



As shown in the figure, evaluation has a different purpose in each phase of the Panarchy Loop. Formative evaluation supports the exploitation stage, and summative evaluation the conservation phase, but developmental evaluation is needed to nurture exploration. In this phase, understanding is ongoing and emergent, and there is a need to interpret both direction and results. If ideas are not allowed to fully “incubate” in the exploration phase, it is difficult for something truly innovative to be born.

Evaluation is about critical thinking; development is about creative thinking. Often these two types of thinking are viewed as mutually exclusive, but developmental evaluation is about holding them in balance. Developmental evaluation combines evidence-based and objective evaluation with the role of organizational development coaching, which is change-oriented and relational.

Developmental evaluation:

- facilitates assessments of where things are and reveals how things are unfolding;
- helps you to discern which directions for action hold promise and which ought to be abandoned;
- suggests which new experiments should be tried.

Developmental evaluation also takes into account changes to an organization – to its structure, governance, relationships – inasmuch as they constitute an important context within which innovation takes place. To clarify some of the ambiguity that accompanies organizational change, the evaluator may introduce strategic and/or questions that can help individual or collective knowledge to be integrated.

Developmental evaluation may also consider the dynamics of collaboration itself. Complex problems tend to require the integration of diverse perspectives from different parts of a system. Various stakeholders may understand the problem differently and enter into an initiative with diverse reference points. Within this diversity, there is still a need to develop and execute strategies. Developmental evaluation helps collaborators to recognize and work through differences in perception that might otherwise fragment the work and hamper ongoing developments.

Ultimately developmental evaluation is about rigorous inquiry for development. It is being intentional about using data in a meaningful way to inform innovation in progress. The product or result of a successful developmental evaluation process is informed changes in what is being evaluated.

Three key features of developmental evaluation are:

#### Framing the Issue:

Social innovators are mobilized by a powerful sense that something needs to change. They may have a new perspective or approach to a historically stubborn issue, or may see the intersection between multiple issues in a new way. As innovators work on these issues, their understanding moves from a vague understanding to increased clarity. New learning may cause a shift in thinking which prompts another cycle of uncertainty and clarification. Developmental evaluation supports innovators in the conceptualization and articulation of the problem by helping to frame the issue and its dynamics.

#### Testing Quick Iterations:

Many people who develop and deliver social programs naturally experiment. New ways of doing something are tried, often based on feedback loops and perspectives about changing needs and demands. This can lead to improvements. Developmental evaluation brings a measure of rigour to the learning generated from these experiments. As new programs roll out, leaders intuitively make observations and refinements. These lessons are usually part of our natural learning processes. Developmental evaluation is intended to make visible the intuitive and the unsaid. Applying developmental evaluation means being more systematic about subjecting relevant data and observations to interpretation and judgment.

#### Tracking the Trajectory of the Innovation:

A standard characteristic of problem solving is that once the problem solver experiences the “eureka moment,” the path to the solution seems obvious. When innovators look at projects retrospectively, the description of how they went from beginning to end appears seamless and direct. Key insights about how something was successfully accomplished are often inaccessible. This doesn’t help the next person trying to solve a similar problem, or the original innovator who might want to apply the learning process to other situations. Developmental evaluation records the roads not taken, unintended consequences, incremental adjustments, tensions, and sudden opportunities. The tracking reveals what it takes to create something new. This serves two purposes: it makes decision-making along this path more transparent and generates valuable data which can be useful for dissemination. Such documentation also supports accountability while allowing for a high degree of flexibility.

