

GETTING TO VALUING. CRITICAL SYSTEMS HEURISTICS IN EVALUATION PRACTICE

Workshop Level and Pre-requisites

Intermediate

Evaluation experience of complex interventions

Understand the basics of criteria setting in evaluation

Technical requirements

Flip charts

Flip chart paper

Flip chart pens

Projector

Other materials will be provided by the facilitator

Attendees

No minimum number. Maximum in the range of 16 to 20

Workshop Purpose

Evaluators have frequently debated how to identify and assess value. The recent discussions that surrounded the revised DAC Criteria provide an example of whether evaluation and evaluators should assess value interventions based on fixed or predetermined values or whether these values need to emerge from the intervention or its context.

These issues have been a feature of systemic practice and organisational development for many decades. In the 1980s in the first published book on 'organisational learning', Chris Argyris and Don Schön, outlined how their Action Science methodology distinguished between 'espoused values' and 'values in use'. Within the evaluation field, influential innovations such as Developmental Evaluation, Blue Marble, Footprint Evaluation and Culturally Responsive Evaluation have what criteria should assess the value or worth of an intervention and how those criteria should be identified. Tom Schwandt and Emily Gates in their book, *Evaluating and Valuing in Social Research* (2021), proposed a framework for shifting the focus from evaluating on the basis of predetermined values (ie espoused values) to evaluating interventions after revealing the values demonstrated by the intervention in practice (ie values in use). Their framework is based on the discipline of Critical Systems in general and Critical Systems Heuristics (CSH) in particular.

Critical Systems Heuristics and Evaluation Practice

Critical Systems Heuristics is a set of generic questions (heuristics) that are adapted to specific interventions to reveal espoused and 'in use' values and criteria. It focuses on four sets of decisions that every intervention makes.

1. Motivation (what are we seeking to achieve and who will benefit)
2. Control (who or what controls what is to be done)

3. Knowledge (what expertise is used and what expertise is marginalised when doing it)
4. Legitimacy (on what basis can you claim that what you are doing is the right thing to do)

These value-laden boundary choices profoundly affect the criteria upon which any intervention is considered of significance, merit or worth. They can be deliberated on in an instrumental 'is' mode or a normative 'should' mode, and even more powerfully when those two modes are compared.

Furthermore, since evaluation can be considered an intervention, CSH provides evaluators with the important opportunity of reflecting on the value base *of the evaluation itself*.

Workshop Delivery Methods/Activities

This workshop explores the practical aspect of CSH in designing, implementing and reporting evaluations, and how evaluators can reflect on their own evaluation practice. It has evolved over the past five years through in-person and on-line workshops.

The workshop will be based on a case study, although participants can work on their own example should they wish. However, traditionally CSH is a collaborative endeavour (in practice using multiple stakeholders with multiple perspectives and expertise) so they should be prepared to work in a group rather than on their own. After a short introduction, participants will work progressively through the questions that form the core of CSH.

Workshop Learning Outcomes

By the end of the workshop participants will:

- Aware of the basis of CSH and where it belongs in systemic and evaluation practice

- Know the twelve core heuristics (generic questions) used by CSH and how to adapt them to specific interventions and evaluations

- Have practiced the application of CSH and reflected on its use *in* their own evaluation practice and *on* their own evaluation practice.

The workshop has an inbuilt reflection and evaluation process, based on CSH, that will explore and assess whether these outputs have been achieved.