THE EVALUATION TEAM AS AN ADAPTIVE SYSTEM: THE LEARNING CIRCLE STORY

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ACKNOWLEDGEMENTS

RESEARCH TEAM

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"…the relevance of systems thinking and complexity transcend personal experience and go to the heart of how evaluation is understood, organized and conducted."

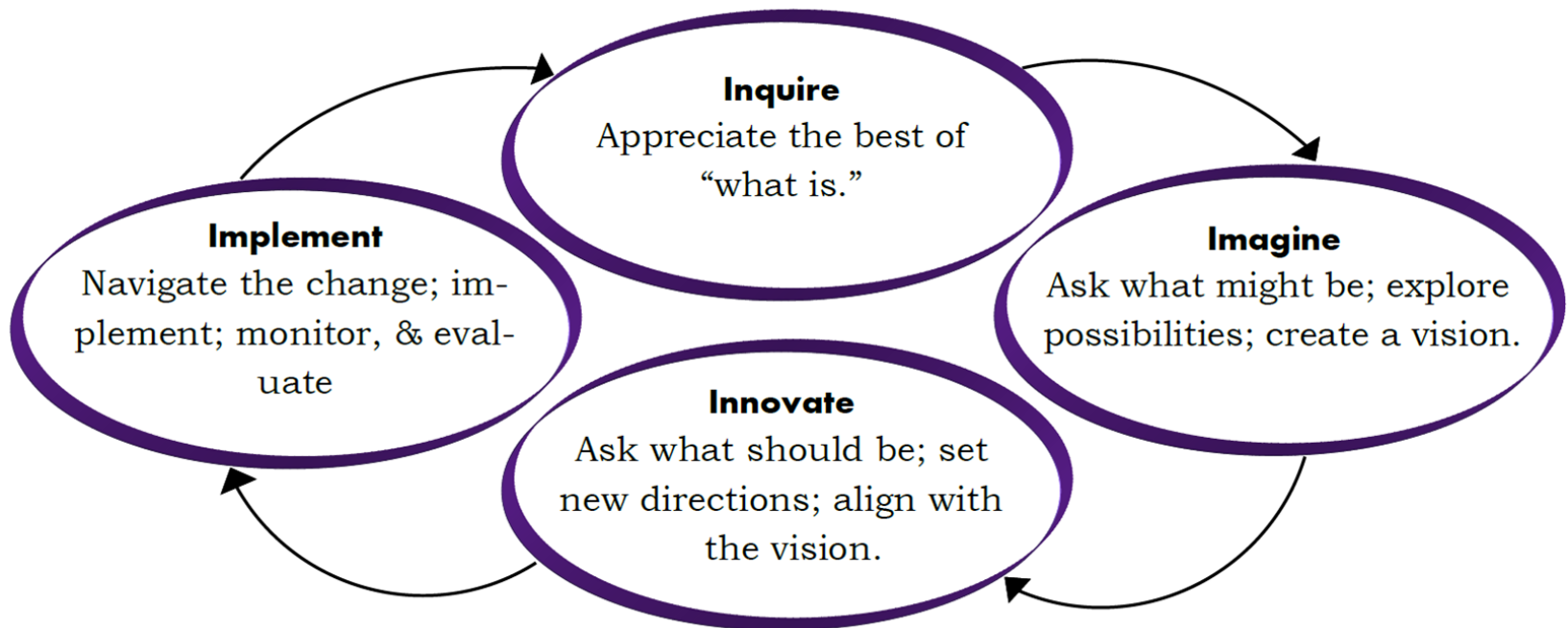Patton, 2011

COMPLEXITY THEORY

1. **Nonlinearity**—small actions can stimulate large reactions

2. **Emergence**—patterns of interaction emerge from self-organization & cohere into a whole that is larger than the parts; a system can be turbulent & coherent at the same time

3. **Adaptation**—interactive elements respond & adapt to each other & to their environment. What emerges is a function of the ongoing adaptation among interacting elements & the relationships agents have with their environment. The act of playing the game changes the rules.

4. **Uncertainty**—emergent & adaptive self-organizations can create unpredictable, uncontrollable & unknowable conditions & interactions. Not dealing with uncertainty & unexpected events makes things worse.

5. **Co-evolutionary**—as interacting, adaptive agents self-organize, connections emerge that evolve within & as part of the whole system.

(Patton, 2016)

APPRECIATIVE INQUIRY

AI is a form of action research that attempts to create new theories/ideas/images that aide in the developmental change of a system.
Cooperrider & Srivastva, 1987

Inquire
Appreciate the best of "what is."

Implement
Navigate the change; implement; monitor, & evaluate

Imagine
Ask what might be; explore possibilities; create a vision.

Innovate
Ask what should be; set new directions; align with the vision.

Model adapted from Preskill and Catsambas (2006)

LEARNING CIRCLES

- A capacity-building activity, 6-8 participants + facilitator, 1 hour/month in the workplace

- Collaborative learning model (Brookfield, 1986)

  - Voluntary participation

  - Mutual respect

  - Collaboration

  - Critical reflection

  - Self-direction

- Experiential learning (Kolb 1984)

  - **Concrete Experience** of practitioners shared

  - **Reflection** on that experience by the group

  - **Abstract Conceptualization** to generalize about that experience & to explore alternatives

  - **Active Experimentation** to modify the next similar experience

- Topics of mutual interest related to a broader organizational objective

- Focus on **practice change**

OUR STORY
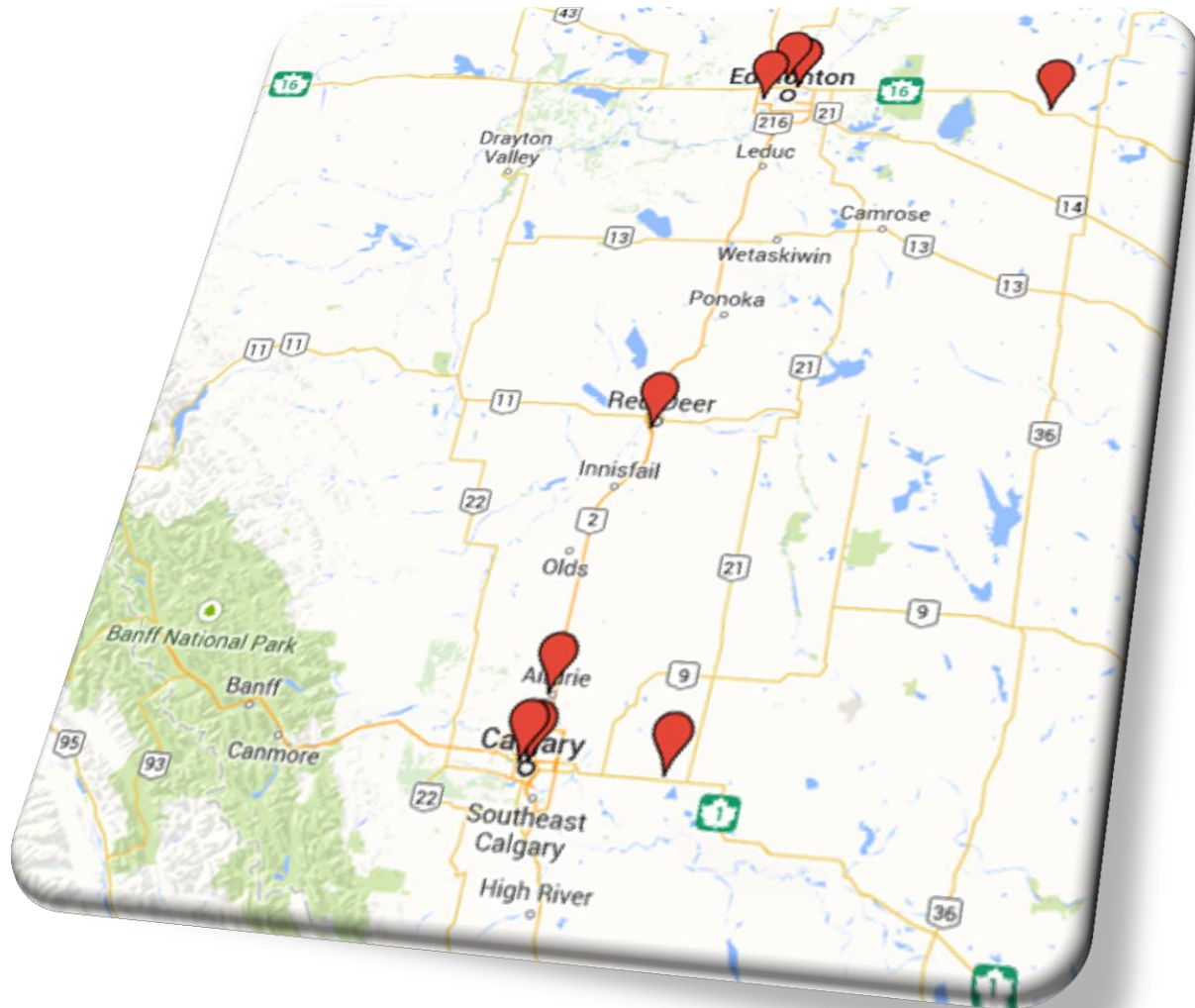
PROJECT COMPLEXITY

- 8 Continuing care facilities
- 9 Learning circles
- 9 Case studies
- 12 Evaluation tools
- 14 Coaching journals
- 15 Site visits
- 15 Focus groups
- 16 Interviews
- 53 Tracking sheets
- 81 Self-assessment questionnaires

TEAM COMPLEXITY

- 1 Project Manager

- 1 Evaluation Consultant

- 2 Principal Investigators

- 2 Research Assistants

- 2 Locations for staff

- 9 Knowledge Users on Stakeholder Committee

TEAM PROCESS

- AI philosophy was pervasive; unconsciously, we mirrored it.
- We used the strengths of each team member
  - Understanding of the continuing care environment
  - Facilitation skills
  - Adult learning & health education knowledge
  - Evaluation expertise
  - Administrative connections
- Our weekly conference calls & monthly status reports allowed for quick action
- Team members supported & respected each other's ideas
- Decision making was inclusive
- We accommodated change as it occurred

EVALUATION TEAM PROCESS

- The logic model was an organizing framework for analysis but remained fluid.

- Study tools emerged as the team gained project knowledge & were tailored to individual sites.

- The diverse data sets were coded, themed, linked by research questions, and complied into comprehensive workbooks.

- Workbooks were the main resource for team discussion in a day-long data analysis workshop:
  - Large & small group discussions to analyze data
  - Taped & transcribed our comments
  - Transcripts validated, summarized, incorporated into draft findings

- Emergent conclusions were validated by site sponsors and learning circle facilitators in a 1/2 day workshop.

- Draft recommendations were also workshopped by the team using a policy checklist.

THE ADAPTIVE EVALUATION TEAM

- Responds to complexity & change

- Positive attitudes pervasive among participants, researchers & evaluators

- Produced strong data, toolkit, case studies & final report

- Has great utility in the field; the learning circle concept is expanding

- Evaluation processes are already being adapted for other studies

- Great chemistry continues!

Learning Circles: An Alternative Learning Model for Front-line Staff in Continuing Care.

King, S., Friesen, S., McLeod, D., Barrington, G.V., Woodhead Lyons, S., Li, T., Moquin, H.

Canadian Association for Gerontology conference.

Calgary, AB.

October 25, 2015.

Using developmental evaluation in health service research: A collaborative approach to qualitative data analysis.

Barrington, G. V., Friesen, S., Woodhead Lyons, S., King, S.

International Institute for Qualitative Methodology conference.

Glasgow, United Kingdom.

May, 2016.

CONCLUSIONS

When the evaluation team acts as an adaptive system, you can effectively address the complexities inherent in dynamic, interactive and changing program environments.

This approach enhances the richness of findings and the depth of study implications.

It also supports team professional development and person growth.

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Thanks for listening!

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