

Transforming research organisations via monitoring, evaluation and learning: how can we evaluate our own work?



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Building a culture of impact thinking and practice within our organisations

The screenshot shows the homepage of the BEYOND RESULTS website. At the top, there's a blue header with the logo 'BEYOND RESULTS from agresearch' and a 'Contact us' button. Below the header is a decorative background featuring green and yellow diagonal stripes and seven circular icons representing different tools: people, puzzle pieces, a magnifying glass, a person, a network, a circular arrow, and a graph. A sidebar on the left contains links for 'About', 'Success Principles', 'Case Studies', 'Tools' (which is highlighted in blue), 'Impact Planning Tool', 'Programme Logic', 'Activity Plan', 'Communication Channels', 'Evaluation Methods', and 'Support'. The main content area has a heading 'Tools' and a paragraph about adapted tools for practical use. It lists several tools with bullet points: Impact Planning Tool, Programme Logic, Activity Plan, Communication Channels, and Evaluation Methods. Below this is another section with a link to useful resources.

Tools

Here are some examples of tools and templates that AgResearch has adapted for practical use in the context of a New Zealand research organisation to plan for and evaluate impact.

- Impact Planning Tool
- Programme Logic
- Activity Plan
- Communication Channels
- Evaluation Methods

Here are links to useful resources that others have developed, provided here with their permission.

- Adopt Tool

The screenshot shows a page from a content management system (CMS) titled 'Impact toolkit: changing the conversation from 'what' to 'why''. The page includes a navigation bar with 'Pages', 'Favourite', 'Watch', and 'Share' buttons. The main content features a large image of a clipboard with various tools like a hammer, wrench, and screwdriver, labeled 'IMPACT TOOLKIT'. A descriptive text states: 'The aim of this Toolkit is to facilitate the institutionalisation of impact within enterprise, portfolio and divisional planning, monitoring and evaluation across CSIRO.' Below this are two rows of cards. The top row contains three cards: 'ABOUT THE TOOLKIT' (with an icon of a person holding a briefcase), 'THE METHODOLOGY' (with an icon of a brain and gears), and 'HOW-TO GUIDES' (with an icon of a person standing next to a large red question mark). The bottom row contains three cards: 'TOOLS & TEMPLATES' (with an icon of a notepad and pen), 'RESOURCE LIBRARY' (with an icon of a book and '@ symbol'), and 'GLOSSARY' (with an icon of an open book).

Impact toolkit: changing the conversation from 'what' to 'why'

Created by Majewski, Shane (IM&T, Black Mountain), last modified by Hays, Renate (SM&I, Black Mountain) on Apr 06, 2016

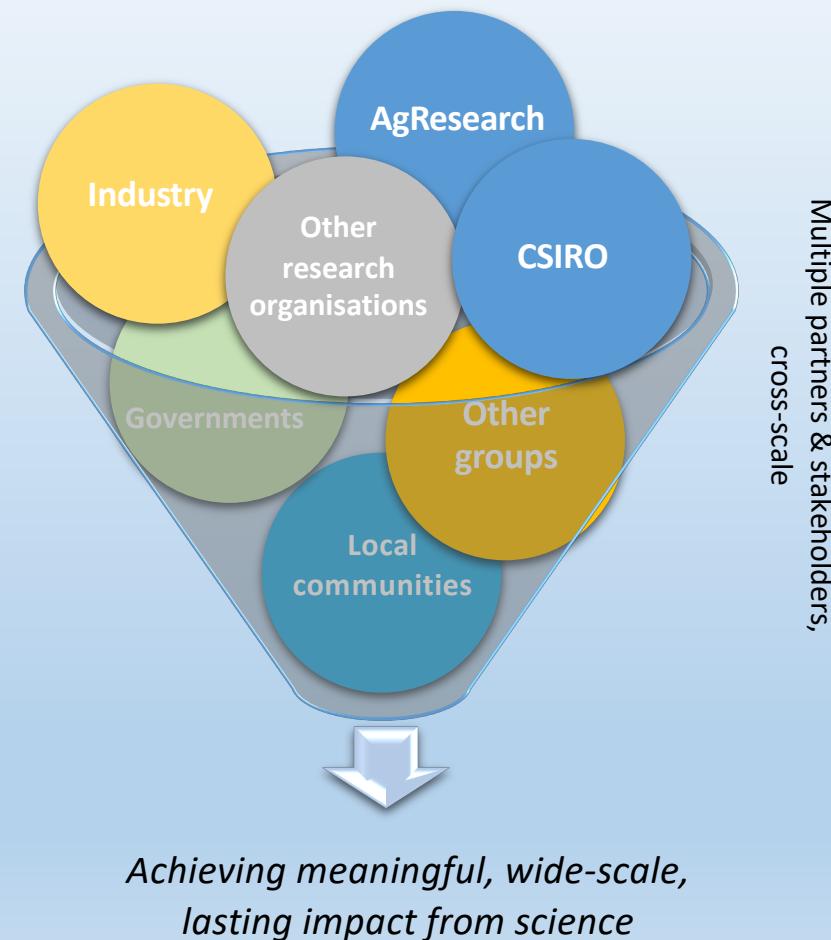
IMPACT TOOLKIT

The aim of this Toolkit is to facilitate the institutionalisation of impact within enterprise, portfolio and divisional planning, monitoring and evaluation across CSIRO.

ABOUT THE TOOLKIT	THE METHODOLOGY	HOW-TO GUIDES
TOOLS & TEMPLATES	RESOURCE LIBRARY	GLOSSARY

Building a culture of impact thinking and practice within our organisations

- Collecting **evidence along the way**
- **Enhancing our understanding** of how and why impacts were achieved (or not)
- Increasing **reflection** (amongst scientists/project-level) and at management levels
- Addressing **organisational barriers/incentives**



Monitoring, evaluation and learning



What are the benefits?

Is it worth the effort?

How do we know?

.. Scientists can be a sceptical bunch!

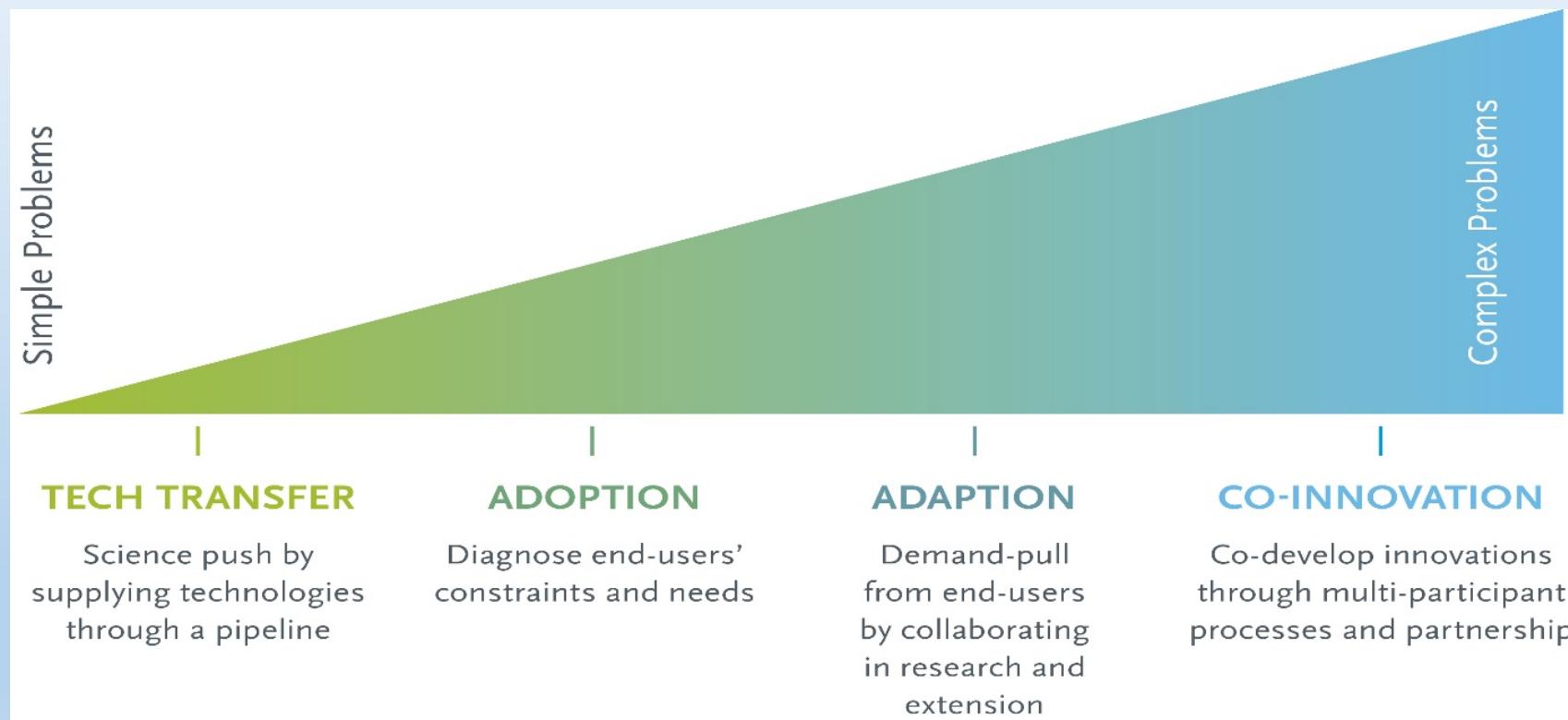
“It is very hard at the moment to see that recording information related to M&E is adding more value - we are under pressure to do research first.” (Senior scientist)

.. But others are on board

“Our stakeholders need to know what we have achieved. We need to be able to show them our relevance and be specific about it.

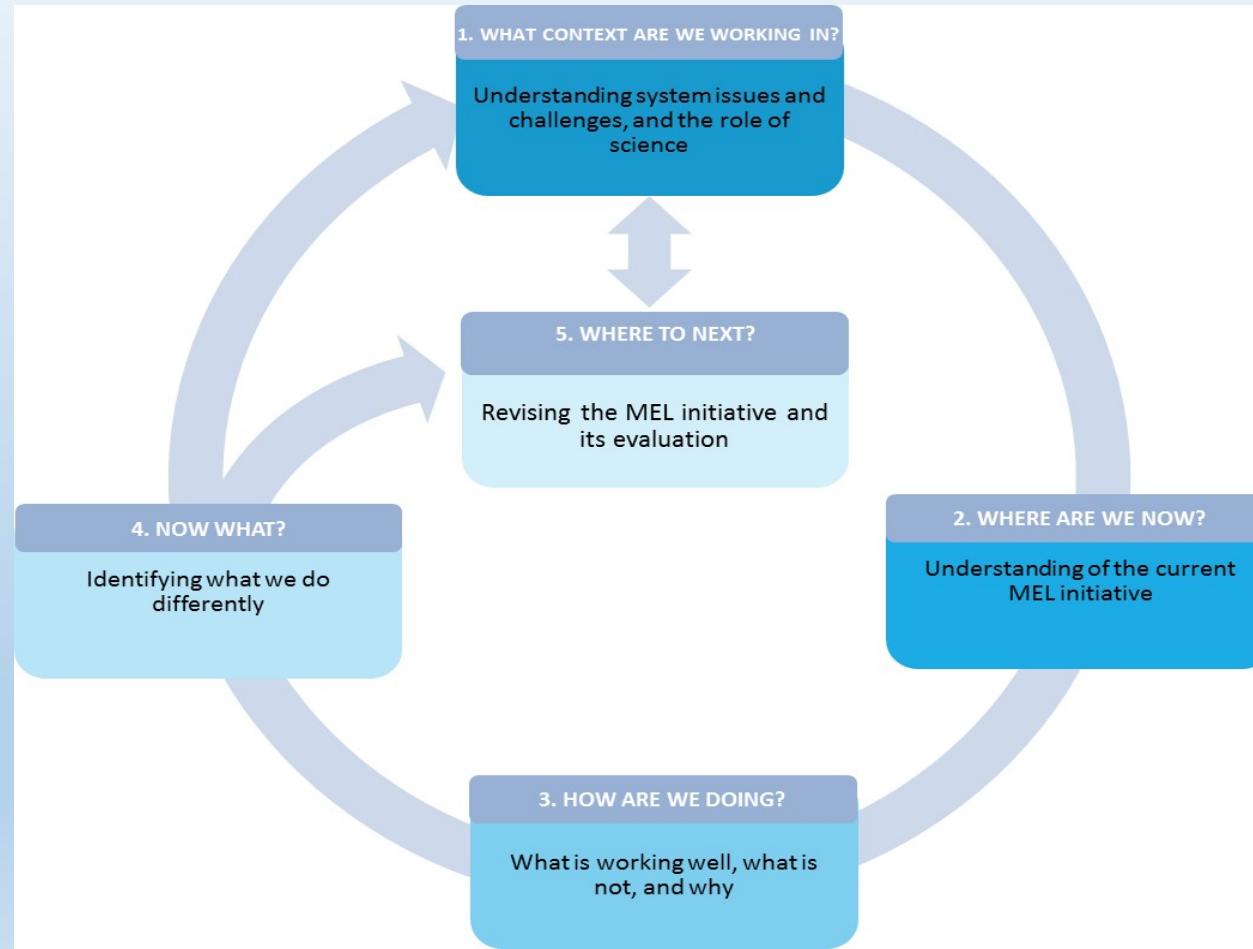
[We have] got to commit to make the change and capture impacts as they happen and this is the method for doing it.” (A different senior scientist)

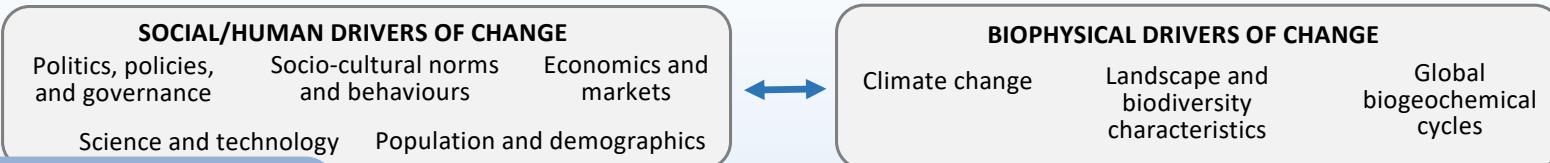
Tackling the spectrum of MEL required



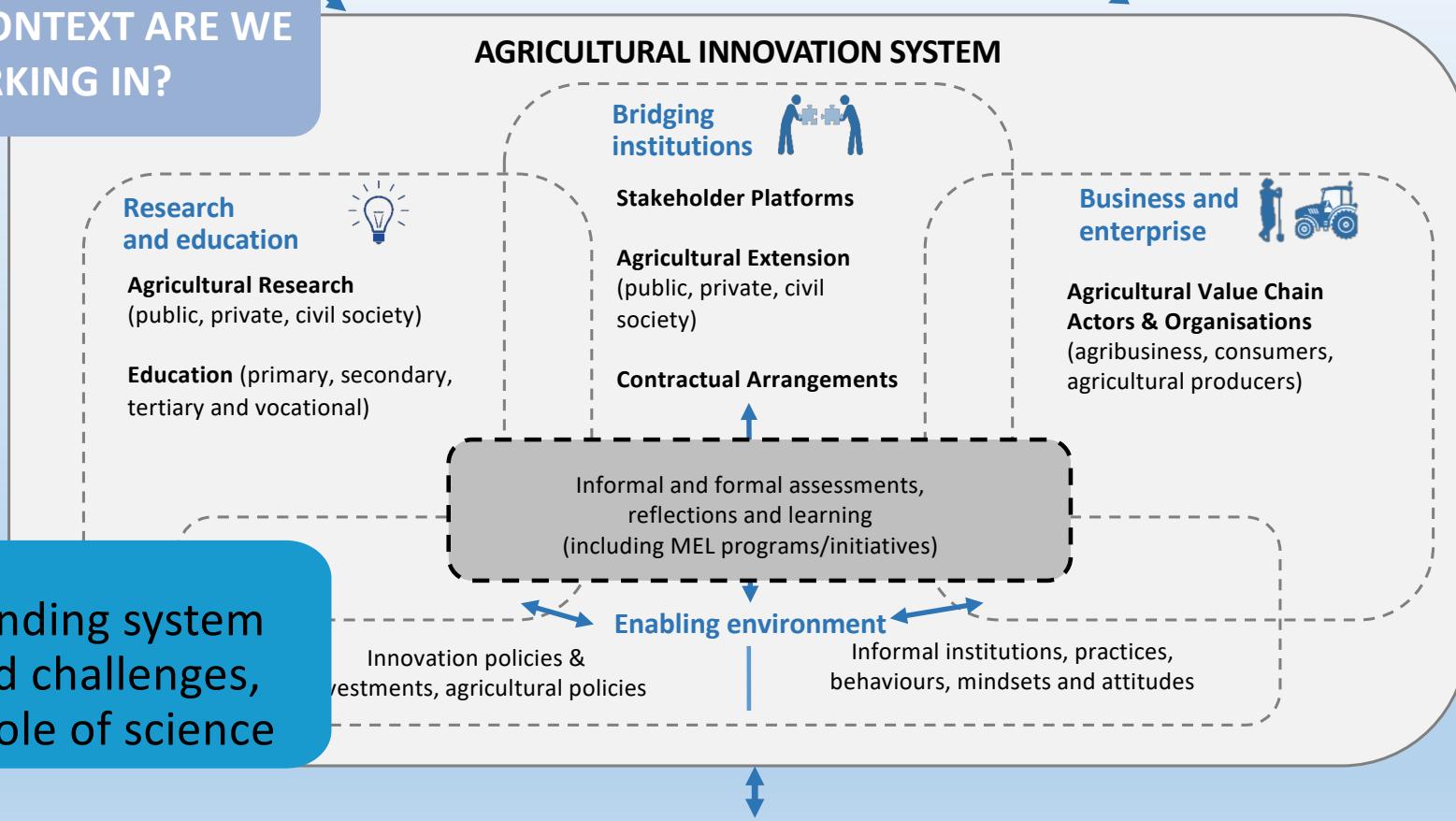
Source: www.beyondresults.co.nz. Adapted from: Klerkx et al., (2012) In: *Farming Systems Research into the 21st Century* 457-483; NZ Ministry for Primary Industries Extension Framework.

We've set ourselves the challenge: MEL of MEL!





1. WHAT CONTEXT ARE WE WORKING IN?



Understanding system issues and challenges, and the role of science

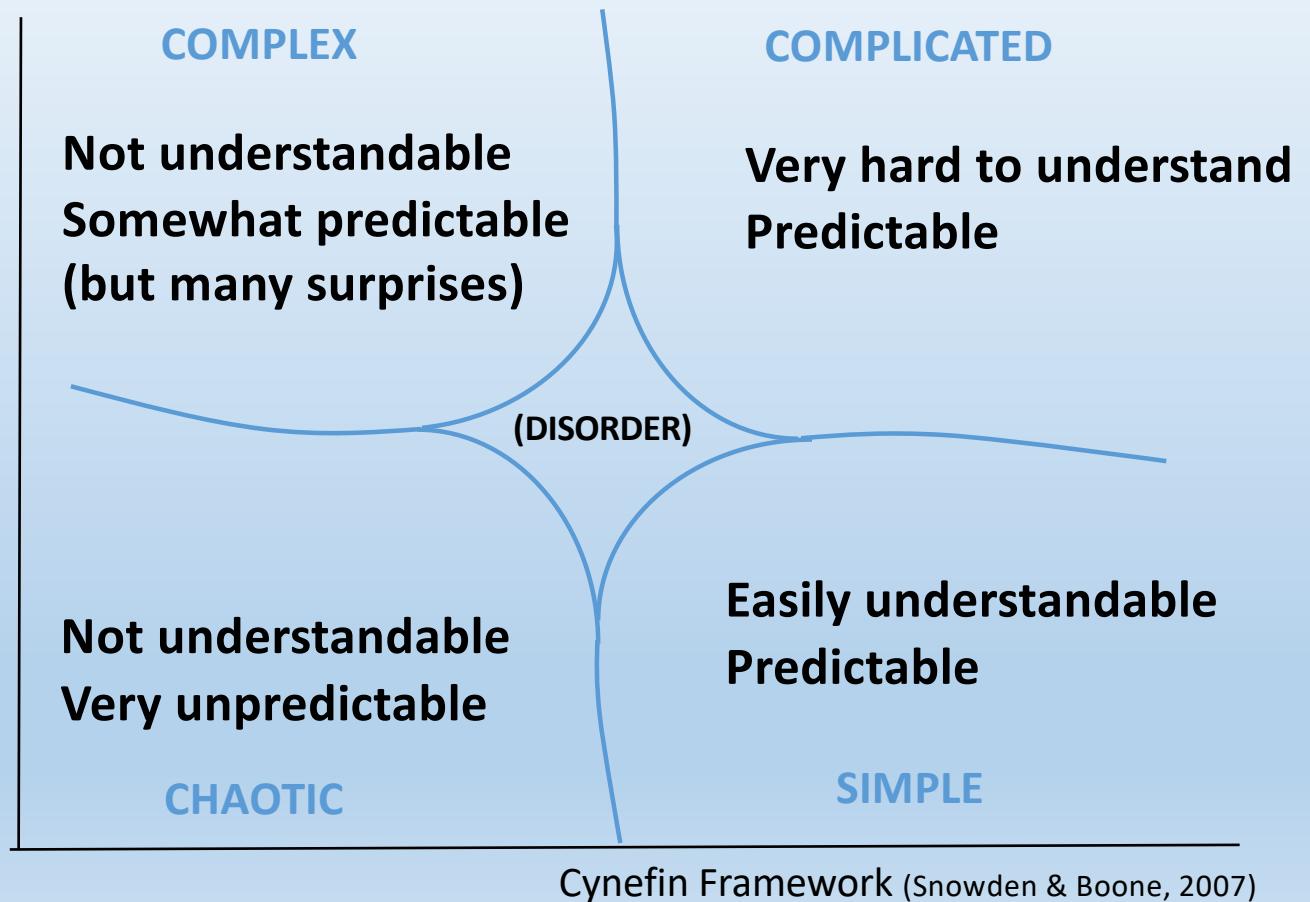
SOURCE: Adapted from
Tropical Agriculture Platform
(2016)

1. WHAT CONTEXT ARE WE WORKING IN?

How challenging are these problems?

What are the changes needed to address different challenges?

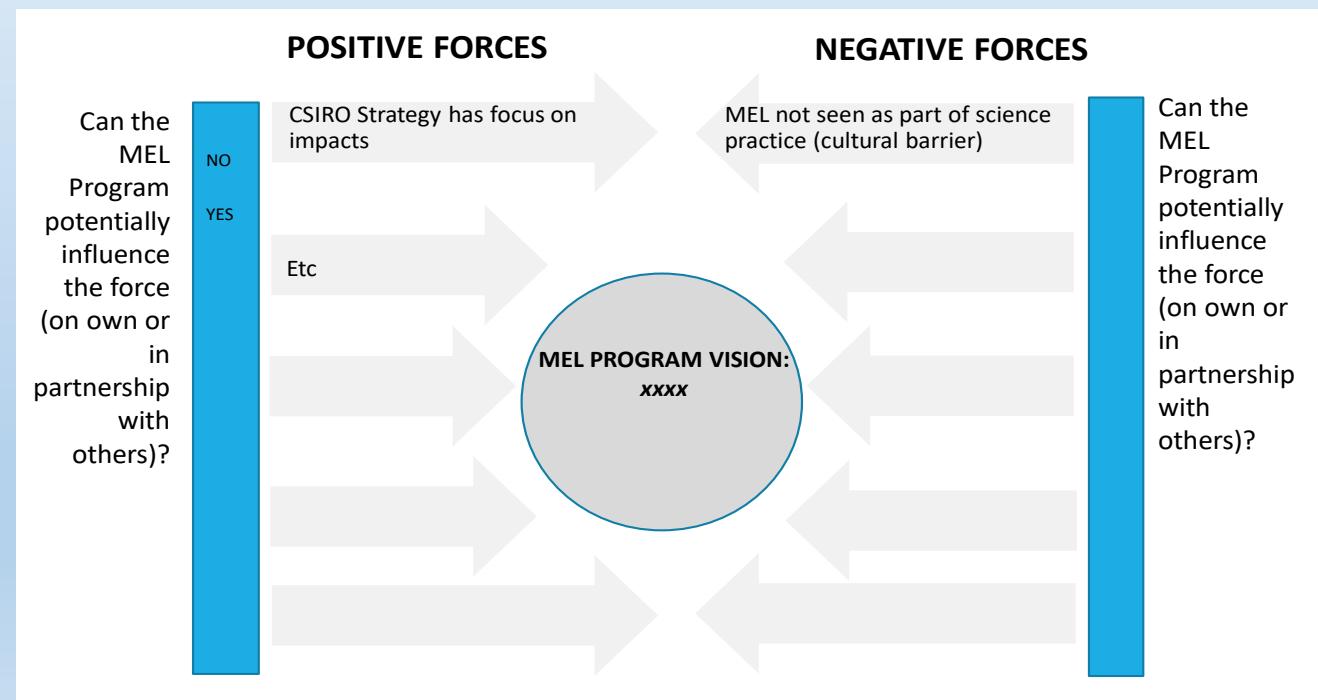
What role does research play?



2. WHERE ARE WE NOW?

Understanding the current MEL initiative

What is being done? (activities/ products)
Why is it being done (rationale; gaps; needs)?
What is going to change?
Positive and negative forces?



3. HOW ARE WE DOING?

What is working well,
what is not and why?

Individual interview questions for participants involved in MEL initiative

“The work I do is impact focused – so hasn’t been a culture shock – it’s reinforced how hard it is to monitor these things; and the resources required to do proper M&E.”

“... it’s making me realise this is a specialised field and a discipline in itself... a conclusion from that is – how reasonable is it to expect scientists who were employed with specialist skills to turn into M&E specialists”

“Learning by doing has been good – having to write an impact story on a page (with evidence) has been a good process – it’s been a tangible cause to stop and think and do...”

4. NOW WHAT?

Identifying what we do differently

Collective reflection on outputs of phases 1-3

Reflection/sense-making questions

Questions can be asked at each of phases 1-3 and themed

In general, we noticed...?

What were we surprised by....?

Are there any gaps/recommendations we need to make?

What should we do differently, at different scales (organisation to project)?

What assumptions do we have about what we were hoping to achieve?

What do we know now that we didn't know when we started? E.g. new science/knowledge/methodologies etc.

Adapted from Guijt and Oakden (2016)

5. WHERE TO NEXT?

Revising the MEL initiative and its evaluation

Drawing on the insights from phases one to three and utilising the reflection from phase 4, this phase is about collaboratively revisiting or developing the MEL initiative's *theory of change*.



Does the framework resonate?

Have you seen other frameworks for assessing whole of MEL initiatives?

How do we manage more transformational bodies of work?



Thank you

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Thank you to our colleagues and respective organisations involved in
this on-going collaboration