

# **Evaluating Social/Systemic Change Strategies: A Focus on Personal Transformation and Network-Building in Leadership Development**

**Creating Space V  
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Session Synthesis**

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## **Part I**

During the first session of the Evaluation Learning Circle at Creating Space V, we discussed what we are learning about how leadership is supported through both community organizing and leadership programs. Following are some questions and themes that we discussed.

How do we conceptualize the two terms personal transformation and social change? Personal transformation is validated through personal narratives that are told when individuals or groups of individuals articulate personal troubles as public issues. Individuals are validated and supported through both vertical and horizontal networks. Transformation is evident when individuals express a higher degree of human potential, e.g., “I never felt more alive.” Social change is evident when those who have been disenfranchised:

- increase their portion of public resources, including participation in decision-making;
- reduce levels of unpunished overt violence and unrecognized covert violence;
- increase public recognition of the narratives of the community of memory, and
- remove caste-like restrictions associated with the group.

Successful locally initiated social change efforts depend on “free spaces” for constructing an alternative history of events and origins of conditions (e.g., communities of memory), redemptive organizations (e.g., voluntary associations with the purpose of transforming society and modeling the changes sought) and heroic bureaucracies (e.g., external agencies that seek to redistribute resources and express empathy for the narratives of the community of memory and the goals of redemptive organizations.

How do we support a critical mass of leaders that can lead systemic/social change? How do we support/strengthen people’s courage and confidence to lead change? How do we support leaders to be in authentic community with one another?

Lessons learned from evaluations of The California Wellness Foundation’s Violence Prevention Initiative leadership programs, and six Packard and Gates Foundation-funded population leadership programs include:

- the power of recognition;
- calling people to leadership and supporting them to deal with their fears and shift their mental models;

- taking people outside of experiences and environments they are most used to (e.g., with other leaders they do not normally interact with, in locations and communities where they do not regularly find themselves) in order to transform and broaden them as individuals and assist them to recognize what they share with others who are different from them;
- supporting connections that continually deepen and expand networks;
- investing flexible resources that leverage emerging change efforts; and
- using evaluation as a catalyst for deeper learning by foundations, programs, and leaders.

Each convenor posed a question for small groups to consider. These questions were:

- How can we measure progress towards transformative leadership in ways that do not maintain the status quo?
- How do program actions/activities support personal transformation?
- How do we support a critical mass of leaders to lead change?
- Do funders really value personal transformation? How would the investment be different if we did?
- In what ways do notions like “community of memory,” “redemptive organizations,” and “heroic bureaucracies” resonate with our experience?

Based on the small group discussions, participants focused a set of questions for critical reflection about how we invest, design, run and participate in leadership programs

- What difference do we want to make?
- What will success look like? Who says so?
- Who does the program serve? Who is not served?
- What are the opportunities and limitations of fellowship programs as a leadership development strategy?
- Who gets selected to “represent” the community?
- How effective is it for communities when one leader is given the opportunity to participate in a leadership program outside that community?
- How do leadership programs develop a cadre (or critical mass of leaders) beyond just supporting the development of individuals themselves?
- What is the value of locally-based programs compared with national programs? Can we create programs that provide the benefits of both?
- What are we doing to promote collaboration between programs and among program participants from diverse programs?
- How can funders and leadership program staff work together more effectively to support and sustain leadership development efforts?
- What skills/knowledge/courage do leaders need to act? What habits of mind? How are they best supported?
- How are leaders supported to stay true to their values when they are selected and recognized as leaders?

## **Part II**

In the second session, we focused on evaluation approaches and dilemmas:

- Establishing cause and effect in leadership programs
- Using theories of change
- Involving diverse stakeholders in framing the evaluation
- Ethical dilemmas in how evaluation findings are used
- Using evaluation to strengthen programs, not punish or eliminate them
- Building a culture of continuous learning
- Cutting the cost of evaluation
- Integrating evaluation into the fabric of our program
- Using learning plans
- Capturing critical events in the change process

We framed some questions for collective inquiry around the topic of personal transformation and social change. A synthesis of those questions may be found below.

### **Questions for Inquiry about Personal Transformation and Social Change**

#### ***Questions to pose to program participants***

(This can be done through focus groups, written surveys, or interviews.)

- How do you describe personal transformation?
- In what specific ways have you been personally transformed through participation in program activities/experiences?
- What program activities/experiences contributed most to your personal transformation?
- What becomes possible to achieve through personal transformation that was not possible before?
- How does transforming yourself transform the organizations, communities, systems in which you participate?
- What else is needed to transform these organizations, communities, systems?

#### ***Questions to pose to funders***

(Convene key stakeholders within foundations for discussion)

- What is the value of personal transformation for social change?
- Do we value personal transformation? In what ways?
- How do we make the case for investing in personal transformation?
- What evidence do we need to demonstrate the value of our investment in personal transformation?
- What assumptions are built into the evidence that we want?
- What other evidence might demonstrate the value of personal transformation?

#### ***Questions to pose to evaluators***

(Analyze our instruments and evaluation findings)

- What do our instruments prevent us from seeing?
- How do we see what is occurring underneath the ground (where the roots are) or underneath the surface (where the water warms before it boils)?

- How can we measure progress towards transformative leadership in ways that do not maintain the status quo?
- What evidence do we have that individual transformation contributes to organizational, community, and systems transformation?

***Questions to pose to practitioners***

(Practitioners review program design and proposal/reporting strategies)

- How do we design our programs to catalyze and support personal transformation?
- How do we credibly make the case/communicate the value and impact of investing in personal transformation?

***Questions to pose to scholars, others outside the field of leadership***

(Historical accounts and review the literature from other fields)

- What can we learn from other fields about how to capture and document personal transformation, e.g., faith-based communities, psychology, etc.?
- What can we learn from studying social change movements?

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**Ways to deepen our collective evaluation learning at Creating Space**

- Preserve the diversity of people who are in the room
- Continue to take adequate time for discussion (3 or more hours)
- Balance theory and practice
- Balance interaction and “talking heads”
- Balance focus on expensive programs vs. smaller programs
- Start with questions
- Start with best practices of continued learning
- More common stories to anchor our discussion (e.g., case studies)
- Take time to process each presentation
- Present evaluation approaches and corresponding challenges
- Focus on program theories of change across programs and how these theories evolve over time
- Draw on expertise from other fields
- Balance with intentionality small group vs. large group discussions
- Use a neutral facilitator

Synthesis provided by Claire Reinelt, Evaluation Circle Convenor