Principles-Focused Evaluation

The GUIDE

Michael Quinn Patton

The Developmental Nature of Effectiveness Principles

A Case Example of Adapting Principles in Practice

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This chapter presents the intersection of two sets of principles: principles for dialogic engagement with complex systems and developmental evaluation principles, each adapted to a particularly emergent situation, a challenging context, a high degree of uncertainly, and the dynamic interrelationship with the other set of principles. I know that's quite abstract, but what this meant in the real world of an innovative journalistic undertaking will all become clear, or at least clearer, shortly. To appreciate both the substance of this chapter and its positioning at this point in the book, a quick review will help.

Part I (Chapters 1–5) presented the purpose and niche of principles-focused evaluation. Part II opened with the GUIDE framework for effectiveness principles, presented in Chapter 6: A high-quality principle (1) provides guidance, (2) is useful, (3) inspires, (4) supports ongoing development and adaptation, and (5) is evaluable. Chapters 7–11 provided guidance for developing and distinguishing effectiveness principles, essentially elaborating the *G* (guiding) criterion in the GUIDE framework. Chapters 12–14

focused on the *U* (useful) standard for effectiveness principles. Chapters 15–18 provided examples of the inspiring (I) nature of meaningful effectiveness principles. That brings us to the developmental (D) characteristic of effectiveness principles.

> The developmental nature of a high-quality principle refers to its adaptability and applicability to diverse contexts and over time. A principle is thus both context sensitive and adaptable to real-world dynamics, providing a way to navigate the turbulence of complexity and uncertainty. In being applicable over time, it is enduring (not time-bound), in support of ongoing development and adaptation in an ever-changing world.

This chapter provides a case example that illuminates the developmental and contextually

adaptable nature of principles. This principles-focused case has been prepared by two of the primary people involved, Peggy Holman, in the role of co-designing and facilitating the innovation process, and Yve Susskind, in the role of principles-focused developmental evaluator. I played a consultative role as the process and the evaluation unfolded. I asked Peggy and Yve to introduce themselves to you, after which they tell the story in a highly creative, emergent, and developmental way. I would only add that this example illustrates all of the GUIDE criteria, but I am placing it at this point in the book because it so engagingly portrays, highlights, and illuminates the developmental nature of effectiveness principles.

—M. Q. P.

The Intersection of Engagement and Developmental Evaluation Principles in the Experience Engagement Conference

Meet Peggy Holman

My work with dialogic practices took off in the early 1990s when I experienced Open Space Technology, a process that enables groups of any size to self-organize around complex, even conflicted, and important issues. I saw Open Space as a means to liberate spirits and make space for breakthroughs to emerge by engaging a diverse group that cared. It led me on a journey to learn about these strange system-oriented, high-participation practices in which the needs of individuals and needs of the whole could both be met.

To pursue my quest, I spearheaded the creation of two editions of *The Change Handbook* (Holman, Devane, & Cady, 2007), an anthology that showcases these practices. We moved from 18 to 61 methods between the two editions, in 1999 and 2007. That explosive growth led me to write *Engaging Emergence: Turning Upheaval into Opportunity* (2010), which articulates the underlying principles that inform my approach to design and hosting.

I began working with journalists in 1999 because of a racially motivated shooting that got me thinking about the role of stories in shaping our worldviews and actions. I wanted to take what I knew about engagement and storytelling and work with journalists—our cultural storytellers. Several journalism colleagues and I formed Journalism That Matters (JTM), a nonprofit that convenes conversations to foster collaboration, innovation, and action so that a diverse news and information ecosystem supports communities to thrive.

Meet Yve Susskind

In my consulting business, Praxis Associates LLC, I collaborate with nonprofits, community-based leaders, and activists to collect data and think critically about their work and the results they are achieving in order to continually build effective strategies and programs for organizational and social transformation. In my 53rd year on the planet, I now recognize that I am most comfortable living on the edges—socially, professionally, and personally. It has never seemed natural to me to separate evaluation from design and creation. It just makes sense to me that the processes of reflection, learning, questioning, trying, inventing, experimenting, and refining happen in an integrated way.

Imagine my delight when I discovered that there is a "legitimate" approach (books are written about it!) to evaluation that aligns with how I have been working all along but felt like I couldn't tell anyone about! What I love about developmental evaluation is that it uses the natural human tendency toward integrating doing and learning (action and reflection, a.k.a. praxis) to support social

innovation and problem solving. I now work primarily with organizations that already understand that they are in the midst of change and are seeking to learn from and harness the feedback that comes from trying new things. I understand that cycle of evaluation/planning/reflection (i.e., praxis) to be a dialogic process, and so writing this chapter with Peggy has been profoundly liberating for me.

JTM and the Experience Engagement Conference: Principles in Practice

When issues are complex, answers unclear, and people hold passionate and conflicting perspectives, thinking you know the optimal course of action is at best foolish and at worst destructive. So what do you do when you don't know what to do?

JTM embraces disruption by creating a generative space in which people's differences become a source for innovation. The story of Experience Engagement (EE), a conference co-hosted by JTM that brought journalists and community members together, illustrates the approach. While JTM has designed and hosted highly participative conferences—often called "unconferences"—since 2001, this was the first time that developmental evaluation played a role in making innovations visible and extending the reach of a conference.

This chapter is about the intersections we discovered between the principles that guide JTM's conference design and the principles of developmental evaluation. (*Note:* The developmental evaluation principles are presented in Chapter 5, Exhibit 5.4, p. 30.) JTM's conference design includes *hosting practices*. We use the term *host* instead of *facilitator* because facilitator implies you are external to what is happening. In truth, there is no outside. Hosting acknowledges that you, too, are a participant, bringing your skills and consciousness, and can be changed by the experience. Our experience confirmed our hunch that these two sets of principles are complementary and mutually supportive.

This chapter is presented as a dialogue between the authors, one of us being a systems change practitioner and the other an evaluator. The dialogue unfolded as we made sense of the experience we shared in designing, hosting, and developmentally evaluating the EE conference. Peggy brings her perspective from 20 years of working with and writing about dialogic practices suited to addressing complex, even conflicted situations. Yve is an evaluator specializing in understanding and strengthening the processes and results of social-change-oriented organizations. The perspective Yve brings to this chapter is informed by the rare (and joyous) collaboration with partners whose conscious, principled approach naturally reinforces the processes and principles appropriate for evaluating emergent, complex situations.

Peggy's sections provide background on JTM and the EE conference. They use dialogic principles from her book *Engaging Emergence: Turning Upheaval into Opportunity* (2010) as enacted in the EE conference. Yve's sections, which are presented in boxes, point out the intersections of the two sets of principles. Within the boxes, developmental evaluation principles are in **bold** and dialogic principles are in ***bold italics***.

Some Context

Since 2001, JTM has convened conversations that have enabled people across the "whole system" of journalism—journalists, media reformers, educators, students, technologists, and others who care about the role of news and information in civil society—to reimagine journalism that serves the needs of communities and democracy. We began convening these gatherings, with Open Space Technology at their heart, because, like many structures of civil society, journalism is in the midst of a death and rebirth, grappling with its role and relevance. As a process that invites people to self-organize

by taking responsibility for what they love as a means to address complex, important issues (Owen, 2008), Open Space was ideally suited to reimagining journalism's future.

We've known from feedback from people who attended our conferences that we've made a difference. But we were searching for a way to (1) extend that reach from the fortunate few who could attend our face-to-face events and (2) make the impact of our work more visible. Because our approach to hosting is dialogic—based on a theory that change occurs through the conversations we have, the stories we tell, and the generative images that emerge—we sought an approach to evaluation that mirrored the emergent nature of our hosting practices. Developmental evaluation seemed promising.

We began our journey with a call to Michael Quinn Patton, who affirmed our suspicions that the underlying principles that guide our approach to process design married well with the principles of developmental evaluation. We were also fortunate to discover an evaluator, Yve Susskind, who brought an instinct for working with the uncertainty that is a given when designing a process intended to encourage breakthroughs in thinking and practice to emerge. With Michael as an adviser and Yve at our side, our work began.

Principles for Designing Dialogues

My quest to understand the principles of successful dialogues led me to study complexity science and to connect it to my experience with groups. I discovered a pattern that I could reliably work with, even though specific outcomes were unpredictable.

Warning: While the description that follows may sound neat, tidy, and linear, that's far from the case. That just makes it easier to read.

In brief, a disturbance (chaos) interrupts the status quo. In addition to natural responses, like grief or fear or anger, people differentiate—take on different tasks. For example, in an earthquake, while many are immobilized, some care for the injured, others look for food and water. Someone creates a "find your loved ones" site on the Internet. A few blaze the trails and others follow. They see what's needed and bring their unique gifts to the situation. A new order begins to arise. This pattern of change flows as follows:

▶ *Disruption* breaks apart the status quo.

▶ The system *differentiates* and, through random encounters, surfaces innovations and distinctions among its parts.

▶ As different parts interact, a new and more complex coherence arises. See Exhibit 19.1.

The following principles inform my approach to engaging with disruption, differentiation, and coherence. In essence, they support *pioneering,* better equipping people to enter into the mystery of not knowing outcomes in advance in hopes of achieving breakthroughs and creating innovations:

▶ Disrupt *compassionately* by creating a space for dialogue through:
  ▷ Asking meaningful, generative, bold questions.
  ▷ Inviting the diversity of the people and perspectives in the system.
  ▷ Welcoming who and what shows up.

▶ *Encourage random encounters* by crafting opportunities for individual expression and connection.
  ▷ *Reflect collectively to seek meaning* and emerging coherence, calling forth novel *simplicity* on the other side of complexity.
  ▷ And just when you think you're done, something or someone will disrupt what's happening. creating an opportunity to *iterate*—to do it all again (see Exhibit 19.2).

EXHIBIT 19.1. Patterns in Facilitated Groups
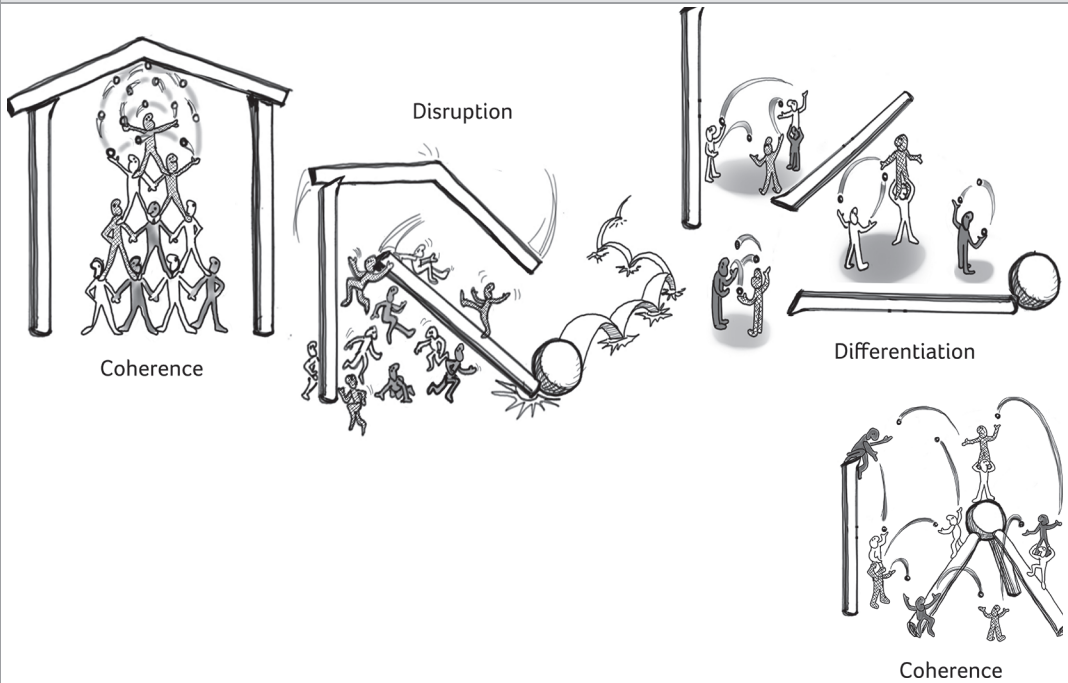
EXHIBIT 19.2. Actions for Dialogic Engagement
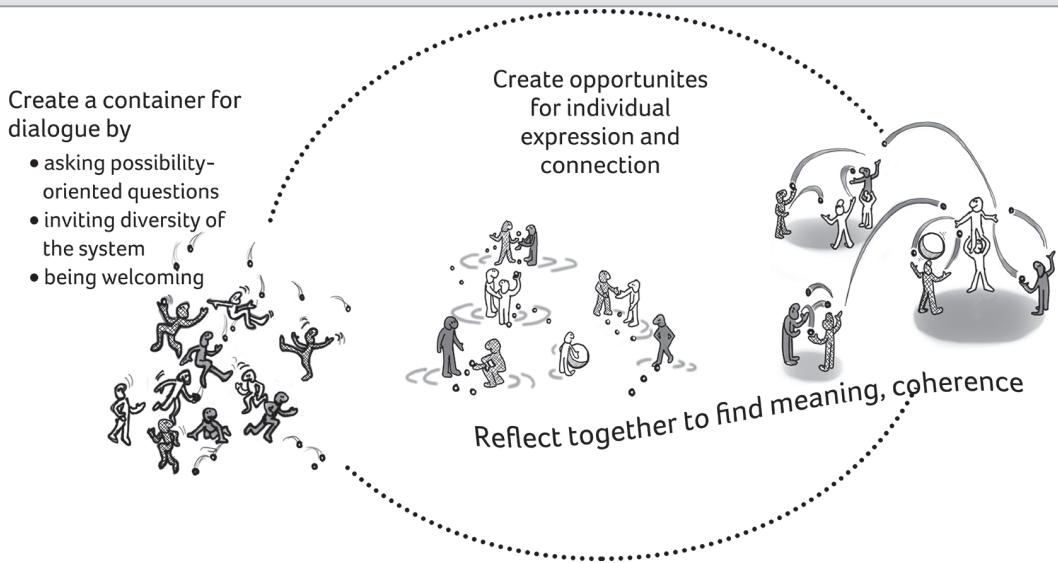
Yve reflects: An example of Peggy's description of **new coherence** emerging from disruption occurred in the design phase of the EE conference. The design team had already been working for a couple of months when Peggy and I met. So, at the next design team meeting, Peggy **introduced a disruption** into the planning that had been under way, in the form of a developmental evaluator (me) who was invited into the design process (**co-creation**). Prior to that disruption, the original coherence around the purpose of evaluation was that it would help measure the impact of JTM's dialogic practices on collective and individual understanding of engagement. With the disruptive idea that developmental evaluation would be something quite different and could be a powerful tool to foster a new understanding of the practice of journalism and community engagement, the purpose statement of the conference and the design itself were opened to renovation. Through the developmental evaluation processes of **defining the developmental purpose** and clarifying the specific **form that the innovation was taking**, the design team articulated the conference purpose as illuminating and supporting a new paradigm for community and journalism engagement. The next natural step was to confirm that the planned conference activities were congruent with that purpose. Thus the **co-creation** principle came into play. The developmental evaluation became part of the intervention when we aligned the conference activities and evaluation questions. By going through the conference design, we made sure that each activity was related to both the overall convening and development purposes and that there was a data source associated with each activity—a **new coherence**. Some of the specifics of conference activities, such as the end-of-the-day reflection questions, were left open to allow the design to respond (**co-creation**) to what was

emerging from ***disruption, randomness,*** and ***mystery.***

Designing EE

Often people fear emergent design because end goals are not articulated in advance. So how do you know where you're going? A distinction between aspirations and goals provides some guidance. Aspirations point in a direction without specifying details. It's an art to name an intention big and bold enough to hold a diversity of perspectives yet contained enough to not get lost. It's also an iterative process, holding the purpose lightly, knowing it will evolve as new players get involved and we learn more through working together.

Fear is also a common response to disruption. And disruption is a given in journalism. For years, journalism gatherings have been laden with "woe is me" commiseration. People told us that our JTM gatherings were different. That's because we met disruption by compassionately asking a bold, generative question. By being compassionate, we create a bubble in the dissonance to breathe and look around. Social science research tells us that we move toward what we can imagine (Cooperrider, 1990). An inviting question attracts those who care and implicitly says we'll figure it out together because no one has the answer.

The idea of dialogue has been entering into journalism for several years generally, as in the inclusion of the term *engagement* in the name of the EE conference. Yet few seemed to know the potential of engagement, using the term for activities like social media and business development. Given we had much to offer in this arena, it seemed time to host a gathering on journalism and community engagement. We reached out to the Agora Journalism Center at the University of Oregon, which, like JTM, focuses on the relationship between community and journalism.

Ask Generative, Bold Questions. The EE conference hosts included key players from the Agora Center and from JTM. We invited a diverse team of colleagues to form a design team, responsible for expressing conference aspirations, crafting an invitation, and inviting colleagues to attend. As the conference planning proceeded, an evaluation subteam of four plus Yve formed within the design team, aided by occasional advising calls with Michael Quinn Patton.

The team began with a preliminary conference design based on past JTM gatherings, tailored to the aspirations the hosts articulated for this gathering. Through the integration of developmental evaluation principles and practices into the conference design process, breakthroughs occurred in the convening question, the conference purpose, and the role of evaluation in investigating the question and supporting the purpose. Exhibit 19.3 shows this developmental journey from original aspirational statement for hosting to final, generative, and ambitious convening questions. Along this journey, the conference developmental purposes and the evaluation purposes became one and the same.

Yve reflects: Patton (2016b, p. 254) describes using the principles of developmental evaluation as *sensitizing concepts* that "remind us to engage with the concept throughout our fieldwork within a specific context." We used some of the developmental evaluation principles as sensitizing concepts to remind us what to include in both the design of the conference and its evaluation. The use of "**developmental purpose**" and "**innovation niche**" as sensitizing concepts focused the *iterative, collective reflection* that came so naturally to the design team. The result was a convening question aligned with the form of the innovation (open and generative) and a purpose statement that reflected the intent of the evaluation to midwife the emergence of an innovative engagement between journalists and communities that "contributes to thriving, inclusive communities." Thus, the conference purpose shifted from the original aspirational statement in column 1 of Exhibit 19.3 to the one in column 2. Because the whole conference was designed to deliberately create *random, unplanned encounters* to see what would emerge, and since

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EXHIBIT 19.3. Example of Adaptation and Development of Principles

Hosts' original aspirational statement: The conference focus is on:	*Final generative, ambitious convening question:* What is possible when the public and journalists engage to support communities to thrive?

• Civic impact when journalists and communities engage.
• Media as a force for good.
 	
Our intent is to catalyze a network.
 	
• Work with the ecosystem and its power of connecting the players, increasing collaboration.
	Developmental and evaluation purpose (they became one and the same):
	
	• Our intent is to *illuminate, inform, and support community information health* that contributes to *thriving, inclusive communities* by:
	  ○ learning about processes that grow it
	  ○ creating products that support it
	  ○ catalyzing a community of practice dedicated to it, and
	  ○ identifying actions to amplify it.
	• To begin to understand how engagement changes communities, the relationship between community members and journalists, and the field of journalism.

the group was experienced in using the feedback that comes from those kinds of "compassionate disruptions," there was an openness I have rarely experienced in other settings to the *iterative* refining of the **purpose of the conference in developmental** terms.

Our purpose also informed the evaluation.

Yve reflects: Before integrating developmental evaluation as the approach, the design team's language around evaluation included such phrases as "measuring participants' knowledge and perspectives on engagement before and after" and "identifying what people found valuable." By *embracing disruption* and **co-creating** the conference, evaluation, and the emerging innovation, the team's language around evaluation shifted away from terms such as *measuring, outcomes,* and *impact,* which imply a more developed model and a clearly defined set of expected outcomes. Early on, one of the hosting partners had suggested using their pre–post survey of impacts on conference participants' thinking as the centerpiece of the evaluation. The design team, focused on illuminating and supporting rather than measuring, prioritized a more ethnographic and qualitative approach, while the hosting partner carried out the pre–post survey in parallel. When the evaluation subteam was poring over the data that had naturally come out of the Open Space and the plenary sessions, we *welcomed what showed up* and incorporated the survey findings along with all the other naturally occurring data (such as Facebook posts, tweets, harvested sticky-note reflections). In so doing, we discovered additional support for listening as a key theme of engagement (the survey found that 20% of participants mentioned "listening" as part of the definition of engagement before the conference, and 30% did so at the end). The developmental evaluation

brought life to that data by identifying "Listening is our superpower" as one of three principles for engagement between journalists and community that emerged at EE. (To see the two other principles of engagement that emerged at the EE conference, see Exhibit 19.4 on p. 165. The three principles are listed in the curved line of text at the top.)

Additionally, our purpose gave us some sense of what we'd be listening for, while staying open to the unexpected. As we matched purpose with the products the conference would generate to aid our listening, we were astounded by the wealth of data that would be available to us: Open Space session notes, tweets and Facebook group posts, graphic recordings, photographs, audio and video recordings, Post-it notes used in clustering during group reflections. Yve kept a record so that we knew going in who was capturing what and how. It paid off down the road.

Yve reflects: Because of their experience using multiple dialogic practices to facilitate emergence, the design team easily embraced the developmental evaluation tenet to keep open to what is emerging and not prematurely force a meaning. There was an ease with knowing that the purpose of the endeavor was to illuminate and foster emergence of a new path (the **innovation niche principle**), that this was precisely the purpose of creating a setting where complex and unpredicted, *random encounters* would generate new order from chaos.

Engage the Diversity of the People and Perspectives in the System. If you want different results, then engage different people. Specifically, change the mix of people who are part of the system. It's another potential pain point, particularly with conflicted issues. After all, "those people," whoever the "other" is, can be disruptive. It can be messy. Typically, when a part of the system

feels ignored, misheard, suppressed, misunderstood, it acts out. Yet people who are not the "usual suspects" bring an essential part of the puzzle precisely because the status quo ignores them. Their participation also contributes to the unpredictability of the situation. When you create a generative inquiry big enough to hold all who care and designing sufficient spaciousness for welcoming who and what shows up, new conversations focused on unexplored possibilities arise.

It's rare for journalists and community members to engage in extended dialogue with each other. It was part of what made EE unique. Without their interactions, the importance of listening might never have arisen. Yet it became an essential principle as voiced by a participant during the conference close: "Listening is our superpower."

Welcome Who and What Shows Up. Once the invitations have gone out, particularly when the gathering is open to the public, you never know who will show up. Or what external events might influence what's happening. Part of the art of dealing with disruption is to stay open and curious. It's where a personal practice that keeps one centered in a storm pays off. It's also helpful to work with a team when the situation is complex. So even if one host is emotionally triggered by something said or done, another can be present to ensure the space remains open for engaging with what's happening.

Yve reflects: Once the design team realized that the developmental (and evaluation) purposes were to illuminate and support, and not to measure outcomes, I understood the reason why Open Space Technology as the meeting process for EE made sense. OST is a *process based on principles* that purposely allows something new and unpredictable to emerge, where predetermined outcomes can be counterproductive, setting expectations in rigid terms that can blind us to the unexpected

emerging. Thus, OST exemplifies how the engagement principles of embracing *mystery* and *chance encounters* help generate **emergent meaning of the innovation.**

Encourage Random Encounters. What makes random encounters creative rather than a disruption that gets in the way? Our natural tendency when disrupted is to shut down, defend, or attack. For creative responses, we need room to work through triggers. By setting the stage with a meaningful, generative question, an invitation big enough to attract a variety of perspectives, and a commitment to being welcoming, the likelihood for generative encounters is increased.

Here's an example. At EE, an Oregon public figure who had been vilified by the Portland press signed up for the conference. Because we kept a public registration list, her presence at the conference was known to anyone who looked. We heard from several journalists warning us that she could be disruptive. So our ears were open as the convening began. Because our design provided the spaciousness for multiple perspectives to be authentically explored, she brought valuable contributions to numerous sessions. And if she was disruptive, it was with her creative gifts.

EE accomplished the task of using disruption creatively by spending almost two days in Open Space, inviting people to host sessions on what mattered most to them. In the process, they connected with others, often across divides.

People who have never experienced the process often fear chaos since no one knows what sessions people will call. What if it isn't relevant? Or if it's counterproductive? Or controversial? Welcoming disturbance prepares us to embrace mystery with curiosity and a sense of possibility.

In more than 20 years of opening space, sometimes in highly conflicted situations, I have never seen it fail. It's a seeming paradox: when we are invited to pursue what authentically matters to us, rather than

selfishness, our actions become an act of service, contributing what we love on behalf of the whole. What in other circumstances might be disruptive differences become gifts to the whole.

Yve reflects: In looking back now at Peggy's and my first meeting, I clearly see that she was making good use of our ***random encounter*** by practicing the art of ***welcoming who shows up.*** She invited me to pursue what authentically matters to me (choosing the right evaluation approach for a given situation), which moved me to contribute what I love (using evaluation methods to support innovations that advance social change) on behalf of the whole (JTM's endeavor to reimagine journalism that serves the needs of communities and democracy). By doing so, she was able to create space for my authentic expression and drew out a connection to and commitment to the project that I didn't know I had. So, when she invited me to join the design process, with her characteristic openness to whatever might happen, I agreed to participate even though at that point there was not yet funding for evaluation. Our shared belief in the power of being open to what can happen when we trust the process gave me confidence it would be worth it.

At EE, the topics were rich and varied: *What does engagement mean? How do we really listen to communities? What is objectivity in journalism? Who determines what is newsworthy? Is there structural bias built into journalism that prevents rich engagement with communities of color?* These and other topics brought out authentic exchanges around deeply held beliefs. They led to both intimate and powerful exchanges on issues like journalism ethics when engaging communities and even discussions about the purpose and practice of journalism itself.

These sorts of exchanges are the norm at JTM gatherings. What was different this time was what the developmental evaluation caused us to do: be mindful about gathering data, particularly from collective sense-making activities held at the beginning and end of each day, so that we could discern broader patterns across the conference.

Yve reflects: Through this process, toward the end of the conference the design team ***welcomed and worked with a disturbance*** that led to sharpened understanding of what was emerging. A ***disruptive idea*** was that journalism is not simply reporting, but that it is about change and making a difference for communities. Engaging with this idea then led to the even more disruptive idea that there may be a new role that is not journalism or the journalist, but the purpose of which is to support communities to tell their own stories. This disruption opened us to a breakthrough so that, as one participant said, "where we ended up at the conference was a completely different place, with community at the center rather than journalism at the center." Another observed, "If the focus is on the journalist, then it's often constrained by journalism training and the traditional role of journalism, where you're listening in order to write your story. You'll hear what fits your story, your frame, and you're not going to hear what the community has to say, which leads us to question who decides what's newsworthy. This is quite profound." In further reflection, the team began to see how that insight helps make sense of the "mistrust, lack of mutuality, suspicion of hidden agendas, separation, manipulation, and inauthentic voice" of the old paradigm. With that insight, a new framework of engagement began to take off (the **developmental purpose**). Through the practices of ***embracing mystery*** and allowing meaning to emerge from ***random encounters,*** the idea began to emerge that in a community engagement context, journalists' ideas and motivations should be removed from center stage. The journalists in the

room were organically shifting their roles from having an idea of the story that they wanted to tell to being present and following leads, allowing the story to emerge—and then following the group's lead to tell its story, which became the story of the emerging role of the journalist.

Reflect Together to Discover Meaning and Emerging Coherence. We knew that we would gather a lot of data. And so we knew that the more we involved participants in making sense of their experience, the better off we'd be. We always design plenary sessions for reflection. They support us to step out of the flow of the intense conversations and look inward to ask what meaning is emerging for us.

By using our innate human capacity for pattern sensing, each time we gathered as a whole group, we did a different activity to surface the gems people had found. This was more than an intellectual activity. We invited them to draw from their whole self, to think critically, of course, but also to listen to their hearts, notice what touched their spirit, and what moved them to act. And then we'd involve them in discovering patterns across their individual yearnings so that collective insights, simply expressed, became visible.

Such activities are one of my favorite aspects of convening groups around complex issues. When people speak their authentic truths and find kindred spirits, something vital shifts in them. Many no longer feel so alone. They now know in their bones that others share deeper truths and aspirations that they may never have even consciously named before. And sometimes people with very different worldviews become unlikely partners to bring what matters to them to life. Often, an eloquent, deceptively simple generative image captures the essence of an emerging idea. We saw that in the closing reflections and tweets, which ultimately incorporated three widely expressed ideas into the journalism/engagement framework that emerged.

This collective sense making may be the greatest leap of faith for those who have not experienced the magic of emergence: that something useful can arise out of many seemingly disconnected interactions. Twenty-plus years of being present with groups meeting from a few hours to multiple days has left me with the unshakable confidence that when conditions are designed for creative engagement, something of value to the people attending always emerges. It may not be what they expected. In fact, it often isn't. [*Yve adds:* which is why an approach to evaluation that is not constrained by preconceived outcomes is so fitting.] But it can and does change lives and relationships. And it can inspire actions that have been frustratingly blocked for years.

Yve reflects: By generating data collected naturally through Open Space sessions and the harvesting and sorting of reflections, which integrate *meaning-making* directly into the conference activities, JTM has for years been exemplifying the developmental evaluation principles of **co-creation** and **timely feedback.** Opportunities for meaning making were certainly built into EE. Periodic activities allowed all attendees to reflect on a question, which the design team then incorporated into on-the-fly design change (**timely feedback principle**). At the end of each day, the team would do a quick review and summary of what had come out of the conference so far, what new ideas were emerging, and would then decide what the morning's generative reflection would be to draw out the fledgling new ideas and spur new suggestions for the next round of Open Space sessions. The *random encounters* of Open Space, the *shifting between opportunities for individual expression and connection* and reflective and generative focuses, led to disturbances that in turn led to real results for the **developmental goal** to illuminate the meaning of engagement.

At EE, the closing circle was predominated by gratitude. Many spoke movingly of falling back in love with journalism—practiced in the way they imagined it to be at the conference. Some students spoke of letting go of doubts about their chosen field, inspired anew by its potential to make a difference.

Because of the developmental evaluation, we were more mindful about capturing the insights garnered from these and other reflections. Our hope was that doing so would address one of the challenges that led to trying developmental evaluation: broadening our reach. Over the years, many people have told us how impactful their experience was. They changed their work, entered into partnerships, reframed the way they saw themselves or what they do, or were otherwise deeply affected by their experience. It's darn near impossible to share the impact of that, much less broaden its reach. We hoped the developmental evaluation might help us to do that.

Yve reflects: The use of **developmental purpose** as a sensitizing concept informed not only the design of the conference and the focus of the evaluation. That "illumination and support" were the stated developmental purposes was critical for driving the creation of a report that could be used by EE participants, funders, and others to envision new experiments and to make sense of what they were seeing in the changing media landscape. In past conferences, where *iterative* and *collective meaning making* took place, not having a purpose stated in **developmental** terms may have meant that, while the proceedings were collected and made available, there was, as a JTM board member expressed it, still sometimes a lingering frustration "that we didn't come away with a lasting document of record." The developmental goal to illuminate the new paradigm resulted in a tangible, groundbreaking, and actionable outcome (the framework, which is depicted below).

Ripples Beyond

Having gathered a great deal of data, including that derived from collective sense making across the days, we invited anyone who wished to do so to join us in diving into the material following the event. A team of five of us read through it all. Two of us drafted a report based on what we discovered. It wasn't easy! And it took the varied perspectives among us to tease out some elusive ideas.

Yve reflects: After the conference, as the developmental evaluation team worked with the proceedings, the copious data initially generated a feeling of overwhelm. "I have to admit that the moment of looking at the large data set and trying to turn it into a thesis was super overwhelming. That reduced my engagement," said one team member. The developmental evaluation principle of **utilization focus** helped the group realize that neither a "dissertation-level" analysis nor a traditional evaluation report was needed. In considering who would be using the product of the evaluation and what they would be using it for, the team identified JTM (to continue to develop the framework), community and journalist practitioners of engagement (who might want a set of guiding principles), funders and media organizations (who are looking for promising new directions for projects), and community-based organizations (that want to better understand how to work with journalists). None of these users needed a dissertation, or even a full conference or evaluation report. The reminder to focus on utility echoes the engagement principles of using *meaning making* as a doorway to *simplifying.*

Another breakthrough came when we made it visual (see Exhibit 19.4.)

We shared our synthesis of their words and ideas with the rest of the participants for comment and then made it widely available. It's a framework that provides a glimpse into how journalism and community are evolving together. It now guides our work and is being used by others. As a first step in putting language around what the collective wisdom of journalists, community members, educators, students, and others are sensing in the changing journalism ecosystem, it seems to resonate when we share it.

This framework has become JTM's calling card for describing our work. We produced a framework report that summarizes the emerging ideas about engagement that are reflected in the graphic. The full report can be found at the EE website (Journalism That Matters, 2016). We are also using it as part of a new developmental evaluation supporting a project by one of the conference attendees. It's influencing the way they think about their pioneering journey and causing them to dig deeper in learning how these principles apply to their real-world work. And it's raising the bar on the quality of their engagement.

Yve reflects: Indeed, it appears that results are already being seen. By taking a **utilization focus**, the team determined that

EXHIBIT 19.4. Evolving a Civic Communications Ecosystem

Nothing about us without us • Listening is our superpower • Speak truth to empower

COMMUNITIES
Strengthen capacity for stewarding community well-being

• Develop storytellers
• Involve youth
• Colllaborate with artists

ENGAGEMENT
Connect communities and journalism

Just do it

JOURNALISM
Strengthen engagement capacity

Create structures for doing engaged journalism

Support the community of practice by increasing the size and intersection

Empower journalism education

NURTURE A THIRD WAY
A Communications Ecosystem for a Thriving Civic Sphere of Engagement

among the key users of the framework report are funders and institutions that study and support journalism. A funder who attended the conference indicated it has impacted his thinking and work with local journalism. A potential project with a community developer became more likely because of our ability to express our philosophy. The developer has told us that what we are doing is what is missing in their community engagement process, and the head of the Agora Center used the framework to "think about where Agora fit in the model." By adding a **utilization focus** to emergence, we got results in the form of impact on institutions.

Following the developmental evaluation tenet that evaluation is part of the process of **supporting an innovation and then learning more about it through its adaptation to new contexts,** the design team identified two next steps that are currently in process. We are interacting with a handful of projects that were informed by EE by (1) supporting the projects' use of the framework as a guiding strategy and (2) by deepening our understanding of engagement by asking "What are we learning about the principles articulated in the framework from what is happening in the projects? What outcomes are we starting to see related to these ideas?" Essentially, the plan is to engage with the framework with a *pioneering* mindset—to jump in, try out the new ideas, and then through *collective reflection* work with the feedback that comes.

Ongoing Development

The framework that emerged from EE, complete with its generative visual, continues to be shared with journalists, community activists, funders, students, academics, and others. JTM is now using the framework in the next phase of learning about "what is possible when the public and journalists engage to support communities to thrive." Using developmental evaluation, we are working with several engagement projects around the country to support their use of the framework's emergent principles. Peggy, Yve, and other JTM members meet regularly to reflect on what we are learning about the framework and to deepen our understanding of what the principles mean and how they make a difference in these projects. And we stay open to what emerges as our journey continues.

Practice Exercise

As noted in the introduction to this chapter, the placement of this case example at this point was to portray, highlight, and illuminate the *D* (developmental) criterion in the GUIDE framework. Select at least one of the engagement principles presented by Peggy Holman and comment on the extent to which it meets the other four GUIDE criteria. Likewise, select at least one developmental evaluation principle portrayed by Yve Susskind and comment on the extent to which it meets the other four GUIDE criteria.