained. It is intuitively systemic.

Environments

A call for **greater efforts** to review and assess the impact of social interventions on environments.

"Environments" captures both human-made and natural socioecological landscapes and systems.

Liveability, health, sustainability is "inhabitability" -

• Does an intervention leave a place more inhabitable?

• How has degradation changed the quality of life?

• Consideration of flora and fauna?

How do we give 'voice' to environments as 'stakeholders'?

Marginalized voices

Groups of people and their attributes pushed to the margins of society and assigned lesser importance, discriminated against or excluded

Elders, youth, LGBTQI, ethnic and religious groups, gender, disabled, indigenous, migrant, refugee, and people living with HIV/AIDS.

Non-human 'voices' such as flora and fauna, culture, languages, ideas, etc.

It is a form of acute and persistent disadvantage or being neglected rooted in structural and social inequalities.

ISE4GEMs practitioners are acutely attentive to power dynamics.

We think about power as forces or fields of action.

When we enter the concept of boundaries, social boundaries define fields of possibilities and constraints on social action.

We question our position in the system, differences between us and our stakeholders; we ask questions about differences that matter, issues and causes of oppression and safety.

It is important to discuss each dimension but we do not wish to infer that they are siloed concepts.

The GEMs dimensions overlap, and we see a connection between them through "continuums of marginality"—an idea we will return to after the break.
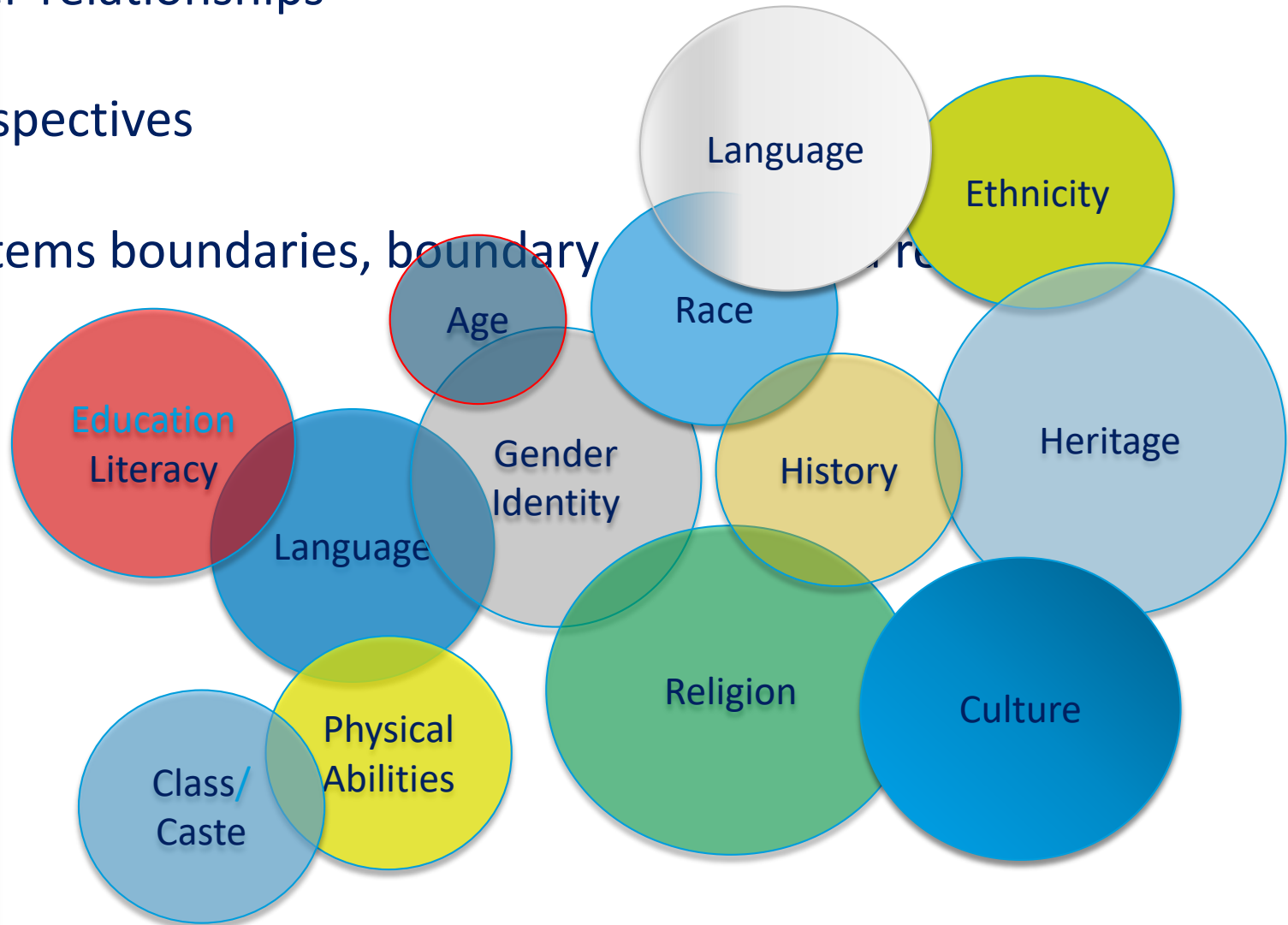
BREAK
20 Minutes

Case study

Using the case study provided, in your group review the GEMs dimensions.

Do you think we will find representation of each dimension in the case study?

- Inter-relationships

- Perspectives

- Systems boundaries, boundary

Gender equality

- Non-binary

- Gender-responsive evaluation: to reveal, describe and explain different impacts on men's, women's, boy's, girl's, intersex and transgendered people's lives

Environments

- Marginalized stakeholder

- Dual effects

- Material and cultural

- Human-made and natural

<u>M</u>arginalized voices

- Marginalized and silenced people of concern to an intervention

- Is not pre-defined and context-specific

- Elders, youth, LGBTQI, ethic, religious groups, gender, ability, indigenous, migrant, refugee etc., people or things, i.e. ecological systems

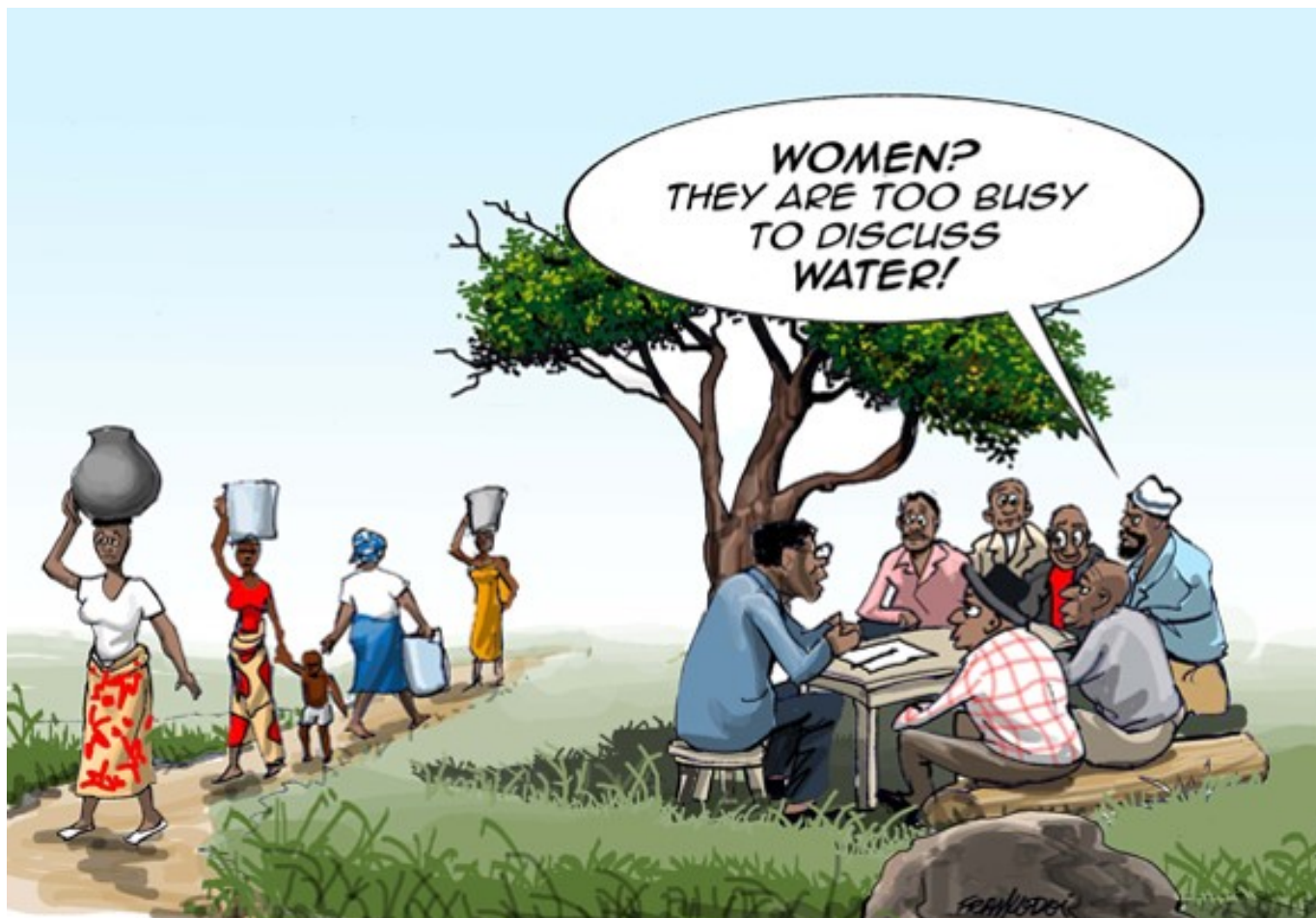- Acute and persistent disadvantage
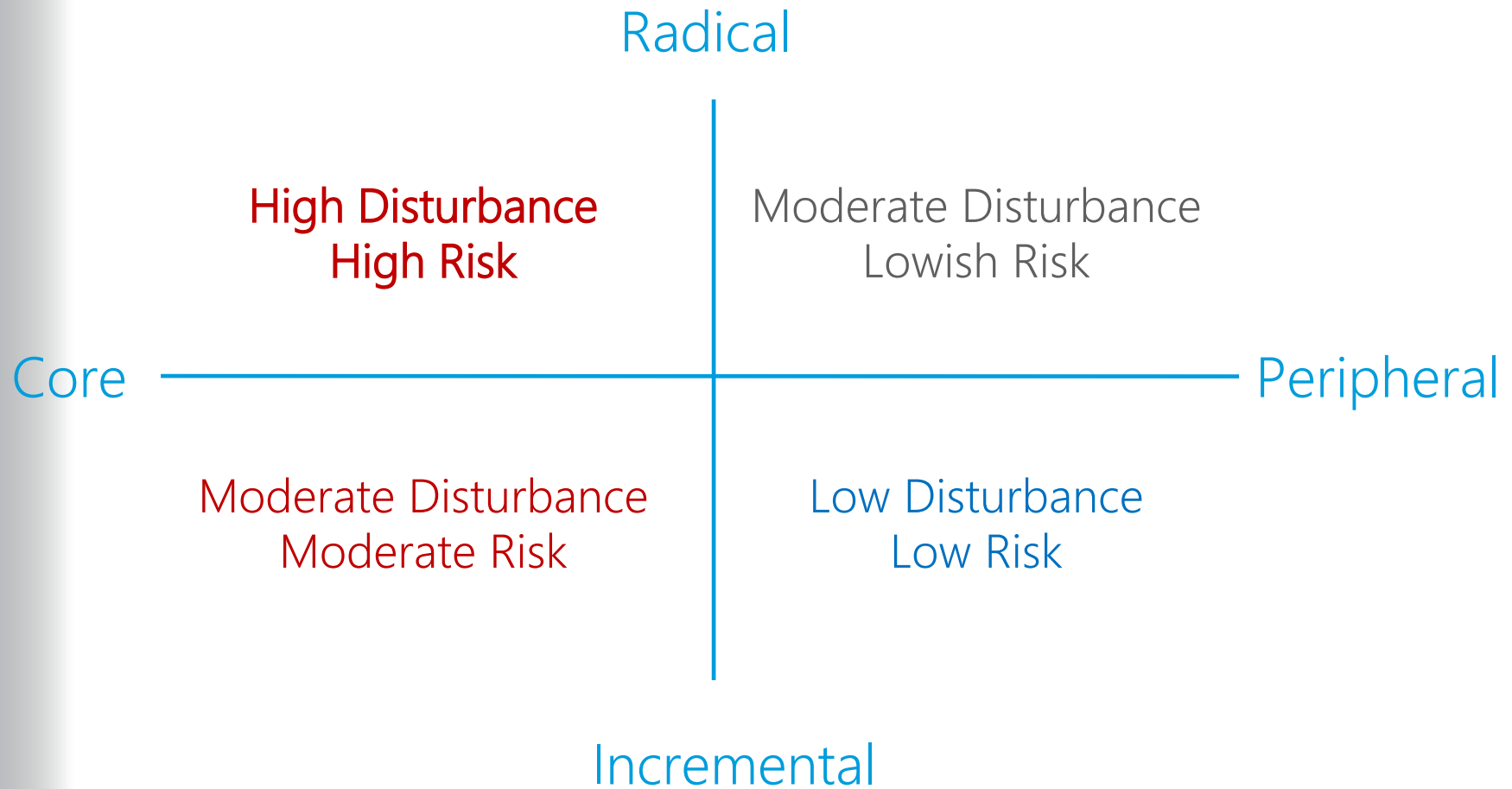
Chapter 4

ISE4GEMS APPROACH AND THE STOC

Chapter 4

ISE4GEMS APPROACH AND THE STOC

Environments

Marginalized voices

Gender equality
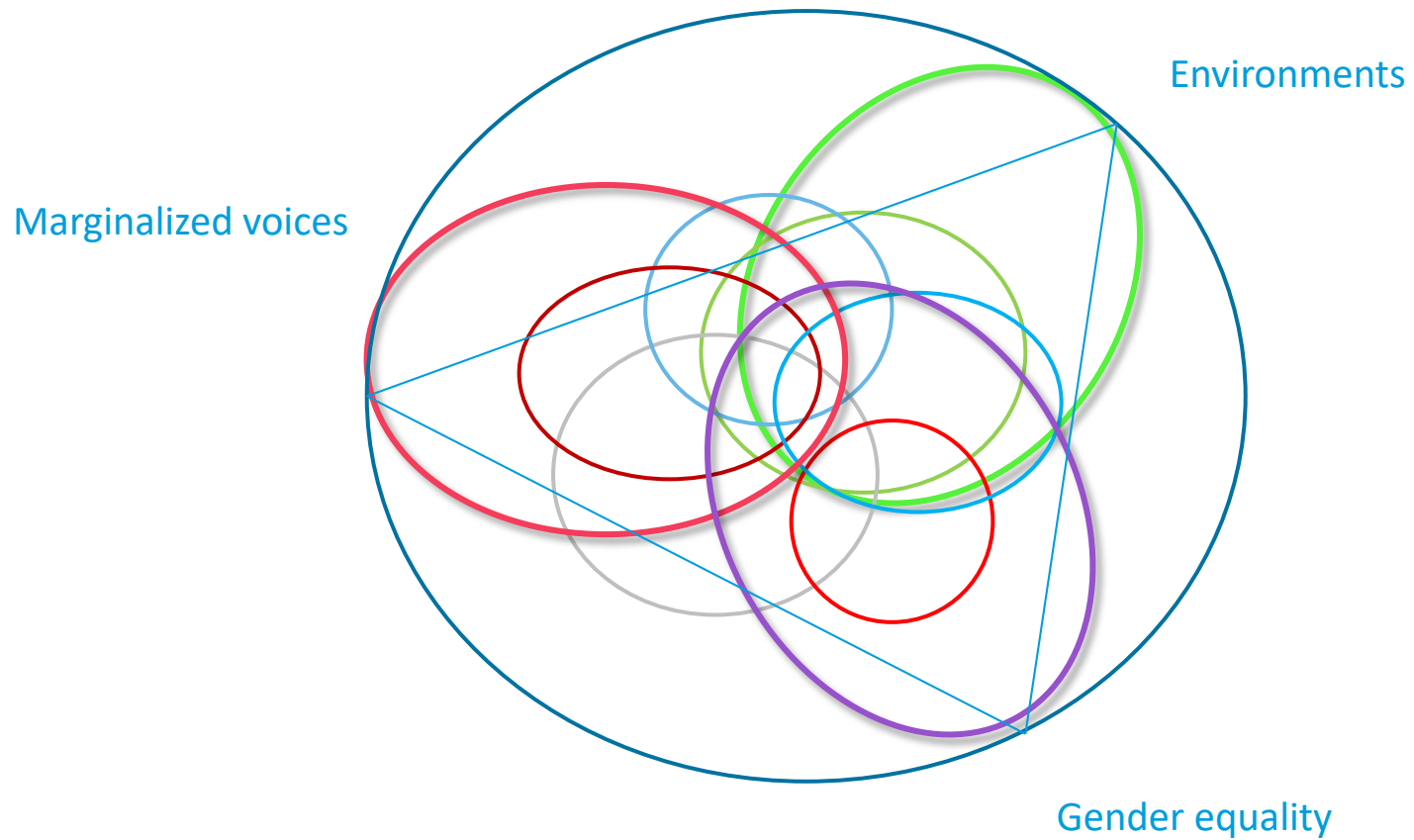
LUNCH
1 HOUR

1. Minor change in tasks or processes involving learning a new skill (e.g., submitting reports in a new format and to a new person).

2. A more significant change in tasks and processes (e.g., change from a file system to a database)

3. A change within the existing paradigm (e.g., doing for clients to helping clients do it themselves)

4. A change of paradigm (e.g., change from mission based administration to business based administration)

Type of Change/Level of Risk

Radical

High Disturbance
High Risk

Moderate Disturbance
Lowish Risk

Core — Peripheral

Moderate Disturbance
Moderate Risk

Low Disturbance
Low Risk

Incremental

Change Strategies

1. Appeal to reason and self-interest (e.g., provide explanations of the importance of change, share data; it assumes rationality)

2. Appeal to internal motivation (relies on motivation; emphasizes the client system, addressing attitudes, values, norms, and the external and internal relationships)

3. Build in accountability (i.e., it's about compliance)

- Change is a shift in the external world.

- Transition is an internal process that people go through in response to the shift.

Figure 1: Basic Change Management Model
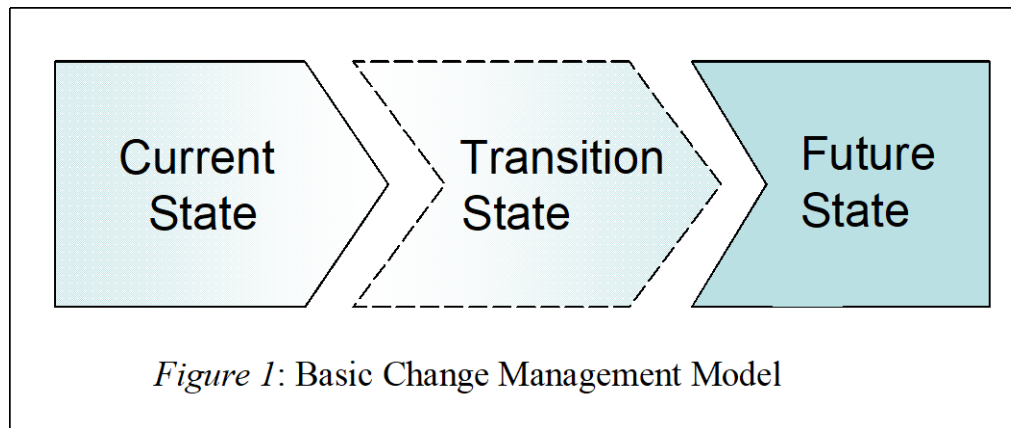
Change Management: The ability to lead the transition of people, processes and results from a current state to a future (different) state.
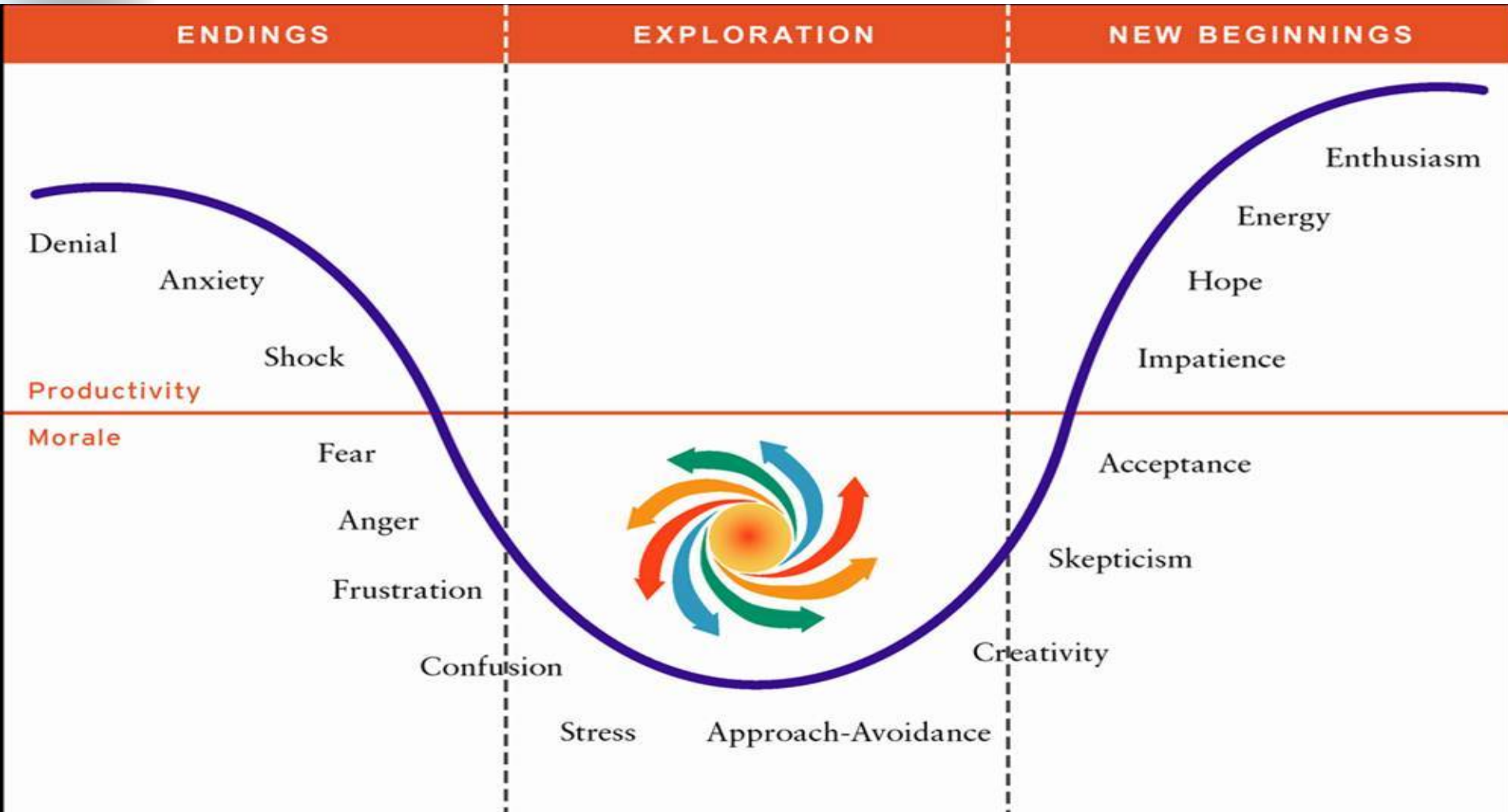
It's not so much that we're afraid of change or so in love with the old ways, but it's that place in between that we fear… It's like being in between trapezes. It's Linus when his blanket is in the dryer. There's nothing to hold on to. ~ Marilyn Ferguson

1. Change imapcts people cognitively, emotionally, and physically.

2. People will feel awkward, ill-at-ease and self-conscious.

3. People initially focus on what they have to give up. Change often involves a loss and people go through the loss curve.

4. People will feel alone even if everyone else is going through the same thing.

5. People can only handle so much change.

6. People are at different levels of readiness for change.

7. Change creates confusion and unpredictability
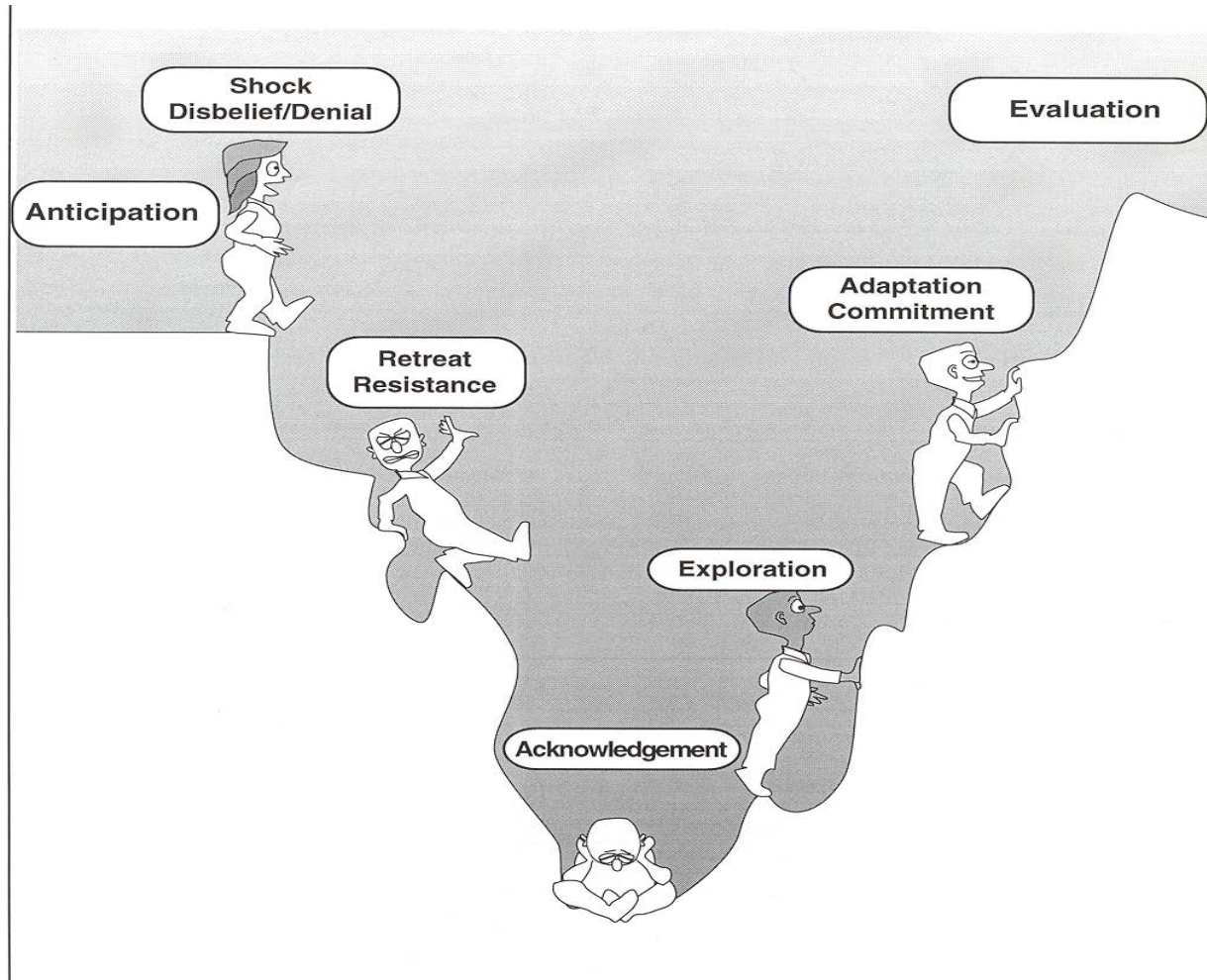
Reflect on where you think you are regarding the individual stages of change and share with a neighbor.

Kotter's Change Model
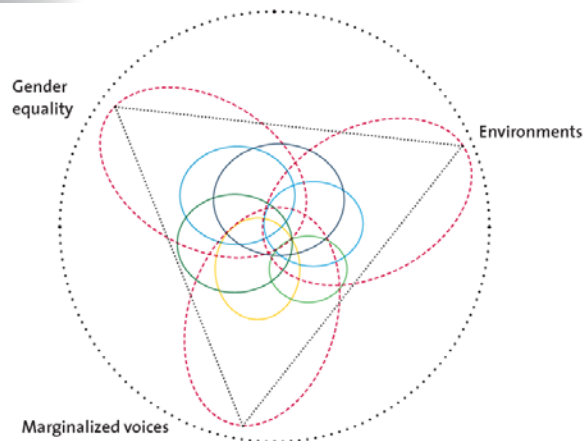
8. Change Culture

7. Don't let up

6. Low Hanging Fruit

5.Create Movement

4. Communicate Change Positively

3. Articulating the Vision

2. Find Champions

1. Increase Urgency
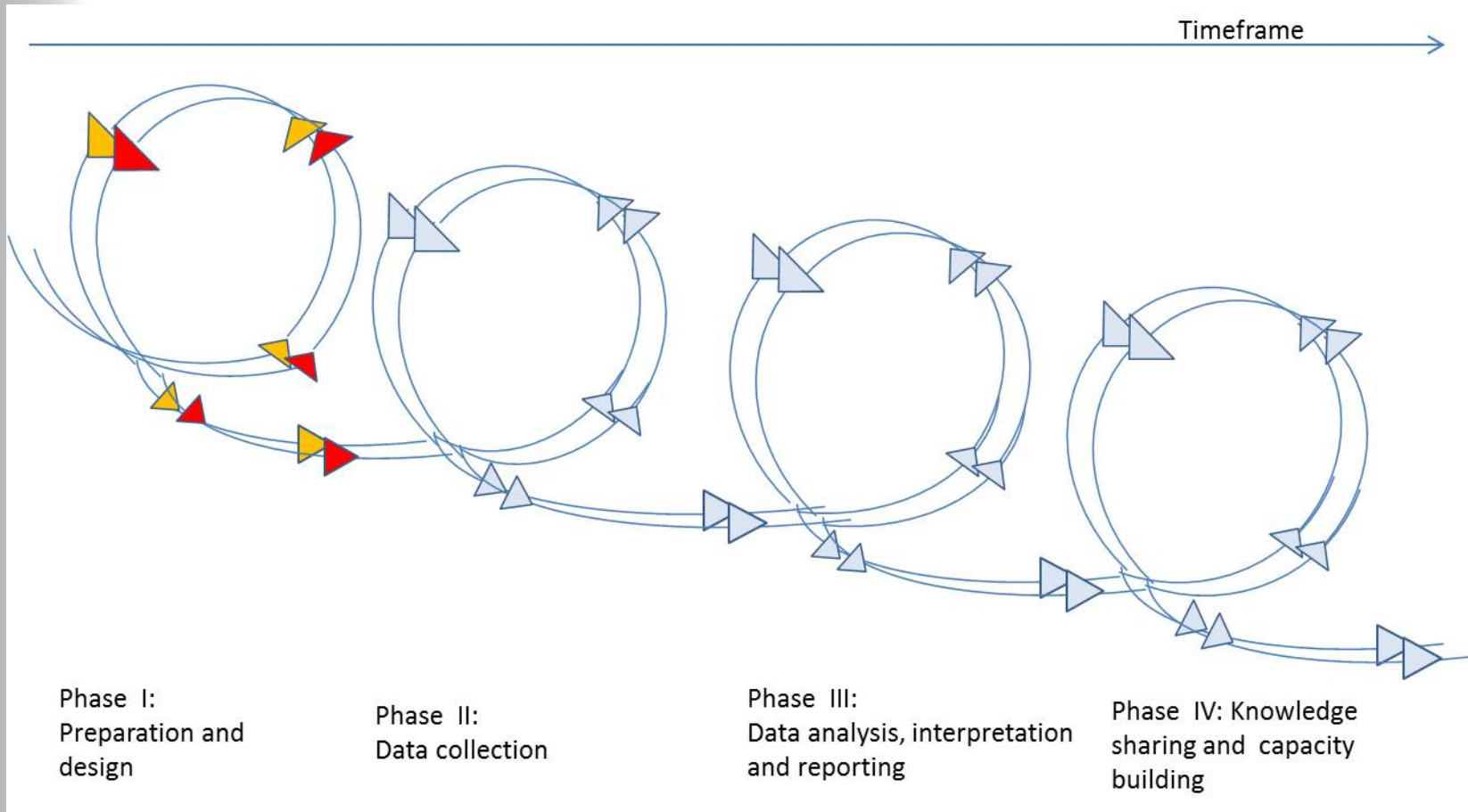
Part B
Practitioner Approach

Chapter 5

EVALUATION PREPARATION AND DESIGN

Key elements:

- Systemic theory of change

- Ethics

- Validity and rigor

- Transdisciplinary mixed methods

- Capacity development

- Attributes and competencies

Timeframe

Phase I:
Preparation and
design

Phase II:
Data collection

Phase III:
Data analysis, interpretation
and reporting

Phase IV: Knowledge
sharing and capacity
building

The 'plan, action, reflect' cyclical phases of Inclusive Systemic Evaluation

- First Boundary (Systematic): Build a Boundary Story of the Intervention

- Second Boundary (Systemic): The boundary of your evaluation
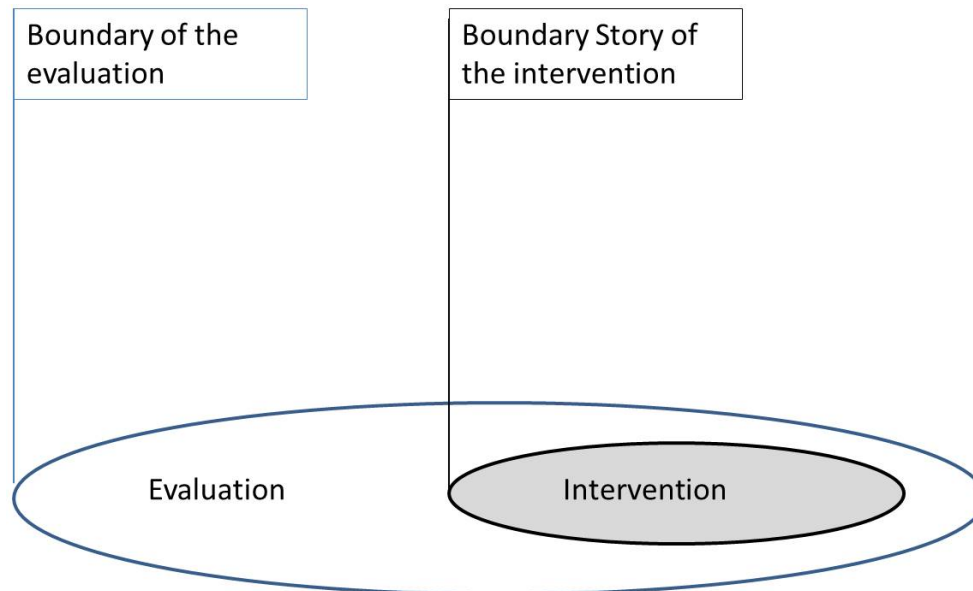
Inclusive Systemic Evaluation for GEMs
Tool 6: ISE4GEMs Planning Tool

Date:
Evaluation Title:
Evaluator/Co-Evaluators
STOC:
Theories of change underpinning the evaluation of change processes throughout the evaluation

1	2	3	4	5	6	7	8	9	10	11
Evaluation purpose, objectives and use	GEM Criteria	Evaluation Key Questions	Evaluation Indicators	Data Collection Methods	Alternative Options	Data Source/s & Stakeholders	Identified Ethical Risks and Safeguards	Data management and storage	Capacity Building Plan & Knowledge Sharing	Timeline & Resources
Why is this evaluation being undertaken? What need will it serve? Who will be interested or able to use it and how? How will it help others and build individual, organizational or state capacity?	On what basis are these GEMs dimensions deemed salient?	To what degree are the GEMs dimensions apparent in the Boundary Story and evaluable?	M&E framework or adapted from external sources?	interdisciplinary mixed methods to integrate different data sets examine the: • Cause marginalization, gender inequality and damage to environments, as well as • Produce locally defined, beneficial improvements and social change			Review of Step 2 and ethics protocols and develop safeguard strategies	How is data and associated materials will be managed, stored, documented and secured?	Anticipating knowledge and capturing emergent outcomes	Feasibility, resources and time fames

Chapter 6
DATA COLLECTION

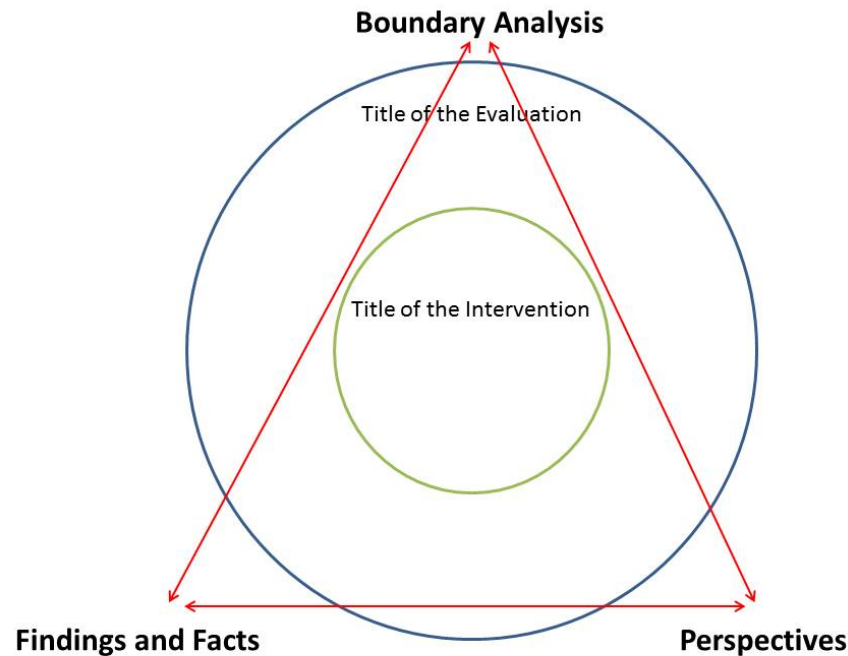- Cycles of data collection

- Multiple boundaries stories

- Transdisciplinary mixed methods

- Capturing and addressing emergent issues
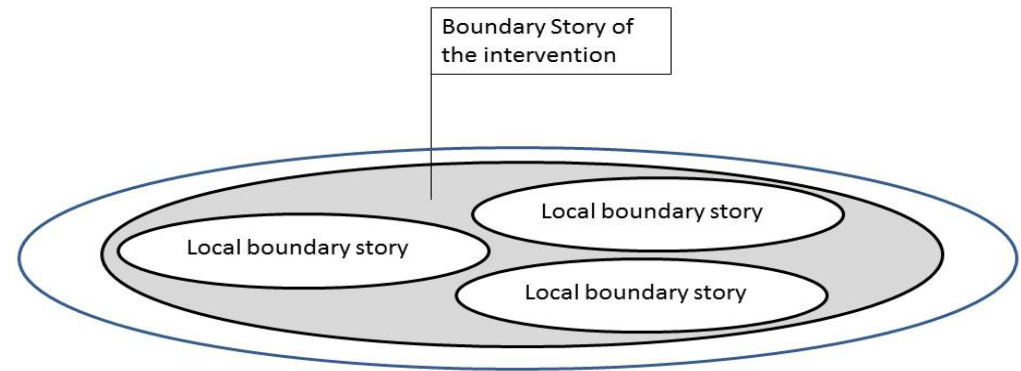
Chapter 7
DATA ANALYSIS, INTERPRETATION AND REPORTING

- Systemic Triangulation
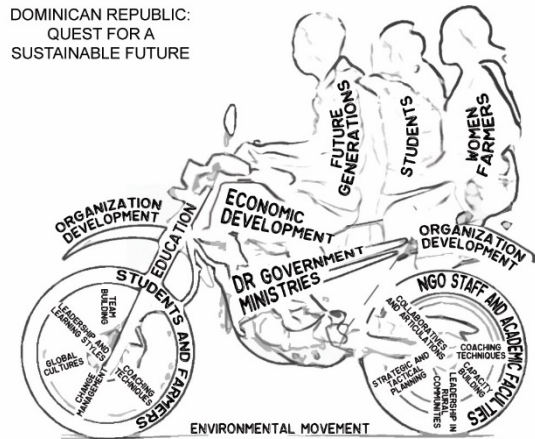
- Systemic Theory of Change

Chapter 8

CAPACITY DEVELOPMENT FOR SOCIAL CHANGE

- Capacity development

- Communicating Results

- Knowledge sharing

DOMINICAN REPUBLIC: QUEST FOR A SUSTAINABLE FUTURE

GLOSSARY ISE4GEMs TOOLS (11 TOOLS)

Use of ISE4GEMs

- Evaluation of Cultural Sustainability (UNESCO)

- Corporate Evaluation of WLPP (UN Women)

- Evaluation of Mayan Traditions Foundation (Guatemala - 3F Funding)

- Article in Tavistock Institute Journal 'Evaluation'

- Inclusive Systemic Thinking Book with Routledge (2019)

- Community Rangers Programme (RRRC PNG, TBC)

- World Vision (Australia)

- International Women's Development Agency (IWDA) (Australia)

- Global Challenge Research Fund – Positive Peace (UK & Global Partners)

- Keynote Speech – International Society of Systems Sciences (2017)

- AEA, EES, ASA Evaluation Conference Presentations (2016-2017)

- American Society of Anesthesiologists (USA – 2018)

- Australian Research Council – ISE4GEMs for domestic violence prevention effectiveness study (Australia)

- IEO Comments

- Copy-editing and online design

- Dissemination and roll-out

- Funding for printing and translation

Ours

- What worked well?

- What would you do differently?

- **EES Form**

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