

CHAPTER SIX

Rigorous HUMILITY: Measuring and evaluating the real work of social change

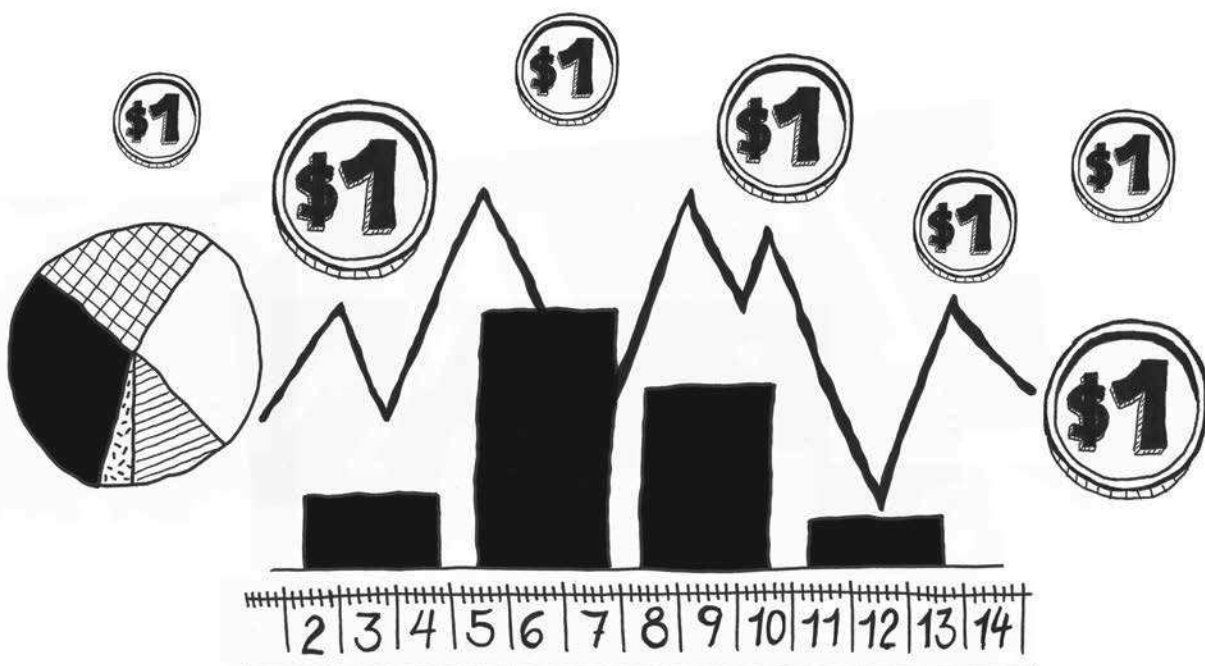
"The instruments for the quest of truth are as simple as they are difficult. They may appear quite impossible to an arrogant person, and quite possible to an innocent child. The seeker after truth should be humbler than the dust...Only then, and not until then, will he have a glimpse of the truth."

– Gandhi

Social change can happen without money. Or social change activists may decide to spend their own money or ask for money from their community. But nowadays social change is often funded by organisations and individuals who are not part of the social change themselves. It is funded by governments, foundations, trusts and other grant-making entities that seek to support and promote social change to address injustice, poverty and inequality. The demand for the resources of these grant-making bodies is high – how do they choose between one social change process and another?

The employees of the grant-making bodies are accountable to the people whose money it is. Government agencies who give grants are accountable to

taxpayers. Organisations which raise funds from the public are accountable to those who give donations. These bodies therefore have to prove that the money they are giving is actually making a difference and that things are getting better because of it. How do they do this? Do they measure? Or rather, they ask the people and organisations to whom they have given the money to measure. If they are giving to many different organisations and movements working on social change, they prefer it if all of them were counting the same thing – so they can tell the taxpayers, the wealthy donors or the public how many people they have helped or how they have reduced slavery or poverty or sickness or whatever it is that they are working on.



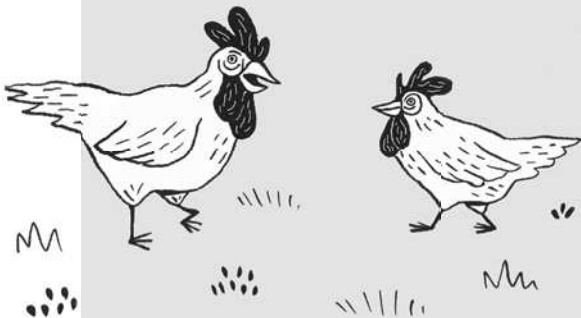
... they are spending too much time measuring and not enough time doing.

This seems reasonable but, because social change is often messy and complex, the people and organisations who are trying to bring about social change find it difficult to provide the information that donors need or get frustrated that the information they are asked for leaves out important elements of what has changed. They find that they are spending too much time measuring and not enough time doing. Being able to demonstrate that you have brought about positive change in people's lives is important, and the process of evaluating what has happened and how, helps us to learn. But too often the processes do not result in learning, and the real work of social change is not understood or documented. How can we change this?

In this chapter we propose a different way of approaching and understanding information about social change and Charlotte Boisteau of the Paris-based evaluation organisation [f3e](http://f3e.asso.fr/) <http://f3e.asso.fr/> explains how external evaluators can help those involved in social change to listen and learn.

Chickens and Paraffin Pumps: Uncertainty and Humility in Measuring Social Change

Jennifer Lentfer



It was seemingly straightforward. We provided a small grant to a youthful and energetic group in Malawi for an income-generating project. They wanted to start a small chicken-rearing business and sell the eggs and offspring to generate revenue for their work.

But the group explained to us in their first report that they had not seen any profit. That was because a “beast” had eaten all of the chickens.

The group now wanted to abandon chicken-rearing in favour of installing a paraffin pump in their community. A paraffin pump is much like a gas or petrol pump used to fill up your car. This one would be used to sell oil for people to light their homes and cook with. According to the group in Malawi, this change in strategy away from the chickens would require much less maintenance and security once it was up and running.

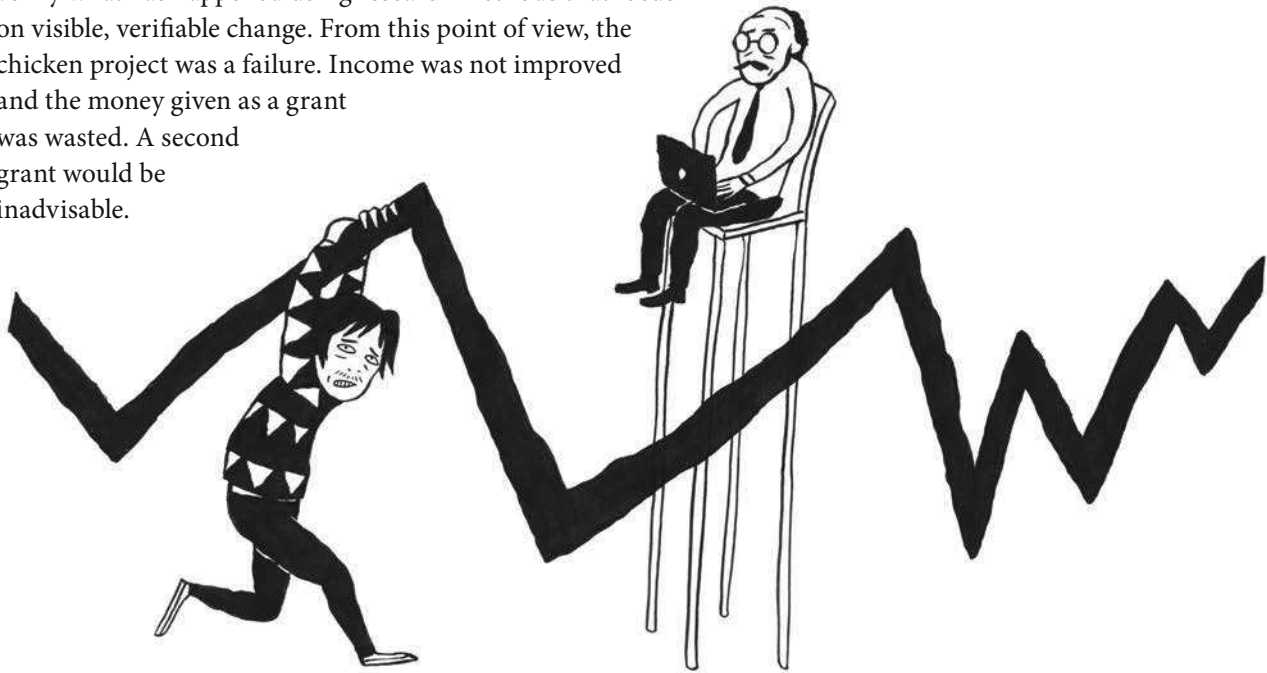
At my desk, far away from the village and with no funds to visit, I was faced with a question – should I fund this group again? What would it take for me to be confident that a paraffin pump would be more successful than the chickens?

More information? Or faith in the group's ability to learn from its experience and assess the context they lived in?



In social change, our work is often focused on unanswered questions. What is social change? Does it necessarily improve the lives of people who are poor? How do we best support local leaders and organizations as strong forces for change in their communities? How can outsiders help in the most effective and sustainable ways? What kinds of beasts live in Malawi and how *does* one get into the chicken coop?

Many of us have observed what some call the growing “data dash” of recent years in the government, international aid, and philanthropic sectors. There is a growing demand for ‘proof’ that things are changing – this often involves a requirement to be able to verify what has happened using research methods that focus on visible, verifiable change. From this point of view, the chicken project was a failure. Income was not improved and the money given as a grant was wasted. A second grant would be inadvisable.



In our experience of working extensively in building the monitoring and evaluation capacity of grassroots organizations in Africa we have found that logframes, abstract metrics, and research frameworks often don't help people understand their relationship to the real work of social change. Rather, local leaders, as members of a community, read real-time trends via observation of what's happening on the ground. This, in turn, drives intuition. They know that this ephemeral life is governed by a multitude of forces.

If we value learning, we might consider that the group has learnt from their mistake. Perhaps they have discovered that protecting chickens from beasts is too costly or not feasible. On the other hand, everyone needs paraffin and there is a demand for somewhere to buy it in the community.

That doesn't mean that we don't ask questions, we do. We might ask what has led them to choose a paraffin pump this time – have they seen it work in another community? Is there no source in the community? It doesn't mean we never use statistics – we might want to look at the cost of transporting paraffin to the community, what they would sell it for and the profit margin. But the purpose is to acknowledge that people have a better knowledge of their own circumstances than we do, and seek to understand the basis of their decisions rather than to assume that a set of statistics will tell us whether the community's choice is right or wrong.

How can outsiders help in the most effective and sustainable ways?

... the purpose is to acknowledge that people have a better knowledge of their own circumstances than we do...

Accountability and social change

Obviously the desire to be accountable in the social good industry is not going away. No one wants to see resources squandered. It's natural for us to look for ways to prevent this.

Some people see evidence-seeking behaviour in a very positive light. To them, social change work will be more effective and less wasteful of resources if it is guided by data and objective decisions. The logic

goes that with more information at our fingertips, we can take stronger steps towards ensuring accountability and value for money. Without measuring our progress, what we are doing is useless.

Some people see the search for evidence in a different light – as tedious, time-consuming, burdensome, and limiting. They see social change as a force beyond logic and predictability. To them, abstract metrics and research design is quite far from the difficult, intimate, and complex factors at play in the real work of social change.

Are these irreconcilable world-views? Or is it our approach to information, rather than the type of information that is important?

In the real work of social change, it is worth exploring the differing worldviews of the thinkers (or the people who make decisions behind their desks, based on the information

before them) and the doers (or those working on the ground, with communities, families, and individuals in their change processes).

There is absolutely nothing wrong with deepening the thinking behind the doing. These labels we have used, “thinkers” and “doers,” are completely artificial. Though many of us will find ourselves more readily identifying with one camp over the other, we definitely need more thinking doers and more doing thinkers. However what we hope we'll discover is that what matters most is *how* the thinking takes place in social change work. What's needed for us all to listen more effectively and become more responsive to those at the forefront of social change?

We need to consider the dangers of an increasing desperation to solve the world's problems using rigorous measurement. Why has quantitative and generalizable information become the “gold standard” by which social change work can be measured? We have seen that the space for possibility shrinks when a person's or an organization's need for certainty or control takes over. Those who make the decisions fear that lack of verifiable evidence will be interpreted as failure and that they will be held responsible. They are afraid to take risks. But, as we have seen in many of the stories in this book, social change can only happen when people take risks. And it is the ability to try things out and learn from our mistakes that enables change to happen.



“... we definitely need more thinking doers and more doing thinkers.”

Can we develop for ourselves a **rigorous humility**? Can we use this idea to remain unsatisfied with disappointing results, and yet begin to embrace the mystery of how social change occurs?

The fear of failure and the valuing of quantitative knowledge over local knowledge and the experiences of the people involved has a real impact on social change.

For social change activists and those working in communities:

Searching for evidence in practice can mean imposing funders' needs on people who are in the process of organizing at local levels. This can be a severe drain on their already-scarce time and resources. Funders' risk-aversion can constrain local leaders' decision-making and responsiveness to communities. Their fear can limit possibilities or the ability to even see possibilities.



Because of the power imbalances inherent in funding relationships, funders can easily distract partners from their mission and constituencies. Do funders adequately consider and analyse the real costs of time and resources devoted to overly-complicated reporting, evaluation, or research exercises? Are funders offering useful capital if lengthy proposals, burdensome reporting, and heavy-handed funding mechanisms get in the way of people doing the social change work they've set out to do?

For funding relationships:

A former administrator of the United States Agency for International Development (USAID), Andrew Natsios, coined the term “obsessive measurement disorder” in 2010 to refer to the rules and reporting requirements that crowd out creative work and create the wrong kind of incentives in the international aid sector. Natsios argues that “obsessive measurement disorder” stifles innovation and leads to a focus on short-term results. Susan Beresford, former president of the Ford Foundation, calls this “evidence disorder” in philanthropy.

Natsios and Beresford are both asking: Where's the room for possibility and innovation if we're always looking for what's wrong? From our own experience in the international aid and philanthropy sector, we can tell you that data-gathering or reporting solely for the purpose of accountability to funders fails time and again to result in improvements at the community level.

“Obsessive measurement disorder” can deepen the inequalities in funding relationships, leading to a lack of trust and understanding between the thinkers and the doers. We have observed that often the search for evidence creates a glass ceiling to prevent the involvement of those who supposedly matter most – those whose lives we are hoping to affect. An over-reliance on generalizable data especially leaves those without a graduate degree behind.

However brilliant the indicators or survey questions, thinkers and doers should both be concerned that “obsessive measurement disorder” may actually be hurting our decision-making processes.

“Where's the room for possibility and innovation if we're always looking for what's wrong?”

For those who work in organisations that support social change:

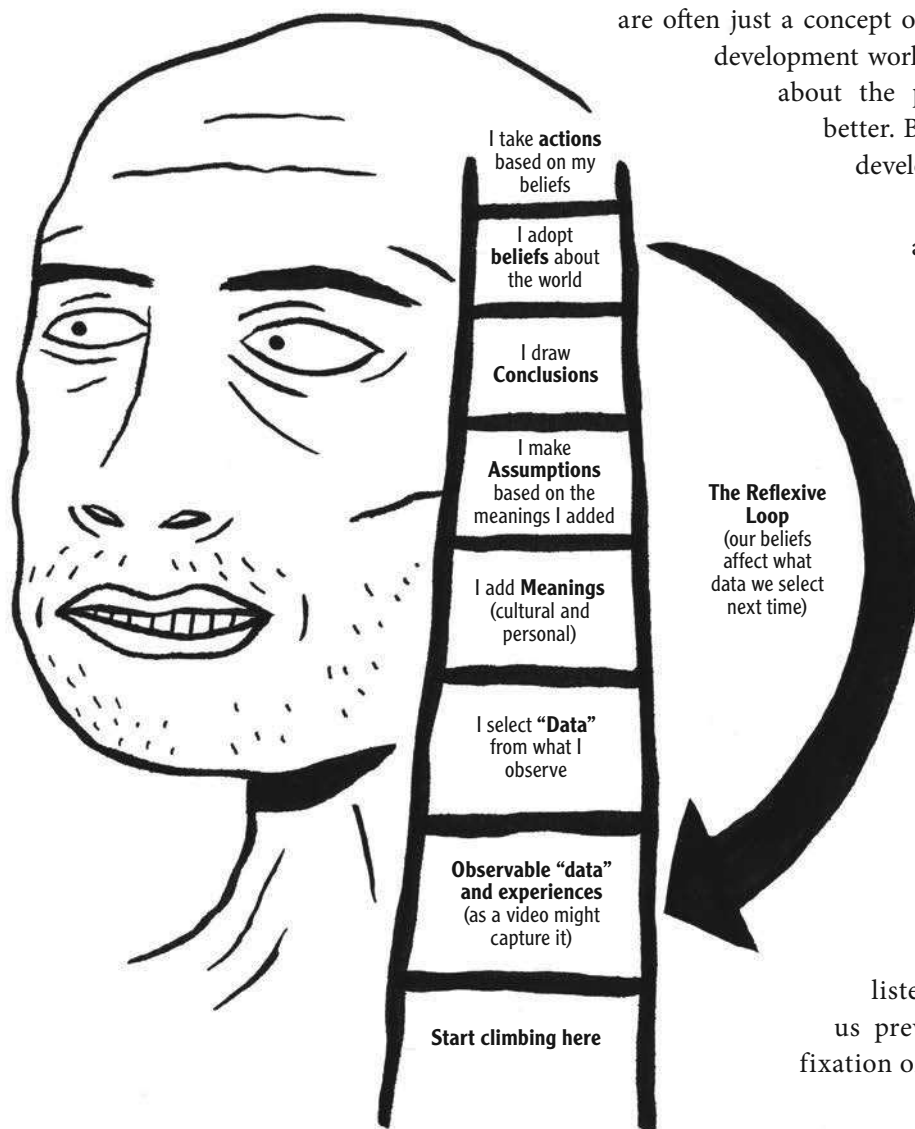
No matter how self-aware we are when we begin work in social change, in the beginning many people will be operating from a worldview in which change in poor or marginalized people's lives is possible with our help. We may believe that change will occur with enough hard work, sound management, and commitment.

The international aid and philanthropy sector tends to be overly technocratic and detached. Because most people are working from their desks in capital cities, ordinary people's lives are often just a concept or an abstraction. Young, idealistic development workers are driven by passion, excited about the possibility of making the world better. But often that desire gets lost as we develop a career.

Without rigorous humility, we can appear less sensitive, hardened, more disconnected, less caring, less open to possibility – qualities that do not make for good partnerships.

Our ability as thinkers to high-mindedly question everything about “what works” can insulate us. It can become a tool of our egos and create a “gotcha mentality.” And it can greatly remove us from the realities of ordinary people. Thinkers and doers, it's in the interest of social change to prevent this and to make sure we're breaking out of our reflexive loops. (See graphic.)

Rigorous humility can help us to listen more effectively. It can also help us prevent and mitigate an unhealthy fixation on evidence and measurement.



What is rigorous humility and how can it help?

As humans, we are drawn to explore, examine, and respond to the world around us. Not surprisingly then, the concept of rigorous humility has its roots in all faith traditions. Rigorous humility is also a key part of the scientific process. It is found in the “searching” for answers in which we are continually engaged.

The most effective and inspiring community leaders, philanthropists, social entrepreneurs, development practitioners, and agents of change embody rigorous humility. They know the limits of their experience and their attitude and actions reflect that they see themselves as only one of *many*. Rigorous humility involves:

- Giving up the role of expert;
- Taking concrete steps to bring power imbalances into check;
- Active engagement in self-reflection; and
- Most importantly, seeing our others' full potential to be capable agents of change, with or without us.

Several things differentiate a person who is rigorously humble.

First, when it comes to evidence and measuring results, rigorously humble people exhibit a **keen awareness of where they are positioned within the information supply chain**. They know how this affects what information is available to them. They consider and make their requests of their partners accordingly.

Especially for funders, there are many layers between themselves and where most social change work is happening: at the community level. No matter the organization or program in which you're working, rigorous humility requires that we consider what is the appropriate cost and complexity needed for measuring results. Does a US\$5,000 project need the same kind of evaluation as a US\$500,000 project? Rigorous humility enables us to also consider what is practical and proportionate given the size and scope of our programs.



A couple of years ago I was the Monitoring & Evaluation (M&E) advisor for a regional team at the US-based headquarters of an international organization. There was a big push for project management happening in the organization and so the regional director decided that it would be best to have monthly reports from the projects' implementers. The funding the regional director provided was to sovereign national-level organizations on another continent.

I didn't disagree with him. Yes, more information about activities would be helpful. However the people who reported directly to him, that is, those more connected to the partner organizations, knew that this was an unreasonable request. A LOT of bureaucratic hoops would have to be jumped to make this happen.

As the advisor, I quickly drew up a flowchart that I showed to the regional director. Did he realize that for his request to be fulfilled by volunteers or field officers working on the ground, the report had to pass through eight different levels of approval before it came to him?

No he didn't. He honestly wasn't thinking about that. He told me that he needed to make better financial projections in order to keep funding flowing for the projects. To do this, he told me, he needed more real-time information about what activities were happening and which funds were being spent. Who could argue with this? (Though this M&E advisor was keenly aware we were not even talking about outcomes yet!)

Eventually the team elected me to institute monthly check-ins. These *phone calls* could provide the necessary information to the director. In the process the team also started to improve relationships due to more frequent interactions with the partner organizations.

Jennifer Lentfer

Employing rigorous humility is about embracing and welcoming mystery and continually recreating our work as we learn.

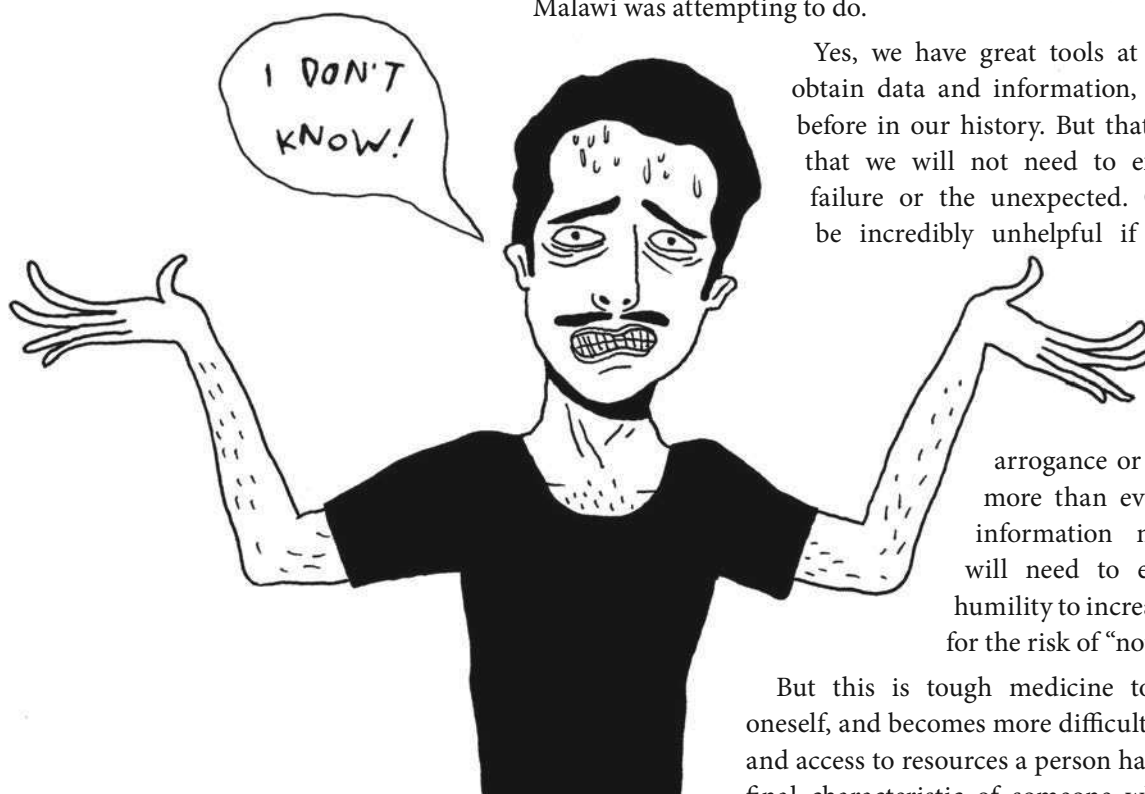
Another way to tell if a person is using rigorous humility is to listen carefully when they speak. You are listening for **one key phrase**.

If someone is using rigorous humility, “I don’t know” is an acceptable answer to a question. This requires something different of us. We must step away from the usual role or position of authority, or people who “know” or are “in the know.” Most of us are unconsciously trying to avoid critique and judgment of our peers. This happens as a result of our education and training, organizational processes, and our own fears.

We don’t want to appear foolish, or indecisive. Why? Because that is a very vulnerable place to be.

But that is not necessarily a bad thing. “I don’t know” is found in imprecise information, in unseen or undetectable outcomes. It’s found in our trust in people, in their innate capacities and energy. “I don’t know” appears when we are grounded in a higher purpose. It is a necessary part of the cycle of rigorous humility.

Even if you are not deciding whether to fund a beast-invaded project, you are engaging in leaps of faith involving “I don’t know.” Employing rigorous humility is about embracing and welcoming mystery and continually recreating our work as we learn. By abandoning chicken rearing in favour of a paraffin pump, this is exactly what the group in Malawi was attempting to do.



Yes, we have great tools at our disposal to obtain data and information, more than ever before in our history. But that does not mean that we will not need to expect or accept failure or the unexpected. Great tools can be incredibly unhelpful if employed with

arrogance or ignorance. Now more than ever, having more information means that we will need to employ rigorous humility to increase our tolerance for the risk of “not knowing.”

But this is tough medicine to administer to oneself, and becomes more difficult the more power and access to resources a person has. That’s why the final characteristic of someone who is rigorously humble is that they **consciously surround themselves with people who offer differing perspectives** – people with different skills, different backgrounds, and/or more years under their belt.

These critical friends are vital because they help us discover our own blind spots, assumptions, and biases. In other words, if you’re a thinker, you need doers around you for a reality check. And for doers, vice versa. Karen Armstrong describes this as the “hard work of compassion,” or constantly “dethroning” yourself to challenge your own worldview. This is a vitally-needed skill set that can help cultivate new kinds of institutions.

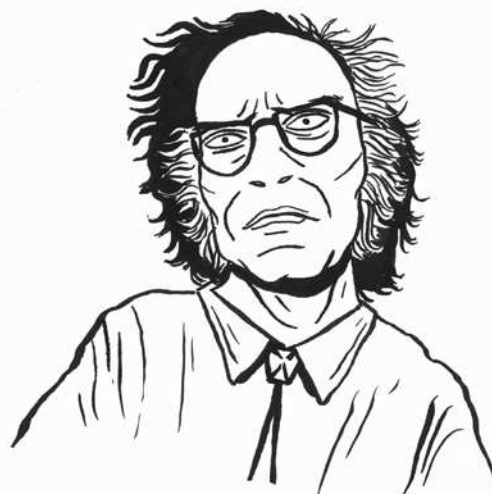
In our lives and in our relationships, it's often the conflicts, the breakdowns, and the mistakes that make us more sure of who we are. These sometimes difficult times are what remind us of our connections to each other, and of what's most important. Those grounded in rigorous humility remind themselves and those around them of this tremendous transformational opportunity.

Here's the bottom line. **Anyone can identify what's wrong. But it takes much more skill and strength to wake up everyday, and help identify what's right, what's possible, and where incremental changes can occur.** This is rigorous humility.

Amazing things can happen with more rigorous humility...

The saddest aspect of life right now is that science gathers knowledge faster than society gathers wisdom.

Isaac Asimov



...We can invest not just in projects or ideas, but invest in the people who have them – those whose expertise and critical thinking is grounded in their day-to-day, lived experience.

...We can expand the notion of accountability to include not just funders, but the people we serve.

...We can use data for learning, adaptation, and improvement, not compliance or risk management or policing.

...We can acknowledge that the information needs of a funder may not be (and usually are not) the same as those working on the ground.

...We can focus on real-time learning and quick adaptation as evidence. Our responsiveness to realities on the ground can be increased.

...We can put just as much or more effort into measuring the strength of our partnerships as we do "following the money trail."

...We can start to see the difference between words on paper and people coming together, willing to be changed by the experience of real dialogue.

...And we can have more fun!

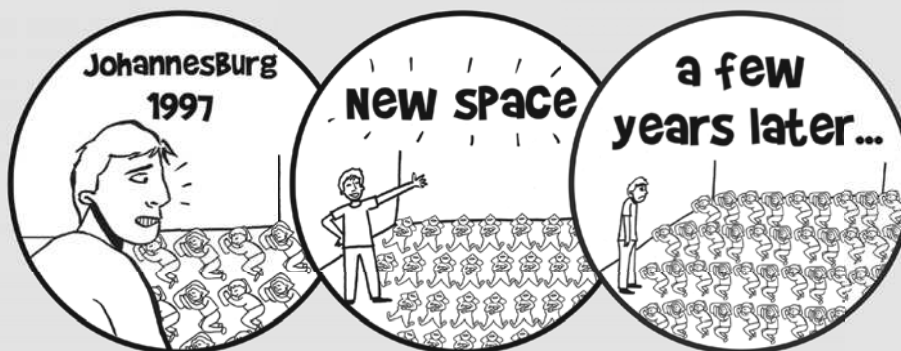


Making evaluation work for social change

Charlotte Boisteau, F3E

Johannesburg, 1997: With parents of the children in the kindergarten where I worked in Alexandra township, we decided to build a new space so the kids (120 in around 30 square meters) wouldn't have to sleep with their legs bent.

A few years later, when I was back visiting, I realised that the director had now enrolled double the number of kids in the same space.



The change I tried to initiate was not positive. In a way, nothing had changed at all.

Since this experience, I have tried to understand what hinders us from making positive changes that endure. I believe that the cause is a lack of depth in our learning processes.

I find myself asking:

- Are we listening enough?
- Are we humble and respectful enough to remain open to the idea of others?
- Are we in too much of a hurry so we act first before thinking?
- Are we ready to improve ourselves or do we consider we are so experienced that we don't have to learn more?

Listening and learning spaces are not easily created and have to be supported. I now accompany people in planning, monitoring and evaluation. I believe there are approaches that can create spaces for listening and learning. If we truly listened in these processes then we would enable learning as well as accountability. Yet these processes are often not perceived in this way. Why?

Well, firstly, because **it is easier to question others than to question oneself.**

Yet deep questioning of our individual and collective practice is the basis of a critical and constructive process which will lead to learning, enabling us to change and adapt. Planning, monitoring and evaluation should be a re-assessment, a continuous improving and learning approach.

The learning process can be validated and deepened if it is supported by an external point of view and accompanied in the methodological process.

The more voluntary the approach is, the better. To accept change, you need to want to change from the beginning.

We also need to accept that we learn more from our mistakes than from our successes, whether on an individual, organisational or structural level.

While it is possible to do this ourselves, within our own organisations, it can be difficult to address and be honest about unequal power relations – between staff and managers, between the organisation and its donors and partners, between ourselves and those whom we are trying to support to bring about social change. Increasingly, we need to work with organisations and entities that are very different from us to bring about change. It takes time to develop relationships of trust and this too can inhibit our ability to plan, monitor and evaluate what we are doing in a way that enables real listening and learning. External accompaniers or evaluators can play a valuable role by maintaining the integrity of the process and enabling all to be heard.

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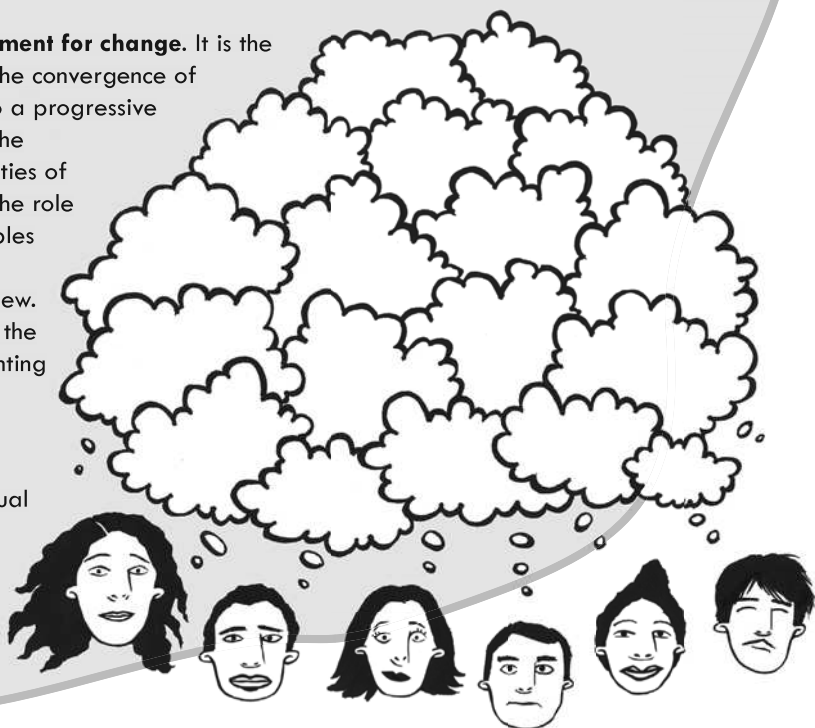
The F3E approach

Evaluation creates a meeting space that can be regarded as a game and, as in all games, there are dominant and dominated personalities. That's why F3E **supports** planning, monitoring and evaluation and research, and defines its role as a supporting, mediating and demanding outsider ("tiers exigeant, médiateur et accompagnateur"-TEMA). The role of a TEMA is to ensure a good balance between the actors in the game. When planning, monitoring and evaluation is not supported, the game is dominated by some actors and its use is perverted. There are a lot of biased evaluation studies.

The support provided by F3E is a key element for change. It is the integrity of the supporting actor that allows the convergence of critical opinions necessary to learning and to a progressive approach. The supporting actor facilitates the identification of the needs and the possibilities of change. This actor is not neutral but plays the role of an analyst, often an opponent that enables a mirror effect. But it is responsible for the objectivity with which it builds its point of view. The supporting actor acts as a guarantor of the good use of the evaluative approach, preventing it from being distorted to meet the needs or wishes of a particular group or individual.

Thus step by step, through people working together, knowledge is built and, beyond individual knowledge, beyond the sum of the parts, a **collective intelligence emerges**.

(F3E is a Paris-based organisation that seeks to evaluate, exchange and illuminate to improve practices in the international development sector.)



Evaluating to understand

Evaluations are not always strategic or innovative. They are sometimes based on a simplistic analytical framework that does not acknowledge complexity of reality.

The analytical framework called the logframe often acts as a straitjacket. By shaping the observations to make them fit in the logframe, you miss the surprises, the unexpected, the hidden aspects of collective intelligence and learning.

Development cannot be summarized – and is not measured – only by the results achieved and their consistency with the expected results. It is a process in which reality and complexity must be appreciated.

Methods and tools for promoting learning and informing evaluative approaches are numerous and becoming more aware of complexity and the richness of social change.

They are called theories of change, incidence mapping, the most significant change, etc. But tools, however nuanced and innovative they may be, can always be misused. The key to learning and evaluation is **your attitude**, or the '**rigorous humility**' we describe above.



Key methodological principles to support the planning, monitoring and evaluation of social change:

1. Acknowledge complexity

Take into account subjectivity

The assessment of change is very subjective. The choice of actors invited to express their view on change is not neutral, as much as for planning or evaluation.

Get rid of linear planning schemes

To support complex change processes, it is useless to plan by asserting "if I do this, this will happen". It is more useful to say something like 'I want this to happen – in similar circumstances, this and this has worked so I'll try these and see what happens'. Or perhaps 'people want to try this, I'm not sure it will work but I will support them to do it and make sure that we check to see whether it is working or not.' The idea is to start with simple tools and a method that would allow a certain degree of uncertainty and allow for unforeseen events rather than using classic planning schemes based on a predetermined model of reality.

Get away from the anxiety to prove our own impact

A change process is the result of a combination of multiple interactions. We can analyze how the action contributed to change, but it is quite difficult, even impossible, to attribute specific actions as the causes of social change. If we are collaborating well, we are more than the sum of our parts so it doesn't make sense to measure what we are doing by measuring the effect of the different parts.

2. Change your evaluation practice

Focus on the system rather than the project

We usually look at our project to assess its impact. But we have to do the opposite. If we accept the idea that our action only contributes to change in a complex system, rather than being the single cause, we need to look at the system. We should first analyse the system that produces the change, and then make the link with our own project.

Focus on learning and capacity building

Planning, monitoring and evaluation exercises should be designed as opportunities to strengthen capacities.

Report differently

Report to actors who were involved in and affected by the change as well as to donors, in order to explain what you are doing and why.

Reform yourself

Supporting change implies changing your own practice by agreeing to take the control from the project management and hand it over to those who are acting to bring about change. Supporting the development of the social change actors leads invariably to your own development.

You have to accept and anticipate this.

From Sierra A. et al. (2014)



In evaluation, the core issue is to take your time, to **create a space-time continuum for reflection and continuous improvement**. It does not mean that you have to create change directly, but that you have to observe the changes created and to appreciate their complexity.

Evaluative approaches are only tools that allow each of us individually, collectively, institutionally (and it is crucial to act on these three levels at the same time) to strengthen ourselves and our processes, and to correct ourselves or to redirect our efforts if necessary.

It is difficult and perhaps even wrong to attribute change to a single individual or a single organisation. On the other hand, it is possible and desirable to support change and its contributors in identifying a change that has occurred and in understanding how it came about.

... why it is essential to try and understand how the action makes sense for those who are expected to benefit from social change.

Positioning social change actors at the heart of evaluation

The question of actors is at the heart of the challenges faced by those involved in planning, monitoring and evaluation. Who evaluates and who is assessed? To whom do we talk when we plan, monitor and evaluate? How do we make the process as inclusive and as empowering as possible?

The question of participation and even more the question of the **governance of the evaluation** is a major issue in the evaluative process and is crucial to the smooth implementation and good use of the evaluation.

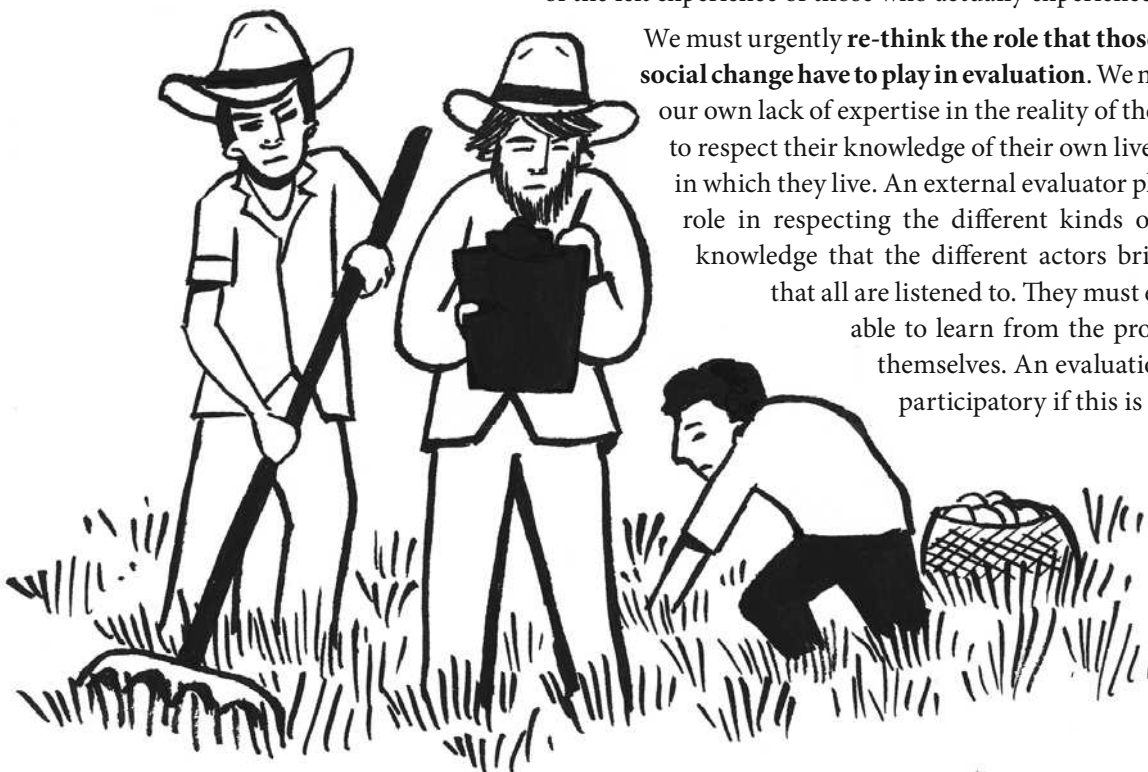
There are a lot of tools that promote participation in the evaluation process, but do we know who we want to participate and why? By involving those who we want to directly benefit from the change, we provide an opportunity for them to both inform our learning and deepen their own learning. The more we involve them, **the more the learning benefits them rather than our own operations**. Until then, the action is more important than the actors.

Actions and the changes that result from them are perceived differently by different people, depending on their involvement, their status and a whole variety of other factors. That is why it is essential **to try and understand how the action makes sense for those who are expected to benefit from social change**.

Evaluation is often motivated by the notion of accountability but, as strange as it may be, we often do not report to the beneficiaries for our actions. We are more accountable to our donors.

This is the more negative aspect that the logframe approach brought: the relegation of beneficiaries to the end of the chain and a weakened ambition to reach them. And an approach to evaluation that is sceptical of the felt experience of those who actually experience the change.

We must urgently **re-think the role that those who experience social change have to play in evaluation**. We must acknowledge our own lack of expertise in the reality of their lives and learn to respect their knowledge of their own lives and the context in which they live. An external evaluator plays an important role in respecting the different kinds of and sources of knowledge that the different actors bring and ensuring that all are listened to. They must ensure that all are able to learn from the process and apply it themselves. An evaluation process is only participatory if this is able to happen.



Capitalisation: making the most out of evaluations

Because external evaluations have their own budget line and are seen as independent and unbiased, they are often treated separately from the learning that is going on within the organisation or project itself. But unless they are part and parcel of the learning processes then they have very little value and the potential to do a lot of harm. Fearing the negative reaction of donors, organisations are much more likely to take action as a result of recommendations of an external evaluator. They have less trust in their own learning processes.

By strengthening organisational learning processes and linking research, M&E, learning events and making sure they speak to each other, the value of external evaluations can be greatly strengthened. They are not a single event, often taken out of context, but part of the learning practices of the organisation.

The strategy of F3E since 2005 has been to promote a host of studies and methodological procedures to complement external evaluation, **preliminary studies** and **cross-cutting studies**: guided **self-evaluations**, strengthening the systems of **monitoring and evaluation**, **capitalisation of experiences**, **impact studies** and **change analysis** and “**post-evaluation**” support to interrogate and facilitate the implementation of the recommendations of the external evaluation.

In addition, organisations and social movements can strengthen their own learning practices to capitalize on their experience, i.e. to learn as much as possible from their own experience and practice and to apply that to their practice and future activities.



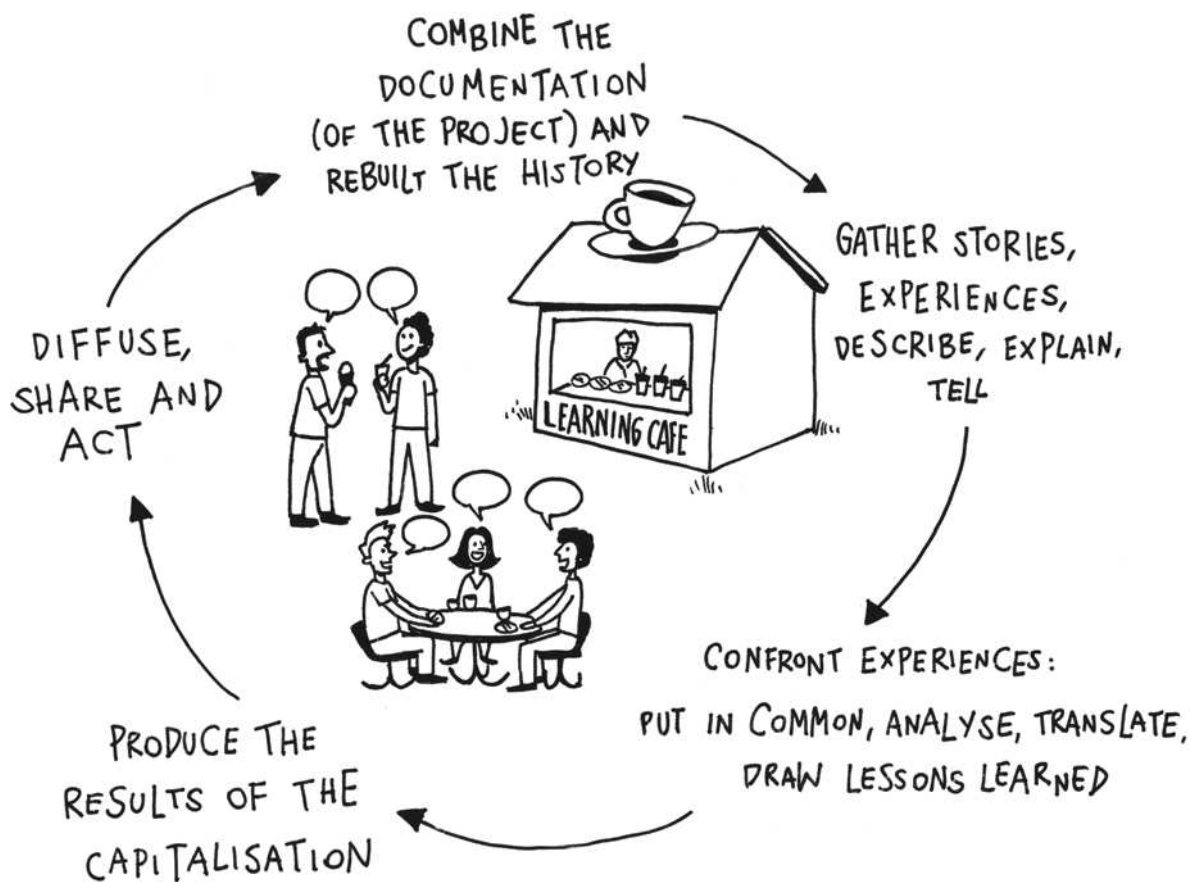
Capitalization: small steps

Creating a culture of learning within your own structure can start modestly. The most important thing is to experiment and find out what works for you.

- Dedicate one hour per month during a management meeting to taking a different look at what you have done. Forget about activities, results and programmes. Discuss experience, feelings and process.
- Identify or develop some simple tools to collect stories: testimonies, photos with comments, an « other comments » section in the monitoring form. Encourage actors to talk or write about the questions that have arisen from them and the unintended effects of activities. These are all low-cost tools to develop a culture of experience and to encourage people to find time to discuss, interpret and draw lessons from experiences.

Adapted from : Capitalisation des expériences: Concevoir et conduire sa capitalisation d'expériences en replaçant les acteurs au cœur de sa démarche Marthe-Valère Feuvrier, Odile Balizet et Audrey Noury, mars 2014.

Where learning is not already built into the work (see how it can be in Julie's story in Chapter 3), then a conscious effort to draw together all the information about the work is needed. You can do this yourself but, in many cases, it helps to have an external person. This person is there to accompany you through the process, to help you understand your own learning and the implications it has for your work. It is a very different way of evaluating your work – not a 3-week process where the evaluator collects information, analyses it and then feeds it back to you with a list of recommendations. It is a longer term process where the accompanier helps you to recognise and value your own learning and analyse the information you have yourself. You decide what the recommendations are. Of course, the accompanier will challenge your assumptions and question your conclusions. But they will not tell you what you have learnt. Only you can know that.



Finally...

There is much more to be said about how best to evaluate social change and how to capitalise on learning opportunities in evaluation. So much to say that we will be devoting a whole Barefoot Guide to evaluation. The fifth Barefoot Guide will explore innovative and reflective approaches to evaluation and how these can support and deepen social change. Massive resources are allocated for evaluations. We want to see these resources being used not just to tick boxes or to prove that we are doing what we said we would, but to deepen our understanding of social change and enable us to improve our practice. We want to see evaluation that is not extractive but contributes to positive social change.

Working with Questions:

What Kinds of Organizations and Leadership do we Need to Face the Future?

"There are respected and good hearted informal leaders in every village I have seen. They have hopes for peace and for restoring the life of their village. If they recognise the same qualities in the community development workers who befriend the village they will enlist our help. They will begin to show us that there is a way forward despite the problems. If we win their respect we will be invited into their company. The changes that they can support are usually quite different from the changes that may be imposed by the district or the commune or the village leader."

Meas Nee, 1999

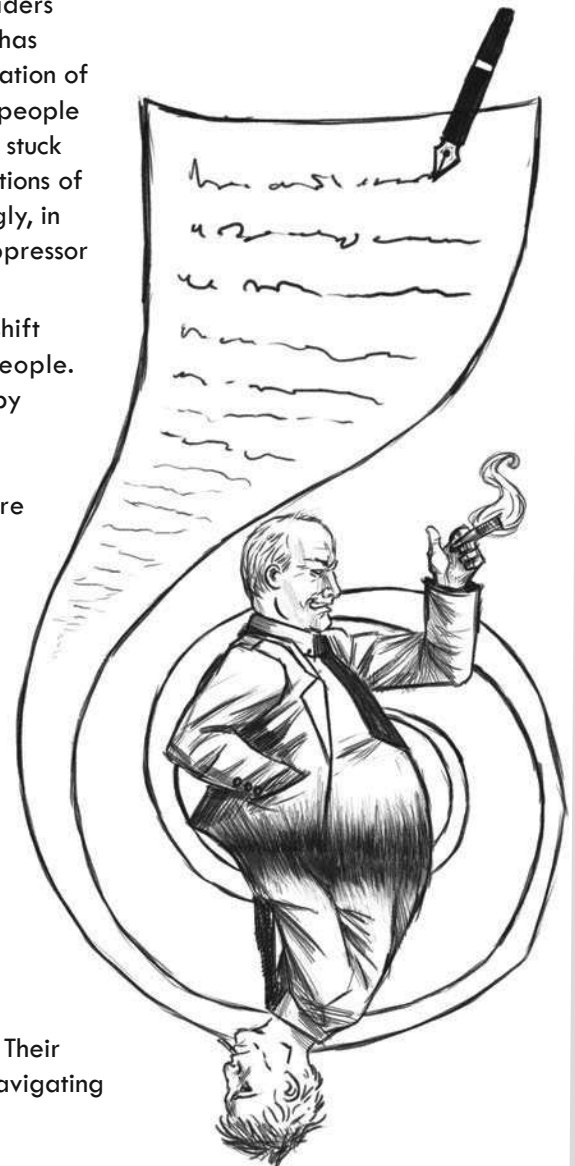
Organisation. In this post-modern age the conventional and traditional hierarchical forms of organization and strong leaders appear to be less and less appropriate. Although this book has addressed itself largely to the empowerment and transformation of the marginalised and oppressed, much the same applies to people and organisations of the powerful, those at the centre, often stuck in their power, and needing to be freed from entrenched notions of their superiority. We are all trapped, wittingly and unwittingly, in this binary of leader and follower, boss and subordinate, oppressor and victim, playing out an old script that needs rewriting.

New organisations need to take account of a massive shift that is taking place in the culture and identity of young people. They are emerging en masse, informed and empowered by education, the TV, and the internet as never before, yet unwilling to meekly follow strong leaders. This has huge implications and challenges for conventional activism where a more politically sussed vanguard have relied on their authority, enabled by a disciplined solidarity in their followers, to manoeuvre and use their followers as a force for change. It seems that young people are simply less willing to be herded around by anyone, more active but less tolerant, *easier to mobilise yet more difficult to organise* than ever before.

How do we work with people who can be mobilised but don't want to be organised?

The world is starting to experiment with less controlling, more participative, less hierarchical, self-organising and networked forms of organization. But these are tentative. What is clear is that they are not so easily held together by formal structure and rules but rather by new kinds of relationships, values, understandings and new conversations. Their ability to be agile and to learn, is a determining factor in navigating an uncertain future.

It seems that young people are simply less willing to be herded around by anyone, more active but less tolerant ...



Working with Questions:

What Kinds of Organizations and Leadership do we Need to Face the Future?

We need to continue to experiment with organisational forms and processes. For example some organisations, including NGOs and professional partnerships, are seeing themselves less as stiff structures and more as rhythmic processes within which diversity is harnessed rather than controlled or minimised. Self-control is the key, lessening the need for management, where individuals take responsibility out of the sense of equality, freedom and solidarity that they experience in the organisation (as discussed in Chapter One) and then find ways to cooperate with other individuals in ways that are best suited to the tasks at hand. The rhythm is provided by regular reflective and replanning reviews, enabling a learning process forward.

... it is through conversations, in meetings and workshops, that leadership, as a process, is taking place.

Leadership

How leaders are brought forward is critical. In the daily savings groups allied to the Shack Dwellers International, leaders are not elected from people who can speak well or show impressive authority. Rather they emerge from a process of women electing collectors from amongst themselves whom they can trust to collect and bank their savings. Trust becomes the key quality. Speaking well and being confident can be learnt. These collectors are then worked with and empowered and many become effective leaders.



But leaders are only one form of leadership. Conventionally they are the dominant form. But increasingly, as people demand participation and joint decision-making, it is through conversations, in meetings and workshops, that leadership, as a process, is taking place. As this grows the role of leaders becomes more facilitative, paying attention to the quality of the learning and creative processes that lead to good decisions made more collectively. This puts Action Learning at the centre of leadership practice.

Leadership can also be claimed by those who work hard and take initiative.

How can we re-imagine leadership, so that the most trusted people and the most creative and effective leading processes, in many possible forms, can be pushed forward to meet the complex and diverse challenges we face?