10 April 2007 John O'Brien

Notes on the Evaluation of Partners in Policymaking[1]

The question of evaluation comes up in at least four ways:

1. Some of our (potential) funders want us to prove that they are getting "value for money" and they want us to demonstrate "outcomes".
2. Partners teaches about the importance of accountability, so we should practice what we preach.
3. We want to learn how to make the Partners experience even better for people. We can do this pretty simply, for example by tabulating each session's participant reaction sheets, thinking about what the scores mean ("Does the negative evaluation that some people made of this speaker on inclusive education mean that we should look for a different speaker or is this part of some participants' working through an issue that is hard for them?"), and adjusting what we do next or next time. Or we could invest more by framing an evaluative question that we think has high leverage for improving what we do and figuring out a way to discover useful answers and test different ways. ("What do different participants hear in the presentations about inclusive education and how might we better support people's ways of working through the issues?").
4. Partners needs a way to assure that participants are getting a genuine Partners experience, not a watered down imitation. This is a matter for the continuing conversation about standards among Partner's coordinators.

These notes focus mostly on the first and second questions.

Partners needs to maintain its integrity. Some approaches to evaluation have a good chance to keep Partner's identity clear and strong; others might blur or con-

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[1] These notes are based on a question –how to evaluate Partners?– posed by Jayne Myers, of Partners in Policy Making (Eastern Region) and explored in a daylong meeting of Partners graduates in Cambridge on 26 February 2007. The meeting was hosted by Jo Hough and recorded in detail by Alan Tyne. These notes are my contribution to a continuing discussion; others involved in the discussion have their own views and may not agree with what I say here.

fuse Partner's identity. These notes express my opinion about an approach to evaluation that poses as little threat as possible to the integrity of Partners.

Having an opinion about a way to evaluate that does least harm is not the same as endorsing the demand for evaluation. Those responsible for Partners need to carefully weigh the costs of evaluation and consider the alternative of refusing or substantially re-negotiating some demands for evaluation – especially demands to produce evidence of outcomes in terms defined by an external body.

Costs and risks to minimize

There are at least four costs and related risks to consider in deciding how much to invest and what kind of evaluation to invest in.

It takes **time** to develop methods, collect, and make sense of evaluation information. Time for evaluation competes with other activities in coordinators already full schedules. Outsourcing this work to research consultants or graduate students might reduce the time demand on coordinators, but specialists in evaluation may not know much about Partners and, if evaluation is going to improve the way Partners is delivered, coordinators will still have to take time to consider the findings.

It's important to avoid **tampering**: well-intentioned efforts to improve that draw people away from what makes Partners work. Partners does not work for every participant, at least not immediately and especially when coordinators are trying hard to reach out to people who have not usually had the opportunities it offers, but its ways of doing things have been refined over years by many practitioners. Decisions about what to do with evaluation information must be carefully considered by people with a deep understanding of what is necessary to Partners and what can be changed without compromising the Partner's experience. Probably the best safeguard against tampering is active involvement in a strong community of practice with other Partners coordinators.

It might be good if there were a "Partners-ometer" that worked like a thermometer, producing accurate information by just hanging quietly on the wall. But there can be no such thing. All evaluation of human action is, to some degree, **intrusive**. It influences people's experience of Partners. If formal evaluation is to be done, the challenge is to find an evaluation method that respects people's autonomy and increases the chances that people will strengthen their ties to the network. Measures and methods that give people a sense that they and their fellow participants are being judged to pass or fail some sort of external standard are undesirable.

Evaluation results, which necessarily record outcomes at a particular moment, could **discredit** partners if people decided that Partners doesn't work because it doesn't produce the outcomes *they* want. This makes it important for Partners to stay in charge of defining the outcomes for which it can be accountable.

Defining outcomes

It is, of course, legitimate for a funder to say what it wishes to buy. And, often it is possible to arrive at a workable understanding of how an investment in Partners will contribute to a funder's objective. It's a danger sign if a potential funder wants to impose its outcomes and its ways of measuring them, This calls for honest negotiation to either arrive at a way to satisfy the funder that is not too costly in time, does not distort what's essential to Partners, is minimally intrusive, and is likely to be within Partner's power to deliver.

This is one way to think about Partner's outcomes (not one that will sit well with people who want to reduce everything to simple numbers, but one that is worth asserting all the same).

Partners is fundamentally a network of relationships among people who identify one another as having common cause and a claim on one another's support as they work to improve life chances for disabled people in ways that make sense to them. The Partners course is a way to invite people to choose a personally meaningful way to join with, draw on, and contribute to those relationships.

Individually and together, partners are on a life-long journey of discovering how to live well with disability. Participants in a Partners course join at different stages of this journey, use the course to move along as they can, and continue to develop through the ups and downs that life brings during and after the course. Desirable outcomes will be different for different participants.

Most of the "outcomes" that people experience at any point in their journey depend in important ways on the state of the local system. One parent may find it easy to use information from the course to upgrade her daughter's Statement and get vastly improved classroom support; the partner sitting next to her may find himself embroiled in a heart-breaking conflict when he tries to use the same information in a different school. It is worse than meaningless to score the first situation as a "good outcome" for Partners and the second as "no outcome." Even outcomes like taking a seat on a Partnership Board are contingent on much besides Partners: a person may join a Partnership Board and find a satisfying, if challenging, forum to advance his views and influence local improvements; the person next to him may be equally prepared and confident but quit her Board because she experiences her Partnership Board as unwelcoming, unwilling to make reasonable adjustments, and ineffective. It is worse than meaningless to score the first experience as positive for Partners and the second as negative. Evaluation of this sort produces far better information about the state of the system than about the effectiveness of Partners.

One possible approach

A helpful approach to evaluation will respect and reinforce Partner's identity, strengthen what works, and intrude as little as possible into participant's becoming active members of the Partner's network. It will draw on, and possibly even deepen, one of Partner's greatest assets: sharing the evolving life stories of participants and their families. It claims that the best way to track the outcome of a Partner's course is to collect and reflect on participant's stories of what has happened because of their involvement with partners. Reflection is focused on the question of how Partners can do more to communicate and encourage what graduates have found that works.[2]

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[2] One credible theory and structure for this approach to evaluation and organizational development is called **Appreciative Inquiry**. To learn more, go to http://appreciativeinquiry.case.edu/. A good, brief introduction, which describes a process for moving from the lessons from stories to plans for improvement, is David Cooperrider & Diana Whitney (2005). *Appreciative inquiry*. San Francisco: Berrette-Koehler. A more technical description of the use of Appreciative Inquiry is in Hallie Preskill & Tessie Tzavaras Catsambas (2006), *Reframing evaluation through appreciative inquiry*. This approach may not seem good to people who understand evaluation as producing objective measurements expressed in numbers that can be analyzed.

Because a good course will engage people at different places on their life journeys and offer them many options for positive action, an effective Partner's course will generate a wide variety of different stories, stories that do not converge on a single theme for action or fit a simple scoring system. However, the stories from a good Partner's course will have common threads. Here are just a few of those possible threads, based on a listening to a focus group of nine graduates discuss what has happened because they participated in Partners

Participants who have benefited most from a Partners course will tell stories about taking an active part in efforts to improve life. These efforts may be focused on making life better for themselves or a family member (getting a direct payment) or on making life better for many people (setting up a local pathway for people with disabilities to take part in sport). For some people these will be stories of moving from passively waiting for services to deliver to taking action; for others the story will be of discovering better informed and more effective ways to continue the actions that brought them to Partners in the first place. Their stories will typically include making use of information gathered on Partner's courses, using contacts made on the Course, and drawing on the support of other participants and course coordinators to gather courage to act, strategize, and deal with set-backs and disappointments.

Different stories will feature people taking up a variety of different roles: some people will have a new, paid or volunteer job; some will have taken a seat as a School Governor, a Partnership Board member, or a committee member; some will have become organizers of local efforts for change; some will be acting as advisors and supporters in the advocacy efforts of friends and acquaintances.

Many stories will reflect a pattern of broader understanding and rising expectations leading to a sense that things as they are must change and a realization that the storyteller herself must work to make the change and that she is not alone in making the effort. Some people will have found themselves dealing with tensions between their vision and what others value; sometimes these tensions will arise with the participant's own friends and family.

These will not always be success stories. Best efforts may not succeed and good results may not last. Systems that talk about openness, consultation and responsiveness may act closed, disinterested and unwilling to meet new demands. There may be defeats and discouragement and moments of isolation and forgetting that there are others who can help. What there will be, when participants have gotten what Partners has to give, is a sense of belonging among people who share a sense of what is important and a willingness to lend support.

Seeking out these stories could remind the people who tell them of the lessons and possibilities available to them because they have been involved in Partners. Reflecting on the variety of stories and what they have to say about what Partners offers could give coordinators useful ideas about how to do more of what works. Finding ways for investors to hear and respond to some of these stories could give a good sense of the value that Partners generates.