

COMMUNITY-BASED,
PARTICIPATORY,
AND DEVELOPMENTAL
EVALUATION APPROACHES:
AN INTRODUCTORY TOOLKIT

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Dedicated to all you change-makers connecting communities and creating more vibrant systems in which we can thrive.

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Feel free to circulate excerpts of this toolkit for non-commercial purposes. We'd appreciate acknowledgement where appropriate. ~ Miranda & Gabrielle



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FOREWORD

A community-based approach to evaluation

This document represents philosophies, methods and tools used and adapted by the *Our Food Project* of the Ecology Action Centre. The values that underpin the project are the same ones that inform the evaluation:

- o collaboration
- o grassroots and led by the community
- o inclusive and accessible
- o local and site specific
- o action and person based
- o with long-term vision and a sustainable pace
- o ethical and supportive
- o with a holistic application of our values 1



¹Chapman G, & MacLeod M, (2012). *Our Food: 2011-2012 Year End Review.*Available from: https://www.ecologyaction.ca/files/images-documents/file/Food/Final_report%202012%20web.pdf

Using this toolkit

This toolkit is designed to provide an introduction to evaluation approaches--with examples of many tools--that we have found useful in our work with *Our Food*. It is not designed to be printed out in its entirety. In considering the trees, we suggest that you print only the sections or tools relevant to your context or use it in its entirety in its digital format. All tools throughout and in the appendices are offered as templates to be adapted, re-created and re-worked for your specific contexts.









Why evaluate?

As program designers and innovators, we all want our initiatives to work well and to meet real needs. But it takes time and resources to reflect on what's working and notice what needs to change, be improved, or be discarded. In the moment, when we're stretched too thin, it often feels more effective to spend all of our time implementing activities and programming. In other words, we prioritize doing over reflecting. However, taking the time to understand the impact of our actions and adapting interventions accordingly can increase effectiveness in the long-term, therefore increasing an organization's sustainability and real impact.

Effective organizations use evaluation to document positive outcomes and to inform continuous improvement.

Existing funders want to know if their investments yielded results, and new funders want to invest in programs that work.

Board members, staff, clients and community stakeholders want to associate with programs that are effective.²

While important to tell an accurate story of your organization's work to funders, it is equally important to share an accurate story with yourself, your team, and your target population. We do the work because we care about making something better. By using evaluation to understand the work, we are better able to let go of ineffective practices and use the available time and energy for greater results.

Evaluation is simply learning about what a program (or program component) is doing and understanding what may have changed, if anything at all, after an intervention. In this way, learning can be integrated into any activity, meeting, or workshop on any scale. It can take 5 minutes at the end of a meeting, or 30 minutes at the end of a workshop.

A community-based approach to evaluation

When adapting or developing an evaluation tool, it is important to take into consideration how the process can contribute to the target population. For example, the practice of asset mapping is an evaluation tool, but also a process for community members

²Graig E, (2014). Usable Knowledge.

Available from: http://www.slideshare.net/EricGraig/why-evaluate-3-39731862

to understand their environment more fully. This type of research and evaluation is designed to contribute to community development and empower citizen-driven change; the evaluation process and outcomes benefit the program, the funder, the community, and the partners. This is in contrast to research collected for the sole benefit of the program and a set of 'experts' who collect data.



HOT TIP. USE ACCESSIBLE LANGUAGE

Using the word 'evaluation' can turn some people off and even be intimidating or scary ("Is this a test?!"). Be creative about the words you use to describe an evaluation activity: reflection, feedback, learning, tracking progress, documenting, understanding impacts, etc.



Flow of the toolkit

This toolkit is divided into two main areas: an introduction to evaluation and research approaches and an introduction to practical tools and methods. Section 2 delves into theory, giving a primer on developmental evaluation in comparison to formative and summative evaluation. This section also introduces basic research techniques that support evaluation practices, such as quantitative and qualitative research and ethics. Section 3 demonstrates a series of external and internal evaluation practices laid out with the following categories: evaluation need, the purpose of the tool, when to use it, workshop template, what's next, and resources.



Developmental Evaluation 101

Developmental Evaluation (DE) is an approach designed to support innovation and experimentation within highly complex and dynamic environments, where there are no certain ways forward, where multiple pathways are possible, and where there is a need for innovation, exploration, and social experimentation. DE assists organizations and initiatives to increase the impact of their work by providing real-time data and feedback to help develop and adapt an intervention as it unfolds. DE can be used by organizations and groups that are:

- o Creating a new program, social process, strategy or policy from scratch
- o Adapting a model in constantly evolving contexts
- o Replicating a model that emerged and is proven to work effectively in one context, and adapting it to a new context
- o Developing a rapid response in the face of a sudden major change or crisis
- o Aiming to encourage systemic change

DE serves a different purpose than traditional evaluation (see table below). In contrast to formative or summative evaluation, DE supports the creation or radical adaptation of a model in real-time. This might mean:

- o Documenting actions, short-term results and consequences of those on-going actions, and their connections to the initiative's goals
- o Identifying emerging processes and outcomes and making sense of their implications
- o Determining when and if an initiative is ready for a formative evaluation

Organizations using DE conduct a series of analyses to better understand how the initiative is being implemented, how well it is working, and how it can be adapted in real-time. A developmental evaluation might use a range of different data-gathering techniques, such as audio recordings, interviews, surveys, focus groups, and sometimes even arts-based research methods (i.e. asset mapping, photovoice, graphics and other methods described in detail below).

Developmental evaluation supports initiatives to ask questions such as: Are we walking the talk? Being true to our vision? Dealing with reality? Are we connecting the dots between here-and-now reality and our vision? How do we know? What are we observing that's emerging? What do we do next?

The table below outlines how developmental evaluation and traditional evaluations differ.

Comparison of Developmental Evaluation and Traditional Evaluation Practices³

| Traditional Evaluations | Developmental Evaluations | |
|--|--|--|
| Purpose. Evaluation is designed to improve an existing model (formative evaluation) or test, prove and validate a program model (summative evaluation). | Purpose. Evaluation supports development of innovations and adaptation of interventions in dynamic environments | |
| Roles & relationships. Position the evaluator outside to assure independence and objectivity. | Roles & relationships. Position evaluation as internal, team function integrated into the process of gathering and interpreting data, framing issues, surfacing and testing model developments. | |
| Accountability. Focused on external authorities and funders based on explicit and pre-ordinate criteria. | Accountability. Centered on the innovators' deep sense of fundamental values and commitments. | |
| Design. The evaluation design based on linear cause-effect logic models. Evaluator controls the evaluation and determines the design based on the evaluator's perspective on what is important. | Design. The evaluation is designed to capture system dynamics, interdependencies, and emergent interconnections. Evaluator collaborates in the change effort to design a process that matches philosophically and organizationally. | |
| Measurement. Measures performance and success against predetermined goals. | Measurement. Develop new measures and monitoring mechanisms as goals emerge and evolve. Measures can change during the evaluation as the process unfolds. | |
| Aims. To produce generalizable findings across time and space. | Aims. To produce context-specific insights to inform ongoing innovation. | |
| Complexity vs. control. Accountability to control and locate blame for failures. | Complexity vs. control. Learning to respond to a lack of control and stay in touch with what's unfolding and thereby respond strategically. | |
| Standards. Methodological competence and commitment to rigor, independence, credibility with external authorities and funders; analytical and critical thinking. | Standards. Methodological flexibility, eclecticism, and adaptability; systems thinking; creative and critical thinking balanced; high tolerance for ambiguity; open and agile; teamwork and relational skills; able to facilitate rigorous, evidence-based perspectives. | |
| Evaluation results. Detailed formal report(s) and validated best practices. Render definitive judgments of success or failure. Can engender fear of failure. | Evaluation results. Rapid, real-time and accessible feedback, supports direction or affirm changes in direction. Results nurture learning. | |

³Adapted from Patton, M. Q. (2011). Developmental evaluation: Applying complexity concepts to enhance innovation and use. Guilford Press. (p30, 23-26).



Let's take a moment to reflect on you or your organization's evaluation needs...

- o Do you want to test, prove, and validate an existing and well-established model or approach? If so, an outcome evaluation would be most suited to your initiative or model.
- o Doyouwanttoimprove and fine-tune a model or approach that is already underway? If so, a formative evaluation would be most suited this phase for your initiative or model.
- o Do you want to support the development of innovations and adaptation of interventions in dynamic environments? If so, developmental evaluation would be most suited this phase for your initiative or model.

The following questions are designed to support you and your organization in exploring your evaluation needs. Gaining clarity in the following areas will lead to the development of a responsive and robust evaluation framework and approach. Through articulating the needs and purpose of the evaluation, you can also find the best match in an internal or external evaluator (as there are various methods, approaches, and philosophies). In turn, these questions can provide your evaluator with a strong, informed foundation from which to design an evaluation best suited to your project, program or initiative.

- 1. What are the intended impacts and objectives of the program, model, or initiative?
- 2. What will be the scope of the evaluation? Do you imagine an extensive evaluation or a more focused analysis of one aspect?
- 3. What would you like to track, capture, and measure?
- 4. Who are the audiences for the findings (e.g. internal to the organization, public, funders, other stakeholders)?
- 5. What might be the best way to communicate the findings (e.g. formal report, a short, accessible document, a stand-alone executive summary, video, infographics)?
- 6. If developmental evaluation is the best approach suited for the program or initiative, how many cycles of data collection would be most useful? In other words, how many times would you like to cycle the learnings from the findings (cycles of evaluation) back into the initiative or program?
- 7. What resources do you have to support evaluation activities?



HOT TIP. CLARIFY ROLES

Be explicit about the developmental evaluation roles and responsibilities within the project or initiative. This is important—especially if the roles are held internally because it creates permission for critical thinking and reflective feedback, enhancing how feedback is received.

Skill Building 101: Basic Qualitative and Quantitative Skills for Evaluation

Developmental evaluation does not rely on or advocate any particular evaluation method, design, or tool. Each evaluation tool depends on the nature and stage of the innovation and the priority questions that will support the development of the initiative. Research methods should, therefore, be selected with the purpose of shedding light on key questions. Regardless of the kind of evaluation you are conducting, using both quantitative and qualitative tools are common.

Common ways of collecting data include:

- o Participant and event observation o Literature or document reviews
- o Surveys

o Tracking social media and website data

o Focus groups

o Staff reflection retreats

o Interviews



Qualitative Techniques

Qualitative evaluation techniques deal with information that cannot be put into numbers. These might include responses from people through interviews, focus groups, and observation. General guidelines for qualitative evaluation include:

- o **Avoid leading questions**: Don't let your desire for supportive, positive data stand in the way of constructing questions that will yield the best information. When conducting an interview, survey or focus group, be sure to review your questions to ensure that they don't lead respondents to a particular conclusion. Don't ask someone if "the cold weather" impacted their decision not to participate in your rally. Just ask, "Why didn't you participate in the rally?"
- o Survey questions: Surveys can quickly provide information, and are easily quantifiable. But don't miss limiting your ability to receive "out of the box" feedback. Be sure always to give your survey sample an "other" option or an open-ended question at some point, which gives them room to explain their thoughts. If you are surveying people who are volunteers or project participants, limit the survey length to 5 minutes or less.
- o Focus groups: If you convene a focus group to learn more about your program activities, be mindful that these groups should be designed to represent different views. Work to get diverse views around the table while still keeping the group a manageable size. A good moderator will carefully construct questions and conversation prompts to gather information while not leading the group to predetermined conclusions. The beauty of a focus group emerges when participants bounce ideas and thoughts off one another and travel down unintended paths. A good moderator does more listening than speaking, prompts participants to expand on their opinions and tactfully returns the focus of the conversation if it goes too far off track.
- o Dialogic and arts-based research: Not all feedback has to come through traditional methods. You might consider including methods such as photo voice, video, storytelling, and facilitation methods such as Open Space, World Café, Pro Action Café, etc.
- o Technology can help: Digital technology can also help you receive feedback. From blogs to photos, digital information can help you evaluate your efforts in ways that were previously impossible. Think about ways that online survey tools, webcams, online conferences and the telephone can make your evaluation life easier.

Quantitative Techniques

Quantitative techniques use numbers to help evaluate your initiatives. Here are some tips on how to reach some useful and rigorous conclusions:

- o Make your qualitative responses count: Once you have responses to qualitative questions, think of ways that you can turn this information into a number. Asking questions with limited choices (while still incorporating a section for "other") is a great way to easily be able to state that, for example, "25 percent of those interviewed identify with the project's key message" or "86 percent of the interviewed participants found the e-mail blast to be too frequent."
- o **Coding**: Quantify qualitative responses by creating keywords that represent emergent ideas and count the number of times they re-occur. Read through, or listen to the responses and make note of repetitive points or themes that emerge. Write the keyword beside the response when the common theme appears, then add them up and compile at the end. This will help you synthesize major ideas, for example "60% of respondents noted that lack of transportation was a factor".
- o How much is enough?: People often claim that their results are "statistically significant." This means the researchers have ensured that they have a random sample and a large enough sample to ensure that the survey responses are likely to reflect the views of the population they represent. To figure out how many people you need to survey to get highly accurate data, check out simple online sample size calculators.
- o Random sampling: A random sample is an unbiased, completely random group of people from your overall project population. Samples are randomly generated by numbering participants and selecting random groups of them by using only their arbitrary assigned number rather than specific details. For example, if you have 80 participants, number them 1-80 and use a random selector to give you a sample: Sample 1: 3, 56, 43, 22, 37 | Sample 2: 80, 64, 12, 77, 59... etc. One way to do this is to use a random sample generator website (www.randomizer.org), or programs like Microsoft Excel.

For more information, see the Innovation Network's Evaluation Resource Center for online guides on the topic of surveys, interviews, focus groups, statistics, data analysis and reporting.

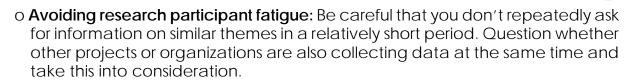
Ethics in Evaluation

The questions below are intended to surface any ethical dimensions that may arise in the **design phase of evaluation**:

- o Are we including all of the perspectives and voices of those the initiative intends to assist?
- o Are there possible negative ramifications that may occur as a result of our evaluation activities?
- o Are we distinguishing between indicators that reflect positive change as a direct result of our work and the work of others? How do we attribute success? To whom do we attribute success (e.g. other partner organizations with similar goals)? How do we want to attribute and/or share success?

During the data collection phase, protecting research participants is a key concern. Below are various aspects to consider:

- o Considering confidentiality: Before beginning data collection, it is important for individuals providing data to understand how their names will be used in connection with the information they provide. The evaluator must explain clearly how the information will be attributed. Will names be attached to quotes? Will pseudonyms be used? Will all identifiers be stripped? Where will the interview or focus group notes/transcripts be stored? Who will have access to the raw data?
- o Considering informed consent and ethics approval: If you are working in highrisk settings, you need to consider undertaking informed consent and ethics approval of your research/evaluation plan. Informed consent is a social science research standard (at the academic level) and is a process of educating research participants about the purpose, procedures, risks, benefits, and alternatives to participation. This can be obtained through a signed informed consent form or can be given verbally and recorded.
- o Considering safety: Evaluators have an ethical responsibility to consider the safety of the individuals who provide them with information and should plan their data collection efforts to minimize any possible risk (e.g. where the meeting takes place or the use of photographs).
- o Setting realistic expectations: Anyone collecting data should be careful not to set unrealistic expectations during the data collection process. To express thanks, generate excitement, or convince people to answer questions, evaluators can fall into the trap of promising that the data will yield a positive result (e.g. the changing of policy, the changing of the individual's difficult circumstances.).
- o Integrity: Those collecting data should be aware their actions are often seen as an extension of the organization or project being evaluated, so trust and integrity are paramount.



The potentials of political interference...

Evaluators should be aware of potential political interference from the implementing organization, the donor, the evaluation team, or the stakeholders. There are many ways, and many reasons why political pressure might be applied to an evaluation process.

- o Implementing organizations may see the evaluation as a way to promote themselves to donors and therefore only steer the evaluation team towards people who will say positive things about the program.
- o Donors may view an evaluation as a way to justify the decision to end funding to an organization by requiring a methodology that misses many of the positive results.
- o The evaluation team or consultants may want to secure ongoing contracts with the implementing organization by presenting the agency in an unearned positive light.
- o Stakeholders may see the evaluation as a way to secure additional resources for their community, and, therefore, may lobby the evaluator to make specific recommendations.

These are just some of the potential small "p" political dynamics that can be at play within the context of evaluation. Honor your integrity. If you feel you are being asked to do something that does not "intuitively" feel right, raise the issue before moving forward. Some call this the "can I sleep at night?" evaluation measure.

Likewise, if you are embedded within the project or initiative, it is important to be reflective of your biases and assumptions. Are there funders you want to impress? Members of your team you want to support? Job security for a period of time? Make a list of these potential internal contradictions and refer to them often as a way of continually strengthening your integrity as an evaluator.

References

Church, C., & Rogers, M. M. (2006). Designing for results: Integrating monitoring and evaluation in conflict transformation programs. Search for Common Ground.

Patton, M. Q. (2011). Developmental evaluation: Applying complexity concepts to enhance innovation and use. Guilford Press.

Silverman, D. (2013). Doing qualitative research: A practical handbook. SAGE Publications Limited.

Westley, F., Zimmerman, B., & Patton, M. (2009). Getting to maybe: How the world is changed. Vintage Canada.



This guide is organized into two spheres of evaluation: external and internal. The external methods focus on gathering impacts of programs and interventions in communities and at all levels of the system(s) involved. In turn, the internal methods look at organizational practices and team observations about the impacts the programs are making.

Materials covered here include:

External Evaluation

Method #1 Asset Mapping

Method #2 Surveys

- o Surveys I. One-time workshop surveys
- o Surveys II. Pre and post workshop surveys
- o Surveys III. Surveys measuring change
- o Surveys IV. Annual program survey

Method #3 Storytelling Circle

Method #4 Photovoice

Method #5 Progress Markers

Internal Evaluation

Method #6 Strategy Journals

Method #7 Performance Journals

Method #8 Team Retreats



HOT TIP. KEEP IT SIMPLE

Prioritizing and streamlining: we can't do it all, so make a good list and then prioritize - the biggest challenge for an evaluator can be having too much info that you can't use well. We don't need to evaluate everything, look for the key places that give big return.

External Evaluation

What are the impacts in the community and the broader system?

Method #1 Asset Mapping

Asset mapping involves using a large map or set of maps that participants can draw on or use stickers to show various assets. It is a creative and very flexible method that can be adapted to many purposes and settings.

Evaluation Need

- o Developmental Evaluation: In order to better understand a community context within which to create a new program, or to adapt or replicate an existing one.
- o Summative Evaluation: To create a comparative look over a specific timescale for longer-term evaluation. For example an asset map is created at the start of a community intervention and then again at the end. A comparative analysis can show what has changed in the community and what change can be attributed to the project or program.
- o Summative Evaluation (alternative): To create a one-time inventory of community assets at the end of a project in order to demonstrate what new assets are attributable to the project or intervention.

Purpose of the Tool

- o To hear community experiences and to engage diverse community members, including low-literacy and/or low English language skills.
- o To develop an understanding of the system⁴ within the community as a first step towards actively shaping the system and fostering self-advocacy.

When to use it

Asset mapping is a fun and inclusive activity. It works best when you have been working with a community for long enough to have a set of engaged community members. This process helps to deepen existing engagement. It is also a great way to engage new community members (particularly effective if you offer food and/or childcare).

⁴The system refers to the interconnecting factors that create the current environment. For example the food system, systems of inequality, economic system, political system, health system etc.

Workshop Template for a 2 hour session

| Time | Activity | Materials | |
|----------------------|-----------------------------|---|--|
| 15 min | Introduction & Ice-breaker | Agenda up on the wall Name tags Markers | |
| 45 min Asset Mapping | | Big maps posted on the wall Dots and labels Markers Painter's tape | |
| 30 min | Strengths and Barriers/Gaps | Pre-made posters Painter's tape Dot stickers Markers | |
| 15 min | Visioning | Flip chart paper Markers | |
| 15 min | Reflection & Closing | Flip chart paper Markers | |

Introduction and Ice-breaker (15 min)

Introduce the project and purpose for the activity as well as the agenda. Have the group go around the circle stating their name and answering an initial question based on the theme of your mapping to get the juices flowing. An example for food asset mapping is: What is your favorite meal to cook?

Asset Mapping (45 min)

Describe the activity to the participants by giving a range of examples. Have sticker labels and dots as well as markers for use. Participants label and mark all assets in their community. These are some examples from food asset mapping:

- o Retail grocery, corner store, etc.
- o Direct marketing CSA (community supported agriculture drop-off point), good food market, etc.
- o Community food infrastructure community garden, greenhouse, root cellar, seed swap/library, tool library, etc.
- o Food services food bank, community kitchen, workshop/support, etc.

After the map has been reasonably populated and participants are slowing down the facilitator can open up a discussion based on the mapping. This can go in a circle to give everyone a chance to talk: "Tell us about what assets you placed on the map." Ask probing questions along the way to dig a bit deeper and continue adding to the maps as more is uncovered.



Strengths & Barriers/Gaps (30 min)

After mapping the physical assets, the conversation can be deepened by talking about specific strengths and barriers or gaps in the community. This conversation can be tailored to various asset mapping topics. If a range of strengths and barriers are already known then two populated posters can be put on the wall: one for strengths and another for barriers or gaps (see poster examples below). If the strengths and barriers are unknown, then have the participants brainstorm them and populate the posters.

Participants mark on the posters with dot stickers or markers to show which factors affect them most or show up more in the community. Facilitators may then lead a circle discussion asking participants to share their experiences and record key points from the discussion on the posters. During this time additional strengths or barriers can also be added.

This is an **example** from a food asset mapping activity. Themes for strengths and barriers are already well know for food access, so they were listed on the posters prior to the workshop and participants contextualized them based on lived experiences: money, transportation (walking with bags, car, bus, taxi etc.), time, social support, knowledge and skills, and infrastructure (access to garden, kitchen etc.).



Supports poster: before discussion



Barriers poster: after discussion with added notes

Opportunities: Visioning (15 min)

Now that there is a good grasp of the assets, strengths and barriers within the community it is good moment to open up for visioning. Facilitators ask the participants to "Dream Big", brainstorming ideas of what they would like to see in their community and in their homes. Ideas are put up on a flip chart for all to see.

Reflection & Closing Circle (15 min)

As a way to wrap up the day, ask each participant to share a closing thought using a question like: How was this process for you? What are you taking home with you from this experience? This is an evaluation moment to learn what worked, what didn't and gain some insights. The responses can help to shape how you conduct workshops of this kind in the future.





What's Next?

Visual Harvest: With the information generated from this workshop a visual harvest can be created. This reflects back to the community what was shared and can offer further opportunities of conversation and engagement. See example below.

Deepening Engagement: Now that the community has a fuller understanding of their context, there may be opportunities to do work around advocacy or action areas.

2013 Halifax Food Snapshot Immigrant Services Association of Nova Scotia (ISANS)



ISANS Community Gar



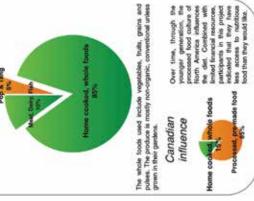
| HOUSE | | | |
|--------------------------|------------------------|---------------------------------------|--|
| Lawtons Drugs | 7071 Bayers Rd | | |
| Scheys | 120 Queen St | produce, grains, bread | |
| Scheys | 287 Lacewood Dr | | |
| Sobeys | 6990 Mumford Rd | | |
| Superstone | 3601 Joseph Howe Dr | produce, daily | |
| | 10 Chain Lake Dr | | |
| | 118 Wyse Road, Dartmox | 490 | |
| | 6990 Mumford Rd | parsiey, cilanto | |
| | 3440 Joseph Howe Dr | spices, Teff | |
| | 230 Chain Lalos Dr | | |
| 3 | 7111 Chebucto Rd | grains, rice, fentile | |
| ā | 1515 Dreaden Row | | |
| Peters Froodque | 1595 Bedford Hwy | | |
| | 3531 Dutch Village Rd | produce, bananes, sucer, fee, self | |
| Bluencee Mini M. | arket 28 Titus Ave | | |
| House Of Halal Geoceries | poperies 14 Thus Ave | Antal meats | |
| | | | |

"Oh my god, I may die here.
I this money I cannot buy fish a
I cannot live without fish."

FOODPROJECT

"Food is connected to identity

ISANS Particip



"The first thing is LOVE. If you put love into what you cook, it will be good" First Voice Responses from Workshops 2013 Halifax Food Snapshot: ISANS

s and shop around for cheaper foods.

on: love to walk for exercise to stores. Use taxi to get bulk food home, and after school, weekends, when have a day off we can go to further

BARRIERS to healthy food ac

OPPORTUNITIES for Positive Food Environments

ture: Would like MORE LAND! More access to growing spaces. A farm Season extension: cold frames, greenhouse to grow in the winter kills: Wild adbles, preserving, how to grow grains here, and food and noortation: go to the valley to harvest fresh fruit and vegetables.

"If I had my own garden, I wouldn't have any problem at all"



How IMPORTANT to the

"Newcomers don't have reference points for all of the more processed foods of North America, such as sugar content, and food label language".



Asset Mapping Resources:

Asset-Based Community Development Institute. (2009). The Asset-Based Community Development Toolkit. Available from: http://www.abcdinstitute.org/toolkit/

Food Matters Manitoba. (2013). A Food Mapping Tool-kit: How to organize a workshop in your community. Available from: http://www.foodmattersmanitoba. ca/wp-content/uploads/2014/04/Food-Mapping-tool-kit.pdf

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Method #2 Surveys

Surveys are used for many purposes. They can be given at the end of a workshop to gather participant feedback, before and after a workshop series to measure change, on a specific topic with program participants, or to gather a comprehensive annual data set measuring program impacts.



HOT TIP. FIGURE OUT WHAT THE DATA WILL LOOK LIKE

When developing a survey spend some time clarifying what it is you really need to know and ask questions that are appropriate to get there. Try filling out this simple you the data you need.

| 1. What I need to know | 2. What I want the data to look like | 3. Survey questions |
|------------------------|--------------------------------------|---|
| active transportation | reported that they use | Since taking our workshop, do you bike, walk, or skateboard to work? a. the same amount b. more often c. less often |



Surveys I. One-time workshop surveys, or feedback forms.

Evaluation Need

- o Developmental Evaluation: to gain feedback from participants in order to adapt programming on an ongoing basis to better meet the need.
- o Summative Evaluation: to gather evidence of overall impacts of the program.

Purpose of the Tool

- o To create a moment of reflection for participants.
- o To hear feedback directly from participants or community members in their own words.

When to use it

For one-off workshops or activities with a group of people. Plan for 15 minutes at the end of each workshop. If it is an afterthought and the facilitator does not make time for it, less people will fill it out. Another option, if relevant to the population, is to send out an online survey, but again, far less people will fill it out.

Sample Survey Questions

Developmental evaluation focus: What is one word that describes your experience? What worked well? What didn't work well? What would you change?

Summative evaluation focus: What did you learn today, if anything? How likely are you to use this skill again? Very likely, somewhat likely, not likely



Example

This is an example that combines both evaluation needs in one short feedback form. (Example also found in Appendix I).

| Workshop Feedback Form | | | | |
|--|--|--|--|--|
| One word to describe today's workshop is | | | | |
| 2. What did you like about the workshop? | | | | |
| 3. What did you not like as much? | | | | |
| 4. What was the most important thing you learned today? | | | | |
| 5. How likely are you to do this again after the workshop? (circle one) And why? | | | | |
| Very likely Somewhat likely Not likely | | | | |
| 6. Any other comments? | | | | |
| | | | | |

What's Next?

Prepare a spreadsheet to input all feedback forms so that you can keep organized and have all data in one spot come reporting time. If you have an online version of your survey you can input all the paper copies and auto-create colourful summary reports.

<u>Surveys II.</u> Pre and post workshop surveys, to quantify change through workshop participation.

Evaluation Need

- o Developmental Evaluation: to gain feedback from participants in order to adapt programming on an ongoing basis to better meet needs.
- o Summative Evaluation: to gather evidence of overall impacts of the program

Purpose of the Tool

- o To create a moment of reflection for participants.
- o To measure self-reported change in skill level due to workshops.
- o To hear feedback directly from participants or community members in their own words.

When to use it

For a workshop series with the same group of people. Plan for 15 minutes at the beginning and end of each workshop or workshop series. Another option, if relevant, is to send out an online survey, however far less people will fill it out.



Sample Survey Questions

Scales provide comparative data from before and after a skill-building activity. Two options include:

| Graphic Ratin | ng Scale | | | |
|--|---------------------------------------|---|---|----------------|
| The state of the s | · · · · · · · · · · · · · · · · · · · | ing a garden? (ciro nd 5 being very skil | | n a scale from |
| Very unskilled | | | | Very skilled |
| 1 | 2 | 3 | 4 | 5 |

| Likert Scale | | | | |
|--------------------------------|-----------------------------------|------------------------------|---------------------------------------|----------------------------|
| What is your skill | level with plan | ting a garden? | | |
| I don't know how to do this | I know a little bit about this | I can somewhat do this | I can do this with some support | I can do this on my own |
| | | | | |

Both types of scales typically have an odd number of points along the spectrum, 5 or 7. Some research suggests that any more and people start choosing randomly, while any less and people may not feel there is an appropriate choice for them.

Example

See Appendix II for an example for a food preserving workshop series.

What's Next?

Prepare a spreadsheet to input all feedback forms so that you can keep organized and have all data in one spot come reporting time. If you have an online version of your survey you can input all the paper copies and auto-create colourful summary reports.

Surveys III. Surveys measuring change, can be created at any time to gather data on a specific area with program participants.

Evaluation Need

- o Developmental Evaluation: to understand if your intervention is making an impact or not in order to confirm or adapt the course of programming.
- o Summative Evaluation: to gather evidence of specific impacts of the program.

Purpose of the Tool

o To measure self-reported change looking back over a specified time period in comparison to the present day.

When to use it

If you find there is a data gap to be filled for reporting, a targeted survey can be a good tool. It can also be useful if you want to test whether you are creating change in a specific area.



HOT TIP. CREATE AN ENJOYABLE **ENVIRONMENT**

BBQ is a great way to get some folks out to complete a survey. Win win!



Sample Survey Questions

Think back to last summer before you had a plot in the community garden. Approximately how many servings of vegetables did you eat per day?

Today, because of your plot in the community garden, how many servings of vegetables do you eat per day?

Example

See Appendix III for an example survey: changes in vegetable consumption over time.

What's Next?

Prepare a spreadsheet to input all feedback forms so that you can keep organized and have all data in one spot come reporting time. If you have an online version of your survey you can input all the paper copies and auto-create colourful summary reports.



HOT TIP. LET THE TOOL DO THE WORK

Many online survey tools such as Google Forms, input you you're not doing an online survey, you can create one to store and summarize your data.

<u>Surveys IV</u>. **Annual program surveys**, are a comprehensive data collection tool that are used once a year.

Evaluation Need

- o Developmental Evaluation: to gain feedback from participants in order to adapt programming on an ongoing basis to better meet the need.
- o Summative Evaluation: to gather evidence of overall impacts of the program.

Purpose of the Tool

- o To measure self-reported change over the past year to the present day.
- o To have a consistent set of data annually.

When to use it

This is a good option if you need to collect a wide set of data and don't have much time and/or resources. Once the survey is completed it can be handled by a group of trained volunteers at different sites. Alternatively, if appropriate to the program participants, an online survey with a nicely crafted invitation can work well.

Sample Survey Questions

See Appendix IV for an example



HOT TIP. TEST IT OUT

Test your survey and adapt it. Testing a survey or interview will illuminate places where you aren't getting to the information you need early. This practice will get you better results and give a better experience for the participants!

What's Next?

Prepare a spreadsheet to input all feedback forms so that you can keep organized and have all data in one spot come reporting time. If you have an online version of your survey you can input all the paper copies and auto-create colourful summary reports.





between stories and our experiences that makes them so powerful? 5

Method #3: Storytelling Circle

Storytelling is a process that can allow people to speak to an evaluation question or theme through sharing personal experiences of their choice. Stories can be very powerful tools. Through stories, knowledge can be shared and strengthened, helping others to understand complex issues that exist in a person's life and community.

Evaluation Need

- o Developmental Evaluation: to share and reflect on work being done, and the context in which it is happening in order to develop a deeper understanding.
- o Summative Evaluation: to gather stories or vignettes of the work in order to make reporting more powerful by giving a fuller and more concrete picture.

Purpose of the Tool

- o To connect a community of people through listening and sharing, through seeing the common challenges and strengths, through mutual support and respect.
- o To reflect, slow down and integrate experiences.

When to use it

When people have stories and experiences built up around a common theme. To connect a group of people with common experiences. The fall and winter are great times of year for storytelling, because these are times of going inwards. Sitting around a fire could be magical any time of year.

⁵The Power of Story - The Story Paradigm. Available from: http://www.co-intelligence.org/PowerOfStoryLong.html

Workshop Template for a 2 hour session

| Time | Activity | Materials | |
|--|---|---|--|
| 20 min Introduction & Ice-breaker Describe the Process | | Agenda up on the wall (including an outline of the process) Name tags Markers Set of sheets with Listening Lenses (see Appendix V) Pens | |
| 45 min | Storytelling - 5 to 10 min per story - 5 min reflection and/or clarifying questions | Timer with gentle sound (cell phone) | |
| 25 min | Small Group Discussions | Listening Lens Harvest sheet | |
| 15 min | Share back themes from discussions | Flip chart paper Markers | |
| 15 min | Reflection & Closing | Flip chart paper Markers | |

Preparation

Prior to the storytelling workshop ask three (or so) individuals if they would share their stories. Prepare them by explaining the process, and answering any questions. You may know of three participants who have particularly relevant stories based on the theme of your storytelling circle. Alternatively, you can ask for volunteers when inviting and welcome whatever shows up.

Introduction and Ice-breaker (20 min)

Go around the circle for introductions and answer an initial question such as: What brings you to this storytelling circle?

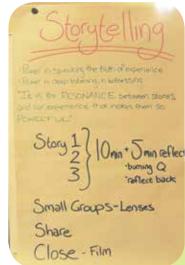
Introduce the activity and the process: While the storyteller is speaking all others are practicing listening deeply, there are no interruptions to ask questions or make comments. There is time for clarifying or burning questions when the story is complete.



Explain the 'listening lenses'. There are 4 listening lenses and each person picks one and takes notes during the story sessions. The purpose is to encourage us to deeply listen to the stories. (See Appendix V for harvest sheets).

- 1. Pivotal Moments: What are the pivotal moments or breakthrough moments in this story? What can we learn from them?
- 2. Magic & Synchronicity: What were the moments of synchronicity and magic in the story?
- 3. Principles: What principles of working can be gleaned from this story?
- 4. Head & Heart: Which moments and decisions were led by the heart and which by the head? How did this impact the outcomes of the stories?

Storytelling (45 min)



Each person has 5 or 10 minutes to tell their story (they had this information beforehand). A gentle musical alarm plays from a phone to signal 1 minute to wrap it up (or another device to keep things moving along smoothly). After each story the group has 5 minutes to ask any clarification questions and to reflect back something they heard that had meaning. Again a gentle alarm rings to signal that section coming to a close. This process is repeated for each of the three storytellers.

Practitioner's reflection: This process worked very well. It felt like just the right amount of structure to help move things along, without feeling too heavy. Depending on the amount of time you have the stories can be 5 minutes instead of 10.

Small group discussions (25 min)

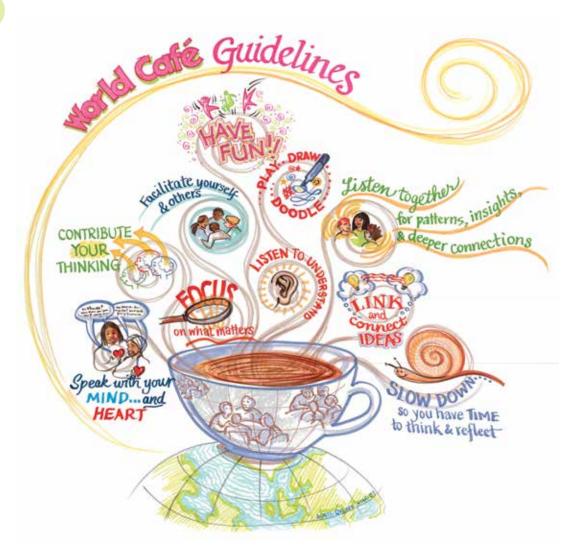
Then the group is split up into small groups based on their lens. They are encouraged to 'host' themselves by making sure everyone has a chance to speak and working to deeply listen to understand. The storytellers also gathered to share their experiences of being heard. Each group is given a harvest sheet to put their three main themes.

World Café Guidelines are a good tool to use during any group discussions to support quality conversations.

⁶There are many options for listening lenses, you can create them, and some others can be found in this guide to Collective Story Harvest:

http://www.arthives.org/sites/default/files/collectivestoryharvesttogo.pdf





Share back (15 min)

Each group shares the themes they found.

As an example, these are the themes we discovered at a storytelling event for community garden coordinators.

Community gardens are a place where:

- o We practice inclusion and integration, of diverse people and experiences.
- o We transform challenging situations into something awesome, bringing community together.
- o We foster friendship, a sense of community, a sense of purpose and community pride.
- o We meet people where they are at, and allow individuals to offer their own unique skills and gifts.

Closing Circle & Evaluation (15 min)

The final activity is a closing circle where you can use an evaluation question such as: what was valuable for you about coming together and storytelling? This gives everyone an opportunity to share their last thoughts and feel a sense of completion for the activity.

What's Next?

Connections and contacts: if you have supported a new group of people coming together they may want to share contact information.

Harvest: some kind of harvest is great to create and send out to the participants after the event. This can be a document with photos and themes, a blog post or a short video.

Examples

Blog post "Telling the Story of Community Gardens", available from: https://adventuresinlocalfood.wordpress.com/2014/02/12/ telling-the-story-of-community-gardens/

YouTube video "Garden Coordinators Storytelling 2013", available from: https://www.youtube.com/watch?v=hk5DqXeUTkU&list=UUvSN-PinxIFY9KCxYngRGWg&feature=c4-overview or available at https://www. ecologyaction.ca/issue-area/food-action

Method # 4: Photovoice

Photovoice was developed by Caroline C. Wang and Mary Ann Burris in the early 1990s as part of a Participatory Action Research (PAR) approach⁷. Photovoice engages people who do not usually have a say in the decisions that affect their daily lives as a way for them to deepen their understanding of an issue. The goal of Photovoice is to support the self-empowerment of participants by providing them with the opportunity to express their experiences and "speak" through photographs about issues that concern them, connect with others in their community, and advocate for change.





I GET MORE EXERCISE



I HAVE VEGETABLES TO FEED MY FAMILY







Evaluation Need

- o Developmental Evaluation: to deepen participants understanding of their own experience and context. To feedback lived experiences into the project to ensure interventions are effective and meeting the expressed need.
- o Summative Evaluation: to gather stories or vignettes of the work in order to make reporting more powerful.

Purpose of the Tool

Photovoice allows people in a community to express the concerns and issues most important and relevant to them. Because "a picture is worth a thousand words", it can be a powerful way to help others understand and connect with the issues.

When to use it

- o When there is a group of people whose stories are unheard.
- o When there is an opportunity to connect to policy makers.
- o When you want to engage and connect the community.
- o When you want to deepen the conversation of an issue in a community.

What makes this evaluation?

Any data collection method can be evaluative if you use an evaluation question. For example in 2014-15 we ran a photovoice project with community gardeners using the question "What does your garden mean to you?" The data collected was directly input into reports demonstrating the impacts of community gardens.

There are three key steps involved in Photovoice:

1. Planning a Photovoice Project: Involves thinking about who needs to be involved, how you are going to recruit participants, the budget and timeline.



HOT TIP. ADAPT THE TOOL FOR YOUR CONTEXT

The great thing about methods like photovoice is that can be very in-depth and happen over the course of a year or more, including photography training. It can also be done successfully in an afternoon.

2. Carrying out a Photovoice Project: Includes introducing Photovoice to the group of participants, reviewing ethical guidelines, developing/discussing themes, providing education about photography and sharing and discussing photographs taken by participants. Each participant is provided with a camera if they don't have one they wish to use. Each participant takes photographs they feel answers the research question/main theme, relating both to their personal experience and aspects of their community's strengths, struggles and collective experiences. In a group setting, participants share the meanings and stories behind the pictures.

Photovoice Hamilton Ontario. (2007). Manual and resource kit. Hamilton: Hamilton Community Foundation.

http://www.naccho.org/topics/infrastructure/mapp/framework/clearinghouse/upload/Photovoice-Manual.pdf



P.H.O.T.O.S.

The main process of discussing the photos is facilitated by the researcher.

The participant shares his/her photograph and caption by answering the following:

- P: Describe your Photo.
- **H**: What is **Happening** in your picture?
- O: Why did you take a photO of this?

The facilitator then encourages the group to discuss the following:

T: Individual Discussion: What does this picture Tell us about your life and your community?

Group Discussion: What does this picture Tell us about food in this community? After all of the photographs have been discussed:

- O: How can this picture provide Opportunities for others to improve the community?
- S: Is there anything else not represented in the photograph that you think is important to **Share**?

Practitioner reflection: These questions may seem too basic, however I've found that starting right from literally describing what is in the photo actually leads to deeper insights. It allows fellow participants to pick up on themes and collectively have a richer experience. As a facilitator, be on point to use probing questions.

3. Exhibiting Photographs and Creating Social Action: Involve the whole group of participants in deciding how they want to share their pictures and stories with others in the community and beyond (e.g., photo exhibit) and think about who they want to reach (target audience) to create social change. It is ok if some participants want to use their photos and others don't.

What's next

Create outreach materials and use them (social media, video, photobook, photo exhibit, postcards etc.).

Have a celebration with the participants in their community and invite local politicians and decision makers.

Examples

See the next two pages for images from the Photovoice in the Garden project done in collaboration with Immigrant Services Association of Nova Scotia (ISANS).

For the whole story see: https://www.ecologyaction.ca/photovoice-garden

For a video of the Photovoice Gala see: https://www.youtube.com/ watch?v=TDM5pYMZLjs

JARDEN

HOTOVOICE IN THE







LANTS AND TALK WITH MY FRIENDS FROM THI My family is spread all over the world WORRY. I GO TO THE GARDEN, WATER THE

BHUTANNEPAL

COUNTRY:



NAME: Dhan Maya Chhetri

GARDEN: Mosaic

Resources

There are many guides to photovoice available online.

Amos, A., Cobb, M., Pabani, N., & Read, K. (2012). Facilitating a Photovoice Project: What you need to know! Available from: http://foodarc.ca/makefoodmatter/wpcontent/uploads/sites/3/VOICES_PhotovoiceManual.pdf

Palibroda, B., Kreig, B., Murdock, L., & Havelock, J. (2009). A practical guide to photovoice: sharing pictures, telling stories, and changing communities. [cited 2012] September 12]. Available from: http://www.youth.society.uvic.ca/sites/default/files/ images/manual.pdf

Photovoice Hamilton Ontario. (2007). Manual and resource kit. Hamilton: Hamilton Community Foundation. Available from: http://www.naccho.org/topics/infrastructure/ mapp/framework/clearinghouse/upload/Photovoice-Manual.pdf

Method #5: Progress Markers

Progress Markers are a way to collaboratively name and envision the way forward in a joint project or intervention. They are behavioural changes that a group would expect to see, like to see, and love to see, based on the interventions. They are revisited at intervals to gauge progress.

The progress markers should advance in degree from the minimum one would expect to see the partner (and community) doing as an early response to the program's basic activities, to what it would like to see them doing, to what it would love to see them doing if the program were having a profound influence.

Individually, progress markers can be considered as sample indicators of behavioural change, but their real strength rests in their utility as a set. Cumulatively, they illustrate the complexity and logic of the change process.8

Evaluation Need

- o Developmental Evaluation: to track and make visible behavioural change over time related to the project interventions.
- o Summative Evaluation: to have a list of attributed behavioural changes of the project or intervention.

Purpose of the Tool

Behavioural change is often difficult to make visible and attributable to a project intervention. This tool is an attempt to name behavioural change that is a direct result of an intervention.

When to use it

This method is often used shortly after beginning work with a new partner. It is a supportive evaluation practice and doubles as a helpful visioning exercise with a new or existing partner. It sets the tone for the way forward for the partnership, as well as bringing staff and the organization together onto the same page. An unintended consequence of this process is galvanizing action within the partner organization.



⁸Earl, S., Carden, F., & Smutylo, T. (2001). Outcome Mapping: Building learning and reflection into development programs. p54. Available from: http://www.naccho.org/topics/infrastructure/mapp/framework/clearinghouse/upload/Photovoice-Manual.pdf



Workshop Template for a 1 hour session

| Time Activity | | Materials | |
|---|-----------------------------|--|--|
| 10 min Introduction & Ice-breaker Describe the Process | | Agenda up on the wall (including an outline of the process) Name tags Markers | |
| 20 min | Small Groups | Sticky notes Markers | |
| 20 min Share back ideas from small groups Group similar ideas | | 3 flip charts: expect to see, like to see, love to see Markers Sticky notes | |
| 10 min | Closing circle & evaluation | Flip chart paper Markers | |

The process of developing progress markers with a community group or partner organization can fit within different time scales from a 30 min activity to an in-depth session of 2 hours. It depends on the context you are working in. If you can get 30 minutes in a staff meeting then use it. If you can invite the partner group to a longer session then do so and go a bit deeper.

Introduction and icebreaker (10 min)

Introduce the activity and get each person to introduce and share their role in the organization and/or in relation to the project.

Small Groups (20 min)

Split the group into small pods of 2-3 where they brainstorm ideas for the three categories: expect to see, like to see, love to see. If you have a very small group then do a silent reflection for 5-10 minutes getting each individual listing ideas (this will ensure that more ideas are generated). Participants write each idea on a different sticky note.

Share back ideas & Group discussion (20 min)

The facilitator works from expect to see up to love to see with the group. Ask for one idea from a group and then ask if any other groups had something similar. Then ask for the next idea. This way you are grouping or theming as you go, creating more of a cohesive set of progress markers. If needed, ask for clarifications, probe with questions and add new ideas to the three flip charts.

Practitioner reflection: Keeping the focus on behavioural change is challenging but important in this process. The facilitator may need to remind the group a few times about this. In theory the purpose of the tool is to measure behavioural change over time, because it is a challenging one to accurately name. Having said that, our community programmers used it for broader indicators than behavioural change and found it very useful (as you can see in the examples below).

Closing circle & evaluation (10 min)

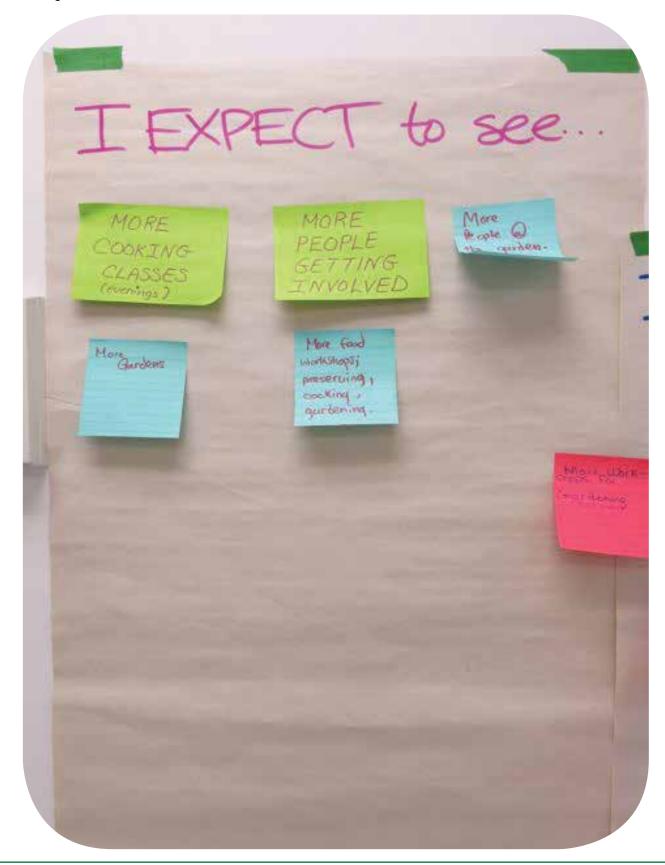
The final activity is a closing circle where you can use an evaluation question such as: what was valuable for you about this activity? what are you taking home with you? what are you most excited about? This gives everyone an opportunity to share their last thoughts and feel a sense of completion for the activity.



HOT TIP. BUILD MOMENTUM FOR THE FUTURE

If you are looking to invigorate a team or initiative, this process is energizing and motivating. It creates a feeling of excitement for the future!

Examples









What's Next?

A monitoring sheet can be created from the exercise to develop progress markers. Depending on the nature of the partner relationship and the interventions, this can be re-visited multiple times a year, every six months, or annually. Each staff member individually fills in a monitoring form (see Appendix VI), and then a group discussion is held, where comments are noted. A master copy of the monitoring form can be created with the aggregated information including any comments and changes (see Appendix VI). This is then used for the next monitoring session.

Resources

Earl, S., Carden, F., & Smutylo, T. (2001). Outcome Mapping: Building learning and reflection into development programs. Available from: http://www.idrc.ca/EN/ Resources/Publications/Pages/IDRCBookDetails.aspx?PublicationID=121



HOT TIP. DOUBLE UP WHERE YOU CAN

Look for those places where you can both reflect internally and collect data for reporting. With two internally to improve effectiveness of achieving results, it can be cumbersome. Sometimes the same tool can provide information to address more than one goal.

Internal Evaluation

How can we be more effective and efficient in achieving our goals?

Method #6: Strategy Journals: tracking outcome achievement

A set of questions completed by project staff on a regular basis (a few times a year), that records observations about the work and the impact of interventions. This journal offers a reflective opportunity yielding useful insights.

Key questions: How is the work going? What do we need to adapt?

- 1. Awesome: what are we doing well?
- 2. Less Awesome: What are we doing not so well?
- 3. Change: what do we need to add or subtract?
- 4. What is the most significant change you've observed?
- 5. What practices/interventions have been adopted by other communities?
- 6. How has our work changed practices of practitioners?
- 7. Emerging Issues: have you noticed any that might affect our work?
- 8. Responding: how have/are/should we be responding?
- 9. Gaps: anything we need to evaluate further?

Evaluation Need

- o Developmental Evaluation: to learn through the reflective activity of journalling. To record observations of impact and learn through what you uncover. To share within a team and with partners in order to understand the context better and adapt interventions accordingly.
- o Summative Evaluation: to collect observational data about project impacts for reporting.

Purpose of the Tool

The strategy journal is a tool designed to monitor the actions in support of partnerships and overall project mandate. In other words, this is a method of keeping track of the effects we observe of our interventions. This tool is based on the assumption that the project is willing and ready to change along with it's target groups (partner sites, communities, organizations) based on understanding how the context is changing how well the interventions are leading to change.





HOT TIP. DESIGN THE TOOL FOR YOUR **CONTEXT**

The original tool can be changed and adapted based on your context. Different times of year or reporting time may call for different questions or added questions. For example, you can add some questions that your funder requires in reporting, or ask particular questions to reflect on if your team is in a major point of change or decision.

When to use it

This journal can be completed a few times a year (1-3). The utility of the tool is maximized by having some kind of discussion or activity for staff after completing it. This could be a one-on-one discussion between a manager and a staff member about the insights and how to adapt the work. This could also be a larger team retreat, pulling out themes and creating action plans if and where necessary.

Examples: See Appendix VII for an example.

What's Next?

Keep an electronic file for completed strategy journals. There may be content to pull into reports. When there is staff turnover, strategy journals can transfer knowledge to the new staffer in a more concrete manner that is easier to understand than discussion alone. Strategy journals can also be used as a reference resource and a preparation for a team retreat, see below for information about team retreats.

Resources

Earl, S., Carden, F., & Smutylo, T. (2001). Outcome Mapping: Building learning and reflection into development programs. Available from: http://www.idrc.ca/EN/ Resources/Publications/Pages/IDRCBookDetails.aspx?PublicationID=121

Method #7: Performance journals look at organizational practices

A set of questions completed by project staff on a regular basis (a few times a year), that records how an organization is working to fulfill its mandate. This journal offers a reflective opportunity yielding helpful insights.

Evaluation Need

- o Developmental Evaluation: to learn through the reflective activity of journalling. To make visible or make conscious what practices you use to be an effective part of a team and/or what practices a team is using or not using. To make visible the gaps and take the opportunity to adjust and adapt practices accordingly to be more effective and efficient.
- o Summative Evaluation: to collect data about project practices that support or inhibit effectiveness.

Purpose of the Tool

The performance journal is a tool designed to record data over time on how an organization is operating to fulfill it's mission.

Are we working in ways that foster innovation and moves us towards greater impact? How well are we doing? How can we improve? The Performance Journal includes eight key areas to reflect on:

- 1. New ideas, opportunities & resources
- 2. Feedback from key informants
- 3. Support from next highest power
- 4. Assessing and redesigning products & systems
- 5. Checking-in on those already served to add value
- 6. Sharing best wisdom with the world
- 7. Experimenting to remain innovative
- 8. Engaging in organizational reflection

When to use it

This journal can be completed a few times a year (1-3). The utility of the tool is maximized by having some kind of discussion or activity for staff after completing it. This could be a one-on-one discussion between a manager and a staffer about the insights and how to adapt the work. This could also be a larger team retreat, pulling out themes and creating action plans if and where necessary.

Example

During our first staff retreat with a new team we brainstormed practices. (See Appendix VII for full example).



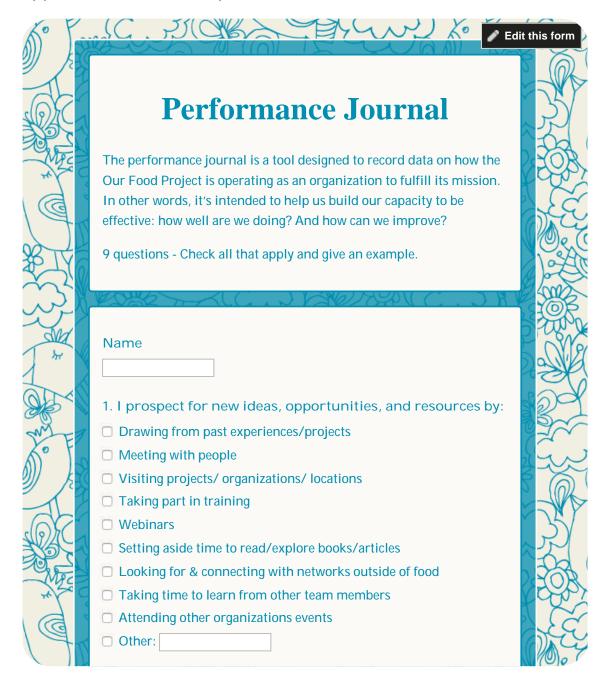


HOT TIP. MAKE IT FUN!

Making tools beautiful, fun and interactive greatly increases participants' experience, therefore the effectiveness of it as a reflection tool and increases the quality of results. It's worth the time and energy.

Example

Google forms is a great tool. Not only is it visually pleasing, but with one click it creates a summative report from the data. This makes it easy to pull out themes and trends. (See Appendix VII for full example).



Resources

Earl, S., Carden, F., & Smutylo, T. (2001). Outcome Mapping: Building learning and reflection into development programs. Available from: http://www.idrc.ca/EN/ Resources/Publications/Pages/IDRCBookDetails.aspx?PublicationID=121

Method #8: Team retreats

Team retreats are when staff take time away from regular work activities and tasks to participate in a range of activities and discussions relevant to the work. Lasting 1-3 days in duration. They involve a mixture of team building, social time, personal and professional reflection and learning, concrete workplanning, and bigger picture thinking (e.g., strategic directions, partnerships, funding, visioning).

Evaluation Need

- o Developmental Evaluation: to integrate insights from reflective activities (such as the strategy and performance journals), collectively make sense of them and make a plan for adapting programming in a responsive manner.
- o Summative Evaluation: to report on emerging issues and document the evidence behind adapting programming from the original planned course.

Purpose of the Tool

In the day-to-day of the project, it is difficult to do the important work of taking stock of changes in the landscape, and adapting programming. Team retreats are an incubation space that support teams in understanding where their relevance lies. The purpose is to remain relevant and effective; to continually adjust your compass to a true need.

When to use it?

A few times a year (1-3). If you are involved with a highly adaptive innovative project then the more the better to ensure you are staying on course. Less often if you are a more stable project experiencing less changes in the landscape of the work.



HOT TIP. DO THE PREP WORK IF YOU WANT TO GET FURTHER

The strategy and performance journals are invaluable for setting up a team to get the real work done at the retreats. Often you can spend a lot of time just trying to figure out where you are and what you need to talk about. These tools do this groundwork to make the time you have together more effective and productive



Practitioner reflection: In the beginning of the project taking these retreats felt like too much time from everyone's busy schedules. As the project is going into year 3, the team feels very positively towards them, because they feel productive and provide time to work with the real challenges that we face.

Facilitation is important

Having skilled facilitators (internal or external to the team) and using methods developed to open up meaningful conversation allow teams to move through topics more quickly and deeply, yielding higher quality results. Some tools to use and train in as a team include: Art of Hosting (including: ProAction Café, World Café), Deep Democracy, Appreciative Inquiry, and Storytelling.



HOT TIP. MAKE TIME FOR IT

Evaluation and reflection take time. The time you put into it is reflected in the results you get out of it.

What's Next?

Creating a harvest report from the retreat is a great way to capture the journey and any decision points as a reference document. Taking pictures of the retreat setting and flip charts created is also a good reference. Often pieces of a team retreat work well and can be repeated at subsequent retreats, good facilitator's plans and notes can be re-used, making planning easier each time.



Creating a Culture of Evaluation

Using many of the tools in this document together support the creation of an evaluation culture within a team, also referred to as a learning culture. The more evaluation tools are used, the more practice staff members have of reflecting on the work. Team retreats offer the space and training grounds for integrating the learnings and insights back into the work.

Practitioners reflection: There has been an incredible shift in the culture of our team over the two years together. Using the journals and the team retreats has caused us to approach the work differently. Team members are asking themselves: "What impact does my work have?" more often and at different scales. This reflective action increases the probability of such interventions remaining relevant by responding to community needs and opportunities in the system's landscape.







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APPENDIX I

Surveys I. One-time workshop surveys, or feedback forms.

This survey was created for cooking and gardening skills workshops. With that in mind, question #5 is included to shed light on how well the workshop equipped the participants to carry out the skill on their own. This may not be relevant for all types of workshops.

| Workshop Feedback Form | | | | | |
|--|-----------------------------------|-----------------|------------|----------|--|
| 1. One word | to describe today | 's workshop is | | | |
| 2. What did y | ou like about the v | vorkshop? | | | |
| 3. What did y | 3. What did you not like as much? | | | | |
| 4. What was the most important thing you learned today? | | | | | |
| 5. How likely are you to do this again after the workshop? (circle one) And why? | | | | And why? | |
| | Very likely | Somewhat likely | Not likely | | |
| 6. Any other | comments? | | | | |



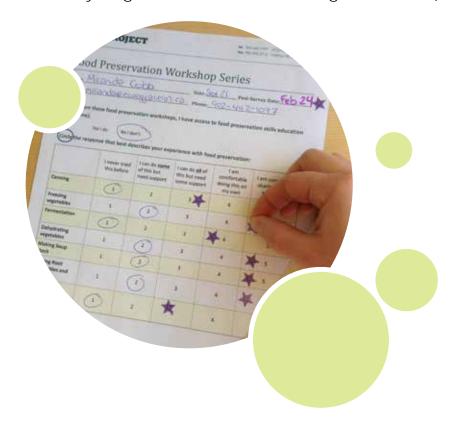


APPENDIX II

Surveys II. Pre and Post Surveys

This survey was created for a workshop series (food preserving) involving a consistent set of participants over a bound timeframe (the fall harvest season). By designating each answer on the scale a point (1 - I never tried this before to 5 - I am comfortable sharing this skill with others) the change in skill level over time can be quantified.

The workshop participants are handed back their original form for the post-survey. In this way they demonstrate the change they feel over time relative to their first workshop. This can correct for some ambiguity in the scale. Try using different coloured pens for the pre and post surveys, types of stickers, shapes, or putting a 1 and then a 2, anything to differentiate the change over time (see photo for example).





tel. 902.442.1077 2705 Fern Lane, fax. 902.405.3716 Halifax, NS, B3K 4L3

Food Preservation Workshop Series

| Name: | Date: | Post-Survey Date: | |
|---------|--------|-------------------|--|
| F-mail: | Phones | | |

Apart from these food preservation workshops, I have access to food preservation skills education (circle one).

> Yes I do No I don't

(Circle) the response that best describes your experience with food preservation:

| | I never tried this before | I can do <u>some</u> of this but need support | I can do all of this but need some support | I am comfortable doing this on my own | I am comfortable sharing this skill with others |
|--|------------------------------|---|---|--|---|
| Canning | 1 | 2 | 3 | 4 | 5 |
| Freezing vegetables | 1 | 2 | 3 | 4 | 5 |
| Fermentation | 1 | 2 | 3 | 4 | 5 |
| Dehydrating vegetables | 1 | 2 | 3 | 4 | 5 |
| Making Soup Stock | 1 | 2 | 3 | 4 | 5 |
| Storing Root Vegetables and squash | 1 | 2 | 3 | 4 | 5 |
| Cooking with foods you preserved | 1 | 2 | 3 | 4 | 5 |

ecologyaction.ca/ourtood



1













tel. 902,442,1077 2705 Fern Lane, fax. 902,405,3716 Hallfax, NS, B3K 4L3

POST SURVEY: Please do not complete until after this workshops series.

1. What was your favourite workshop? (Please rank in order from 1-6; 1 being your favourite, 6 being our least)

| Car | anning | |
|-----|---|-----------------------|
| Fre | reezing | |
| Fer | ermentation | |
| De | ehydration | |
| | oup Stock | |
| Sto | toring root vegetables | |
| | | |
| 2. | . What are the top two things you learned from these workshops? | |
| 3. | . Will you try some of the above ways to preserve food on your own or with a friend | ? (circle yes or no) |
| | Yes/No | |
| | If yes, what food preservation techniques? Check all that apply: | |
| | Canning | |
| | Freezing | |
| | Fermentation | |
| | Dehydration | |
| | | |
| | Soup Stock | |
| | Storing root vegetables | |
| | If no, why? | |
| | | |
| 4. | . Is there anything about food preservation that you want to learn more about? | |
| | | |
| | | |
| IAH | ANK YOU! | |
| | | |
| COL | ologyaction.ca/ourtood 2 | Ecology Action Centre |

APPENDIX III

Surveys III. Surveys measuring change

The 'Do You Eat Vegetables?' Survey was created to track a change in vegetable consumption in relation to food skills programming and community gardens. This particular survey was rolled-out as a short interview, where a volunteer would go to community gardens and ask the questions one-on-one. This method was best here because we are using 'serving sizes' (based on Canada's Food Guide) which can be difficult for people to relate to. This interview-style design supported more accurate results by having the option to demonstrate and explain what a serving size looks like. Another option would be to have photos of a serving size.





'Do You Eat Vegetables?' Survey

| Name: | Date: |
|---|---|
| Garden and location: | Name of survey-er: |
| Because of the garden a vegetables: | nd food workshops, has your consumption of b. Stayed the same (skip to Q3) c. |
| 2. On average, how many a. 1-3 servings | more vegetables do you eat per day? c. 5-7 servings |
| b. 3-5 servings | d. 8+ servings |
| 3. Without the garden & food v | workshops I eatservings of vegetables per day, with themer day. |
| 4. Please describe a meal y | ou've made with vegetables this week: |
| 5. How many friends and/c skills with, if at all? | or family members do you share your garden & cooking |
| a. None (skip to C | 28) |
| b. 1-3 people | d. 6-9 people |
| c. 3-6 people | e. 9 or more people |
| 6. Has their consumption of | vegetables: |
| a. Increased b. Sta | ayed the same (skip to Q3) c. Decreased (skip to Q3) |
| 7. What is your best guess fo | or how many more vegetables they eat per day? |
| a. 1-3 servings | c. 5-7 servings |
| b. 3-5 servings | d. 8+ servings |
| • | Vithout the garden & workshops they eat servings of em they eat servings per day. |
| 9. Can we contact you in the | ne future to learn about your experiences? If so: |
| Email/phone | |
| | Thank you! |

APPENDIX IV

Surveys IV. Annual program surveys

This survey was designed to be completed once a year by all participants of our community garden sites and food growing workshops.

Annual Program Survey

Community Gardeners and Workshop Participants

Circle the answer

Because of the food and garden workshops, and the garden:

- 1) My gardening skills have...
 - a) stayed the same
 - b) increased
 - c) decreased
- 2) My healthy and seasonal cooking skills have...
 - a) stayed the same
 - b) increased
 - c) decreased
- 3) My preserving and/or food storing skills have...
 - a) stayed the same
 - b) increased
 - c) decreased
- 4) Please give an example of a skill you have learned and used:
- 5) My confidence with gardening has...
 - a) stayed the same
 - b) increased
 - c) decreased
- 6) My confidence to cook healthy meals has...
 - a) stayed the same
 - b) increased
 - c) decreased
- 7) My confidence to preserve and/or store food has...
 - a) stayed the same
 - b) increased
 - c) decreased









8) If your confidence has increased, please share an example

Choose as many as you like

- a) I cook more healthy meals at home
- b) I share my recipes with others
- c) I share my meals or preserves with others
- d) I make more healthy food choices
- e) I try new skills
- f) I help others in the garden
- g) I experiment more

| h) Other | | |
|--------------|--|--|
| \mathbf{n} | | |

9) I have gained skills with the following food and garden infrastructure...

Choose as many as you like:

- a) Garden shed
- b) Garden tools
- c) Cold frame
- d) Greenhouse
- e) Composting bin
- f) Watering systems (e.g., rain barrels, water tank)
- g) Root cellar
- h) Seed bank
- i) Raised beds
- j) Kitchen
- k) Cooking implements

| 1) | Other | | | | |
|----|-------|--|--|--|--|
| | | | | | |

- 10) I use food and garden infrastructure
 - a) the same amount
 - b) more
 - c) less
- 11) My access to healthy food has...
 - a) stayed the same
 - b) decreased
 - c) increased
- 12) Any comments you wish to share?

APPENDIX V

Method #3: Storytelling Circle

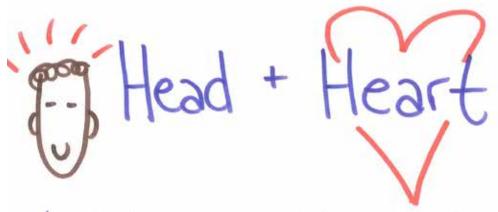
Listening Lenses

Here are some examples of listening lens harvest sheets to print off and try with a group. Get creative with different lenses depending on what the theme of your storytelling is.









At what moments did the head or the heart take the lead?

Principles of working can be gleaned from this story?

Magic + Synchronicity.

When were the moments of magic and synchronicity?
What happened during this story that pointed to synchronicity and the magic in the middle?







2/



Pivotal Moments Highlights

Magic + Synchronicity Highlights

1

2

3

APPENDIX VI

Method #5: Progress Markers

Monitoring Sheets

These are examples from a community in Halifax for just the expect to see portion. The first shows the results of the group brainstorm all typed up and themed. The second shows the results from a monitoring session with the answers from each individual aggregated.



Progress Markers: Monitoring the extent of Behavioural Change

| | Todaw's date: | Date of next check-in: |
|---|---|--|
| Working date from/to: | roday 3 date: | |
| Description: By revisiting the Progress Markers, we collaboratively decide the approximate extent of behavioural change we have observed: LOW - 0-40% of the population? MEDIUM - 41-80% of the population? HIGH - 81-100% of the population? Tick the appropriate boxes and add comments. This is also a time to adjust the Progress Markers as your understanding or the context has shifted. | ollaboratively decide the ap OIUM - 41-80% of the populat a time to adjust the Progress | rogress Markers, we collaboratively decide the approximate extent of behavioural change we of the population? MEDIUM - 41-80% of the population? HIGH - 81-100% of the population? Tick comments. This is also a time to adjust the Progress Markers as your understanding or the context |

| Comments | are | |
|--|--|--|
| ς the box. %) | we EXPECT to see | |
| LEVEL OF CHANGE To what extent have you observed this behavioural change? Tick the box. L \square M \square H \square (Low = 0-40%, Medium = 41-80%, High = 81-100%) | ${ m EXPECT~TO~SEE}$ - The behavioural changes we ${ m EXPECT}$ to see are | BW Staff: A. All staff to be on the same page and to be involved B. knowledgeable about EAC Our Food partnership and programming C. encouraging greater participation in food and gardening programming, including promoting HUGS Integrating Centre programming with garden programs, such as: |

Progress Markers: Monitoring the extent of Behavioural Change

Contributors (organizations & individuals):_Will, EAC; Staff BW (Donna and 4 staffers, Mary, Cheryl, Amanda, Karen

Date of next check-in:_TBD Today's date: May 30th, 2014_ Working date from/to:_Dec 2013-May 2014_

Description: By revisiting the Progress Markers, we **collaboratively decide the approximate extent of behavioural change we have observed:** LOW - 0-40% of the population? MEDIUM - 41-80% of the population? HIGH - 81-100% of the population? Tick the appropriate boxes and add comments. This is also a time to adjust the Progress Markers as your understanding or the context has shifted.

| | LEVEL OF CHANGE | | Comments |
|----|---|------------------|---|
| | To what extent have you observed this behavioural change? Tick the box. L \square M \square H \square (Low = 0-40%, Medium = 41-80%, High = 81-100%) | he box.) | |
| | EXPECT TO SEE - The behavioural changes we EXPECT to see are | ve EXPECT to see | are |
| 4. | BW Staff: | | (Donna) In terms of staff members things |
| | ff to be on the same page and to be involved | L2 M1 H1 | have improved: Since Jan there has been |
| | e about EAC Our Food partnership and | L∐ M4 H1 | has improved"; "having that meeting |
| | | | certainly helped" [Dec? 2013 EAC progress |
| | and gardening | L IMI4 III | markers staff meeting] |
| | | | Action ideas: 1. put garden updates on the |
| ъ. | | L4 M H | BWFRC board for staff and community; 2. |
| | D. Home visitors taking families on 'field trips' to HUGS garden | .1 M3 H□ | get BW staff on the HUGS listserve; 3. Will |
| | E. Ready, Set, Go – plant and care for plants; have garden | | to create a garden manual for BW staff |
| | the garden | L M4 H | |
| | erall |] | Work ahead is broader engagement piece |
| 9. | 6. Community: | M | for the community |
| | A. greater participation and involvement in HUGS garden | ر د | |
| | B. Increased skills in gardening, cooking & preserving (Logic Model | | Lots of energy has gone towards the |
| | | - | physical space; Actively worked on |
| 4. | 4. Garden space – child friendly and safe | L M 3 H I | aesthetic & child safety (less rubbish/less |
| | | | nails in wood etc.) |

APPENDIX VII

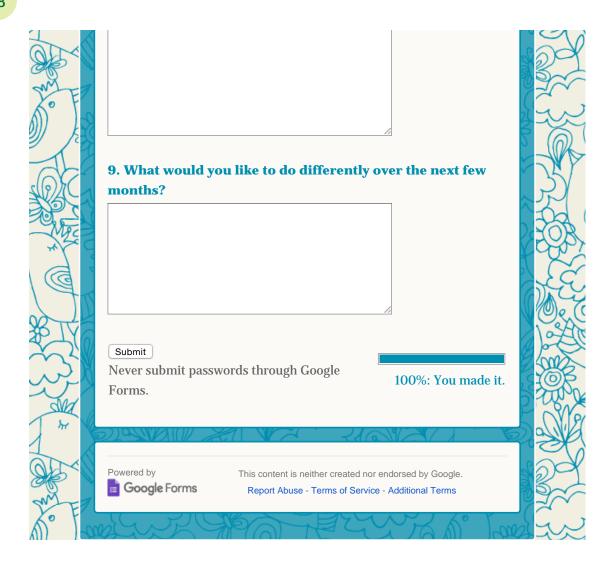
Method #7: Performance Journals Example Template⁹

| | C. TICHES Ed | it this form |
|------|---|---|
| | Performance Journal The performance journal is a tool designed to record data on how the Our Food Project is operating as an organization to fulfill its mission. In other words, it's intended to help us build our capacity to be effective: how well are we doing? And how can we improve? 9 questions - Check all that apply and give an example. | |
| | PSS2 - CC. J MONTER C. J KI | |
| | Name | |
| 95 | 1. I prospect for new ideas, opportunities, and resources by: | |
| M | ☐ Drawing from past experiences/projects | |
| No F | ☐ Meeting with people | |
| | ☐ Visiting projects/ organizations/ locations | |
| 1 | ☐ Taking part in training | |
| | Webinars | |
| | | \mathcal{A} |
| | ☐ Setting aside time to read/explore books/articles | |
| | Setting aside time to read/explore books/articles Looking for & connecting with networks outside of food | |
| | Looking for & connecting with networks outside of food Taking time to learn from other team members | |
| | Looking for & connecting with networks outside of food Taking time to learn from other team members Attending other organizations events | 1,500 to |
| | Looking for & connecting with networks outside of food Taking time to learn from other team members | |
| | □ Looking for & connecting with networks outside of food □ Taking time to learn from other team members □ Attending other organizations events □ Other: □ | |
| | Looking for & connecting with networks outside of food Taking time to learn from other team members Attending other organizations events | 3100 (V) (S) (S) (S) (S) (S) (S) (S) (S) (S) (S |
| | □ Looking for & connecting with networks outside of food □ Taking time to learn from other team members □ Attending other organizations events □ Other: □ | |

| m | 2. I seek feedback from key informants - participants, | |
|---|--|---------------|
| Xo F | partners, communities through: | G |
| 6))) } | Keeping open lines of communication with partners (in-person, | |
| | phone, e-mail) | |
| | Informal conversations/feedback after workshops and programs | ZA & |
| | Formal evaluation with each partner/community | \mathcal{L} |
| | Communication/Informal conversations/ relationship building | |
| Mac | with other relevant groups/organizations/individuals | ROE |
| * | □ Other: | |
| ा त्वं | | |
| 1 9 | Key example(s) or highlight(s) in this area: | |
| 00 | | W (19) 8, (C |
| \$P_1\(\begin{array}{c} \begin{array}{c} \\ \\ \\ \\ \\ \\ \\ \\ \\ \\ \\ \\ \\ | | TEC ! |
| ~ C | | Sam? |
| ~~~\\ | | |
| dV | | 2000 |
| 74 | | 201/20 |
| 1 | | |
| OTH | 3. Strategic contacts: I work to obtain the support of | 1 |
| | decision makers that affect the work we do and the goals we are working towards through: | 35 |
| 20 E | 10.00 | |
| $M_{\tilde{a}}$ | Building and maintaining regular contacts within bureaucracy (keep up with turnover) | |
| | Building and maintaining regular contacts with politicians (keep | |
| 1 | up with turnover) | |
| | ☐ Advisory Board activites | 5 |
| | Photovoice and other media/messaging connecting to decision | |
| Mac | makers | ROE |
| m/ | Map out and know who our strategic contacts are | A COOL |
| 1 @ N | Meetings, e-mails, communications with strategic contacts | 2 / C |
| 1 7 | Other: | |
| 00 11 | | W. O. S. C. |
| \$P_7/\ | Key example(s) or highlight(s) in this area: | TESO ! |
| ~~~ | | m |
| ~~~ | | |
| dVa | | |
| 7 4 | | 5 allies |
| 1 | | |
| 9 DX | | |

| | 4. Based on feedback (from partners, strategic contacts, community and the changing context), and gathering new | 35 |
|-------|---|------------|
| Mac | ideas: I asses products/services/systems & procedures | 308 |
| W IV | ☐ I re-design as needed ☐ Other: | |
| | Key example(s) or highlight(s) in this area: | |
| 1" | | |
| The F | 5. I learn lessons from my work (past and present) by: | |
| | Checking up on initiatives (e.g., built composter, gave workshop, strategic planning process etc.) | |
| | Adding value to existing infrastructure, programs, services, and systems | 35) |
| | Other: Key example(s) or highlight(s) in this area: | |
| | | |
| | | |
| | 6. I share my best wisdom with the world by: | |
| 7 " | ☐ Offering my experience and knowledge to internal team processes | |

| OF ! | and decisions (co-design sessions, team meetings, team retreats, informal conversations etc.) | |
|---------|--|-------------|
| WY F | Offering my experience and knowledge to broader EAC and FAC | |
| € 1 | Offering my experience and knowledge to partners/community etc. | |
| | □ Other: | |
| 1 | | |
| | Key example(s) or highlight(s) in this area: | 354 |
| | | |
| Mec | | 2008 |
| M | | |
| | | 2 6 |
| 1 | | 1 |
| 92 TV | | West (|
| | 7. I experiment to remain innovative through: | |
| 5 | ☐ Piloting new ideas, directions, partnerships | |
| | ☐ Demonstrating an open mind | |
| 1 37 | Professional development & applying ideas from other sectors to our work | CYP |
| | Other: | |
| OTE ! | other. | |
| | Key example(s) or highlight(s) in this area: | 3 5 |
| 20 F | | |
| b)))] | | |
| | | |
| | | Z ZX |
| #W. T. | | N/ |
| | | 322 |
| 70,25 | 8. I engage in organizational reflection through: | 4500 V |
| d | ☐ Team retreats | 7 |
| 1 9 | Ongoing team conversations | |
| 00 | ☐ Taking time to reflect on specific practices as needed | (() |
| \$P_T/\ | Filling out tracking forms regularly (PERT, workplan updates, | 1000 |
| 3 | dispatch) | Smy |
| | Other: | |
| SVA | Key example(s) or highlight(s) in this area: | No. |
|) hr | neg campic(s) or inginigit(s) in this area. |) alily |



APPENDIX VIII

Method #6: Strategy Journals Example Template¹⁰

| Inquiries | Comments (consider each aspect of your work) |
|---|--|
| Awesome: What are we doing well and what should we continue doing? | |
| Not awesome: What are we doing "okay" or badly and what can we improve? | |
| Change-Add: What strategies or practices have we added and what do we need to add? | |
| Change-Subtract: What strategies or practices have we given up and which do we need to give up? (require too much effort, produce no results, use too many resources relative to results obtained)? | |
| What is the most significant change you have observed in the community? How did our work inspire this change? | |
| Adoption by other communities: Give an example of increased knowledge and capacity in the communities/partners you work with. | |
| Changing behaviour: Give an example of how your work has changed the practices of practitioners, professionals and/or service providers? | |

⁹Adapted from: Earl, S., Carden, F., & Smutylo, T. (2001). Outcome Mapping: Building learning and reflection into development programs. Available from: http://www.idrc.ca/EN/Resources/Publications/Pages/IDRCBookDetails.aspx?PublicationID=121

| Emerging Issues: Have you noticed any emerging issues in the community that might affect project activities? (e.g., new municipal bylaws, funding or policy changes, new programs or migration) | |
|---|--|
| Responding: How have/are/should we be responding to the changes in partner's behaviour and/or emerging issues? | |
| Take it further: Has any issue come up that we need to evaluate in greater depth? What? When? Why? How? | |

¹ºAdapted from: Earl, S., Carden, F., & Smutylo, T. (2001). Outcome Mapping: Building learning and reflection into development programs. Available from: http://www.idrc.ca/EN/Resources/Publications/Pages/IDRCBookDetails.aspx?PublicationID=121