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*What follows is a **joint abstract** of the symposium to be run Jessica Dart and Dr Patricia Rogers. This joint abstract covers the two papers to be presented in the symposium:*

- The first paper will be submitted separately by Patricia Rogers.
- The second paper is authored by Jessica Dart and is included in this document.

# **Symposium Title: Pushing the Boundaries of Evaluation Through Stories of Evaluation Practice**

**Jessica Dart<sup>1</sup> and Patricia Rogers<sup>2</sup>**

<sup>1</sup>Institute of Land and Food Resources, University of Melbourne, <sup>2</sup> Royal Melbourne Institute of Technology

## **Abstract of Symposium**

In recent years, storytelling has emerged as an important component of organisational learning, and a useful tool for evaluation. This symposium has been designed to introduce participants to some of the techniques involved in generating, collecting and interpreting stories for these purposes. A second purpose is to involve participants in interpreting stories of evaluation practice. To date, stories of evaluation practice, and the wisdom they contain, have generally been only shared informally. Yet there is evidence from other disciplines and professions (such as ethnography (van Maanen, 1988) and social work (Fook, 1996) that stories of practice have an important role to play in building theory and improving practice. At their best, stories are memorable and engage our emotions and beliefs, as well as our intellect. They can therefore set puzzles for the development of theory, and set examples to guide the development of practice.

Organisational researchers have discussed the value of studying storytelling within organisations as part of understanding sensemaking. Sensemaking, as the name implies, is about making sense of a situation or event. Weick, one of the most widely cited authors in this field, suggests that the central questions for people interested in sensemaking are how they (the agents) construct what they construct, why and with what effects (1995). (Louis 1980) suggests that sensemaking is a process that uses retrospective accounts to explain surprises and make sense of change.

If storytelling is considered to be an indigenous sensemaking system in organisations, then this medium would seem to be an ideal one to also collectively make sense of impact. Just as staff use stories to make sense of surprises such as someone being fired in a business firm, it has been suggested (Dart, 1999) that the natural storytelling process can be harnessed to help the stakeholders of an evaluation make sense of complex situations that arise whilst evaluating social programs. Storytelling is important in terms of organisational memory as well. Shaw, et. al. (1998) contend that stories are central to human intelligence and memory - that a good story defines relationships, a sequence of events, cause and effect, and a priority among items - and those elements are likely to be remembered as a complex whole.

The session will begin with two formal papers: one on the use of stories in evaluation; and one on developing stories of evaluation practice for theory development and practice improvement. A series of stories of evaluation practice will be presented in the symposium. These stories will be drawn from stories currently being gathered by the presenters, and will be presented with the permission of their authors.

Participants in the symposium will then engage in a process to select a number of stories that exemplify the most important challenges in evaluation practice from their own perspective. They will do this by voting for the most significant story from each category (or domain), and will also be asked to explain their criteria for choosing each particular story. The participants will be encouraged to try to reach a consensus on which stories get selected. Discussion about what the stories mean to us normally emerges whilst attempting to reach a consensus. Participants are asked questions such as "which story do we learn the most from and which do we learn the least from?" The session will conclude with a synthesis of the lessons learned from the stories.

This process builds on Jessica Dart's research in testing a novel approach to participatory monitoring and evaluation, which is based on the 'Evolutionary Approach to Organisational Learning'. This approach was developed by Rick Davis (1996).

The stories have been selected to cover a range of issues in evaluation from a variety of perspectives. They include stories of evaluations from the perspective of evaluators, program staff and program consumers. Issues addressed include:

- stakeholder involvement, including the ability of individuals to represent stakeholder groups;
- building commitment of individual staff to evaluation utilization;
- differing definitions of what a successful evaluation looks like;
- relationships between evaluators and others involved in a program.

The session will provide participants with an opportunity to learn about evaluation theory and practice through the presentation, interpretation and discussion of particular stories of evaluation practice. The session will also be used to build knowledge about the types of stories that are useful for theory development and practice improvement. This session builds on an earlier successful session at the 1995 joint AEA/CES Evaluation Conference, held in Vancouver, Canada and at the 1998 AEA Evaluation Conference in Chicago which demonstrated the feasibility of such a session and the importance of a process of dialogue between narrators and their audience and for a structured process to review and interpret stories which have been gathered. The session will be carefully structured to be usefully interactive. Audience members will leave with some vivid examples of evaluation practice to act as guides for future practice, cautionary tales to prevent similar disasters and puzzles to prompt further theory development.

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## **COVER PAGE 2**

**PAPER 2 - TO BE PRESENTED IN SYMPOSIUM: "PUSHING THE BOUNDARIES OF EVALUATION THROUGH STORIES OF EVALUATION PRACTICE" (JESSICA DART AND PATRICIA ROGERS)**

### **Title of Paper 2: Storytelling to Help Practitioners Make Sense of their Program's Impact**

#### **Jessica Dart**

Institute of Land and Food Resources

University of Melbourne

Parkville, Victoria 3052

Ph (03) 9344 8356

Fax (03) 9349 4172

Email: [j.dart@pgrad.unimelb.edu.au](mailto:j.dart@pgrad.unimelb.edu.au)

## **Biographical Summary**

**Name: MS Jessica Dart**

BSc (hons) in Botany

MSc (dist) in Sustainable Agriculture

Postgraduate student studying for a PhD in the Evaluation of Agricultural Extension Projects

Institute of Land and Food Resources, The University of Melbourne

Jessica is an overseas student from the UK, now in her final year of study for PhD at the University of Melbourne. As part of her research she adapted and implemented a novel form of participatory monitoring and evaluation with an agricultural extension project that operates across Victoria. This monitoring systems involves storytelling. Prior to this Jessica worked in India and Mexico for four years. There she was involved in developing systems of participatory evaluation for development projects that aimed to improve the livelihoods of subsistence farmers and their families.

# *Storytelling to Help Practitioners Make Sense of their Program's Impact*

***Jessica Dart***

Institute of Land and Food Resources, The University of Melbourne

## **Introduction**

This symposium is the product of bringing together two emerging areas concerning the use of stories in the practice of program evaluation. In the first paper Patricia Rogers introduces the concept of using stories of evaluation practice to help evaluators improve their own evaluation practice. In this second paper I introduce a participatory methodology for collecting and systematically interpreting stories about program impact. This methodology has previously been used to make sense of program impact during participatory evaluation, but in this symposium some of the elements of the approach will be used provide a systematic and evocative way for sharing stories of our own evaluation practice. This paper describes the background to, and the method of the Story Approach for participatory monitoring and evaluation.

In this paper I discuss the use of stories in program evaluation practice, then outline one approach to participatory monitoring and evaluation (the Story Approach), that is based on the collection and participatory interpretation of stories of significant change. I argue that stories are an ideal medium for practitioners to make sense of the array of program impacts and to make sense of the range of stakeholder values. Lastly, I highlight the potential value of using elements of the Story Approach to turn the mirror on ourselves by sharing stories of our own evaluation practice and interpreting these stories in a systematic way to help us to reflect and improve our practice.

## **The Use of Stories in Conducting Program Evaluation**

Stories are used widely for co-operative inquiry and for discourse analysis, feminist research and cultural studies. In organisational learning literature, stories are valued and studied as the preferred sense-making currency. However, there appears to be little systematic, formal use of stories in program evaluation. Nevertheless, program evaluation frequently involves the collection and interpretation of stakeholder stories to make some decision or other regarding a program. These 'stories' emerge during interviews (often embedded in transcripts) and in written documents such as diaries or open-ended responses to questions. But paradoxically, there is a dearth of literature that *specifically* cites the use of stories for evaluating programs.

A possibility is that the under-use of the term 'story' in program evaluation relates to the dubious value in terms of revealing the 'truth' that storytelling poses. As children we are asked by adults whether we are 'telling stories' – there is an implicit notion in the term 'telling stories' that links it to telling 'fibs'. In addition to truth, accuracy can also be called into question; storytelling can conjure up the vision of the game of 'Chinese whispers': where a story moves around a group of people, constantly changing and being reinterpreted as it passes from mouth to mouth. Understandably, evaluators may question the value of collecting stories told in casual conversation for eliciting factual content, and accurate description of events.

However, stories told in casual conversation can harness another sort of information; they provide insight into how storytellers construct reality, and to what they attach importance. In the organisational learning literature, stories told in casual conversation are recorded and studied by researchers to understand organisational culture (Boje 1991). However, they are not usually used to drive change, or to evaluate the effectiveness of an intervention.

I propose that when the collection of stories is coupled with a process of systematically and collectively interpreting these stories, (including documentation of these interpretations) then storytelling can be effectively harnessed for participatory evaluation. The interpretations themselves tell another story, and the process of collective interpretation can have several beneficial outcomes for evaluation utilization. Through adding the extra step of collectively sharing and interpreting stories of program impact, a whole new dimension to the use of stories in program evaluation is added.

## **So What is a Story?**

Another factor contributing to the lack of use of the term stories in program evaluation literature probably relates to a lack of clarity with regard to what constitutes a story. In the wider literature, stories are frequently defined by their structure. Most scholars treat narratives (or stories) as discrete units, with clear beginnings and endings, as detachable from the surrounding discourse rather than as situated events (Reissman, 1993). In Poetics, Aristotle said that stories have a beginning, middle and end. Since that time there has been general agreement in the literature that sequence is necessary for stories (Polanyi, 1985).

Across the literature, differences between the terms 'story' and 'narrative' are blurred and these terms appear to be exchangeable. There is disagreement about the precise definition of a story or narrative. According to Prince (1973), the simplest story contains three interrelated events, the first and third state a certain situation, while the second is active. The third event depicts a change in the state of affairs as compared to the first event. An example of this type of story is; John was a confident driver, until he was in a crash, then he lost his confidence. However, there is a general agreement that stories are used by the tellers to make sense of a situation. Reissman (1993) suggests the 'story metaphor' emphasises that we create order and construct texts in particular contexts.

## **Lessons About the Value of Stories From the Sensemaking Literature**

Organisational researchers emphasise the value of studying stories told in casual conversation within organisations as part of

understanding sensemaking. Louis, (1980) suggests that sensemaking is a process that uses retrospective accounts to explain surprises and make sense of change. Weick, (1995) one of the most widely cited authors in this field, suggests that the central questions for people interested in sensemaking are how they (the agents) construct what they construct, why and with what effects.



If storytelling is considered to be an indigenous sensemaking system in organisations, then this medium would also seem to be suited to collectively making sense of the impact of program interventions. Just as staff use stories told in casual conversation to make sense of surprises such as someone being fired in a business firm, I suggest that the natural storytelling process can be harnessed in a structured way to help practitioners make sense of the complex nuances of impact and outcomes associated with program intervention.

Storytelling is also important in terms of organisational memory. Shaw et al. (1998) contend that stories are central to human intelligence and memory - that a good story defines relationships, a sequence of events, cause and effect, and a priority among items - and those elements are likely to be remembered as a complex whole. If stories about the impact of interventions can infiltrate the collective memory of an organization, practitioners will gain and retain a more deeply shared understanding of what is being achieved. This could create a common base to enter into dialogue about what is desirable in terms of expected and unexpected impact. Boje, (1991) contends that in complex organizations, part of the reason for storytelling (in casual conversation) is the working out of those differences in the interface of individual and collective memory.

From the literature of storytelling in sensemaking, it appears that there are several insights that could be usefully transferred to help highlight the potential value of using stories for participatory monitoring and evaluation (see Table 1).

*Table 1 Insights from the sensemaking literature with potential for program evaluation*

Insights from Sensemaking literature	Potential for stories in program evaluation
Stories are claimed to be the preferred sensemaking medium in organisations.	<p>Naturally, practitioners tell stories to each other to make sense of what is happening in the field as a result of their practice.</p> <p>This process can be harnessed by sharing these stories as a structured process and can also help practitioners collectively make sense of what is desirable in terms of expected and unexpected impact.</p>
Storytelling in casual conversation is an indigenous way staff in organisations make sense of diversity and complexity. Stories are about meaning; they help explain why things could happen in a certain way. They give order and meaning to events - a crucial aspect of understanding possibilities and opportunities.	<p>The impact of social interventions is often complex, diverse and unpredictable. The impact does not occur within a closed system, and are affected by a whole range of other phenomena. In other words, impact is located within a specific context and is extremely hard to unravel from that context.</p> <p>Storytelling is an indigenous way in which practitioners and evaluators together can make sense of the diversity and complexity of impact.</p>
Stories are claimed to be central to human intelligence and memory. Stories tend to be remembered as a complex whole. Stories have a psychological impact that graphs and equations lack.	<p>If practitioners remember the stories of impact then this has several implications in terms of increased evaluation utilisation as:</p> <p>Practitioners are going about their work with the same stories of success and failure in their heads. Thus these stories infiltrate into the consciousness of the organisation and affect the attitudes and possibly behaviour of the practitioners.</p> <p>Ideally the organisation will move towards doing more of what was highlighted in the success stories, and doing less of what was highlighted in the failure stories. Thus the evaluative information and judgements are used to improve the program.</p>
Stories can convey messages that could be otherwise painful or unacceptable to disclose.	Storytelling can provide a safe space for practitioners to discuss 'the undiscussable' issues such as negative impact and undesirable change.

## **The Story Approach to Monitoring & Evaluation**

The 'story', or 'evolutionary' approach to monitoring and evaluation, is one approach that incorporates the collection and systematic participatory interpretation of stories. It was developed by Rick Davies in Bangladesh in 1994 (Davies, 1996), but as far as I know, had never been formally used in Australia. Davies developed the 'evolutionary approach' as part of his doctoral research that examined the use of evolutionary theory to aid organisational learning. His fieldwork was with a micro-credit project of the Christian Commission for Development in Bangladesh. In 1998, I implemented a modified version of the evolutionary approach (referred to as the Story Approach) with the Target 10 dairy extension project which operates throughout Victoria (Dart, 1999). I considered the Story Approach under a constructivist epistemology that appears to be congruent with the evolutionary perspective as described by Davies (1996), (although he does not explicitly refer to constructivism in his research). Constructivism claims that meaning is constructed by human beings as they engage with the world they are interpreting.

In the Story Approach, program stakeholders interpret their experiences with the program and select instances of significant change

and record each as a story. They are also required to record why this change is significant to them. For example, when a farmer tells a story of significant change, she/he interact with the world and draw meaning from it, and it is in the telling of the story that meaning is constructed. Then when the reviewers read and evaluate the story, they engage with it and construct a further new meaning. When this is done in a group, this construction may be shared. In the Story Approach the criteria that are used to interpret the story are documented, made transparent and attached to the story itself. It is this transparency that makes the whole process even more open to new and more sophisticated constructions of meaning.

The Story Approach, which is a continual monitoring process, has been running across the Target 10 dairy extension project, since June 1998. The trial has revealed how storytelling can help practitioners make sense of impact. I will elaborate this finding after firstly describing the method of the Story Approach.

## **Method of the Story Approach**

There are three main parts to the approach (as practised in the Target 10 dairy extension project):

- Establish domains of change.
- Set in place a process to collect and review stories of change over a 12-month period.
- Conduct a secondary analysis of the stories.

### ***Stage One: Establishing domains of change***

In the first stage of the process, the evaluation audience identifies the ‘domains’ of change that they think need to be monitored at the project level; for example, changes in practice. This process is a discrete activity and need only occur once. The Target 10 project nominated four domains using the Delphi technique. Delphi is a form of interactive (postal) surveying that utilises an iterative questionnaire and feedback and provides participants with an opportunity to revise earlier views based on the response of other participants, until some desired level of consensus is reached. Unlike ‘performance indicators’, these nominated ‘domains’ of change are not precisely defined but are left deliberately fuzzy; and it is initially up to field staff to interpret what they feel is a change belonging to any one of these categories.

### ***Stage Two: Collecting and reviewing the stories of change***

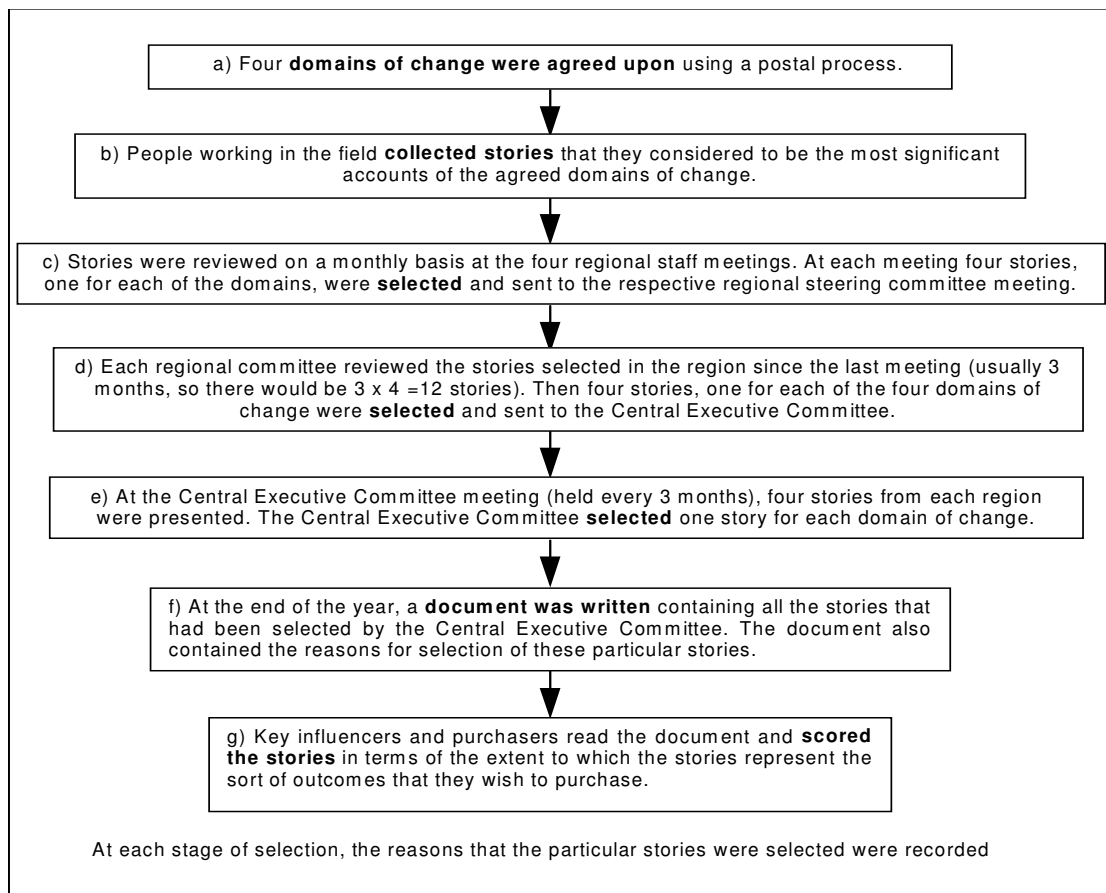
The next stage involves the collection and review of stories of significant change (according to the defined ‘domains’ of change that had been nominated using the Delphi process). The stories are collected by those most directly involved in the project delivery (ie, the beneficiaries themselves and the deliverers). People at each level of the project hierarchy are then involved in reviewing a series of stories and selecting those that they think represent the most significant accounts of change (see Figure 1). The selection of the stories takes the form of an iterative voting process, where several rounds of voting occur until consensus is achieved. At the various review fora, participants are required to document which stories they selected and what criteria they used. This information is then fed back to the storytellers and the project stakeholders. It is intended that the monitoring system should take the form of a

slow but extensive dialogue up and down the project hierarchy each month.

Annually, all the stories that have been selected over the year are circulated amongst the project stakeholders. The stories are accompanied by the criteria that the review fora used in selection. Finally, at a round table meeting, ‘investors’ are asked to review the selected stories. They select the stories that they consider to be the most significant accounts of change.

### ***Stage Three: Secondary analysis of the stories***

In addition to the production of a document containing selected stories and readers’ interpretations, the story process itself is monitored and additional analysis is carried out.



*Figure 1. Main steps of the Story Approach as implemented in the Target 10 dairy extension project*

## **The Value of Sharing Stories in Making Sense of Project Impact**

The Story Approach was found to be a particularly valuable tool for participatory evaluation as it created a space for practitioners to reflect, and to make sense of the complex changes that were occurring as a result of the project intervention. Secondly, it

provided a dialogue to help the various collaborators and stakeholders make sense of each other's values that emerged while interpreting the stories.

### ***1. Sharing stories helps project stakeholders make sense of impact***

In the Target 10 case-study, the process of collecting and analysing stories saw farmers, collaborators and extension staff sitting together at committee meetings discussing and interpreting qualitative data, casting evaluative judgements and negotiating about what constitutes a significant change. As the process went along, it was noticeable that the stories were improving and that the storytellers were getting more skilled at capturing impact and presenting the stories. They were also learning what sorts of themes were valued by other project stakeholders. After six months, the stories seemed to be more 'finished' and more clearly about change in the specified domains. The implication from this is that, not only was the project learning to run the process, but also the storytellers were responding to the feedback from the committees. The feedback itself also showed signs that the review fora were also becoming more focused in terms of what they valued in a story. It appeared that both the storytellers and the committee members (farmers, educators, industry representatives, and extension staff) became better at conceptualising impact. In other words they were learning to collectively make sense of the impact of the project interventions.

### ***2. Sharing stories help project collaborators make sense of each other's interpretations***

As with many other publicly funded programs, agricultural extension in Victoria has recently moved into a purchaser-provider arrangement and the numerous existing projects were amalgamated into a smaller number of 'mega-projects'. Each of these mega-projects are delivered and managed with considerable client, industry, and university collaboration. One of the key problems in the new environment for delivery of extension is the need to build an organisational capacity for evaluation and dialogue between the various (and numerous) collaborators (McDonald and Kefford, 1998). The story approach appears to have allowed a space for dialogue between stakeholders about what is desirable and undesirable in terms of impact - especially in relation to unexpected impact.

In addition to encouraging dialogue between the various collaborators, a need had also been expressed to create dialogue and negotiation about evaluation requirements between deliverers (providers) and the investors (purchasers). Following the move to the purchaser-provider model, it had become mandatory for new projects to prepare comprehensive evaluation plans and follow them through, but there was no real clarity about what was expected to be included in these plans. The Story Approach can help investors and deliverers enter dialogue with regard to evaluation. In the Target 10 Project it helped build dialogue and a shared understanding of what was being achieved and what was desirable impact by:

- Exposing project investors to what was happening in the field, especially in relation to the broad range of unexpected impact.
- Alerting project delivery staff to the fact that investors bring their own personal and organisational values with them when making evaluative judgements. This acknowledgment of differences helped provide an understanding of the array of expectations that investors had of the project. This set the stage for negotiations about what was realistic in terms of evaluation information.

- Allowing the opportunity for the delivery staff to receive feedback on how the investors interpreted the stories, which provided guidance for project re-development and refinement of the Story Approach itself

## Turning the Mirror on Ourselves

In this paper I have discussed the value of sharing and collectively interpreting stories of program impact through the Story Approach to help program stakeholders make sense of program impact. In this symposium Patricia Rogers and I will use parts of this approach to help evaluators share and interpret stories of their own evaluation practice.

While explaining the Story Approach to students, I tend to demonstrate the process of collectively interpreting stories by asking the students to bring their own stories; for example stories about the most significant change in relation to their experiences with knowledge gain since being involved in higher education. I then ask them to review the stories and to try to select one story that they consider to be the most significant account of change. I do not give them any criteria to make this selection, but ask them to make explicit any criteria that they use to judge the stories. This session is very powerful, and seems to allow interpretation of the stories based on the collective group values, and explication of these values. I should add that, frequently, consensus cannot be reached, but the process of *trying to achieve* consensus about which was the most significant story, brings to the surface the groups' values and experiences with regard to learning.

In much the same way, I am hoping that the process of selecting the most significant story of evaluation practice can also help us to make sense of what we value in our own evaluation practice. Sharing stories of practice can be a very evocative tool, which can be added to and amplified by using this process to help the group to engage with the stories more profoundly through the 'game' of comparison and voting for one story against another.

Clearly there are many ways in which the Story Approach cannot be used in its entirety outside of a program structure. In evaluation practice there are no boundaries of program activity, no formal hierarchical structure, and perhaps even less of a unified vision as to what we are attempting to achieve in our practice than would be found within most program teams. However, we hope that some of the principles from the Story Approach can be usefully harnessed in a workshop situation to help practitioners make sense of their practice in a structured, facilitated and evocative manner.

This symposium aims to use elements of the Story Approach to help evaluators to make sense of evaluation practice. At the same time participants will experience an important aspect of the methodology of the Story Approach which was originally developed to help practitioners make sense of their program's impact.

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