Meaningful M&E Systems

Valuable approaches for evidence based leadership and high performing teams

Veronica Smith + Antonella Guidoccio
European Evaluation Society Conference 2018

data2insight
Find wisdom in information

+

EVAL YOUTH

HOW TO

~~Track progress effectively~~

HOW TO

Achieve high performing teams!

Objective's of today

Re-think the function of M&E Systems

Get a broader views from an organizational perspective

Learn new tools to link M&E with high-performing teams

Veronica Smith

(Architect + Engineer + Evaluator + Informatics) x (Communicator + Process facilitator) = Data scientist for social good

Antonella Guidoccio

(Planning + Evaluation specialist) + (Agile + Design thinker) + Tech advocate + EvalYouth leader = Innovative evaluation scientist forever young

Today's agenda

Step 1: **Why a different approach to M&E?**

Step 2: **Meaningful M&E System**

Step 3: **TEAL organizations – F. Laloux**

Step 4: **Evidence based leaders – S. Barr**

Step 5: **Assessment – ROLE Survey**

Step 6: **How can you use this in your practice?**

"The most exciting breakthroughs of the twenty-first century will not occur because of technology, but because of an expanding concept of what it means to be human"
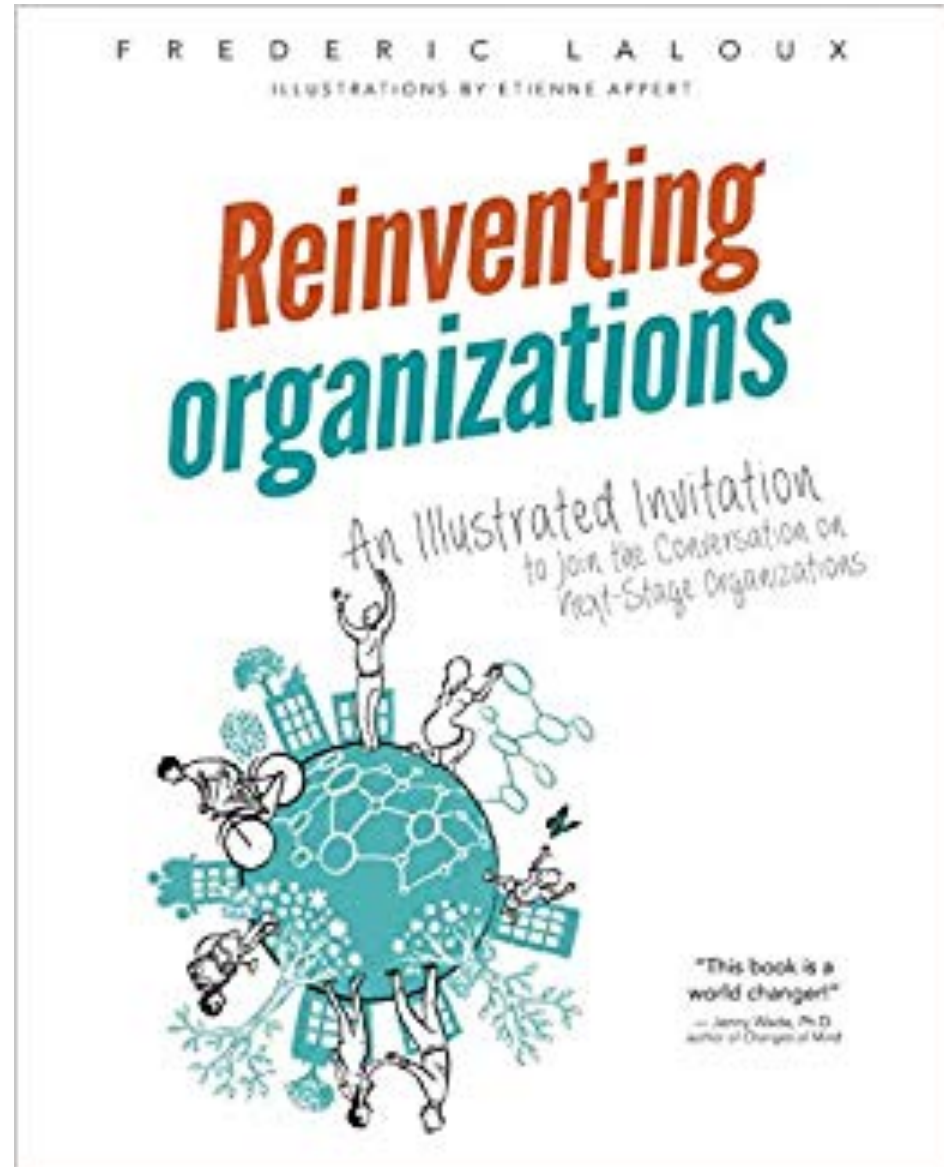
-John Naisbitt

Traditional M&E

Traditional M&E

TEAL ORGANIZATIONS

Frederic Laloux

FREDERIC LALOUX
ILLUSTRATIONS BY ETIENNE APPERT

Reinventing organizations

An Illustrated Invitation to Join the Conversation on Next-Stage Organizations

"This book is a world changer!"
— Jenny Wade, Ph.D.
author of Changes of Mind

TEAL ORGANIZATIONS – F. LALOUX

1) Management's objectives

2) Top-down performance tracking system

3) Hierarchical pyramid

4) Assigned positions and descriptions

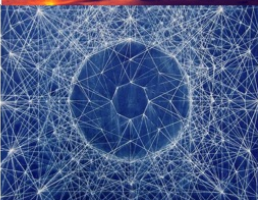**Vs.**

1) Organization own purpose

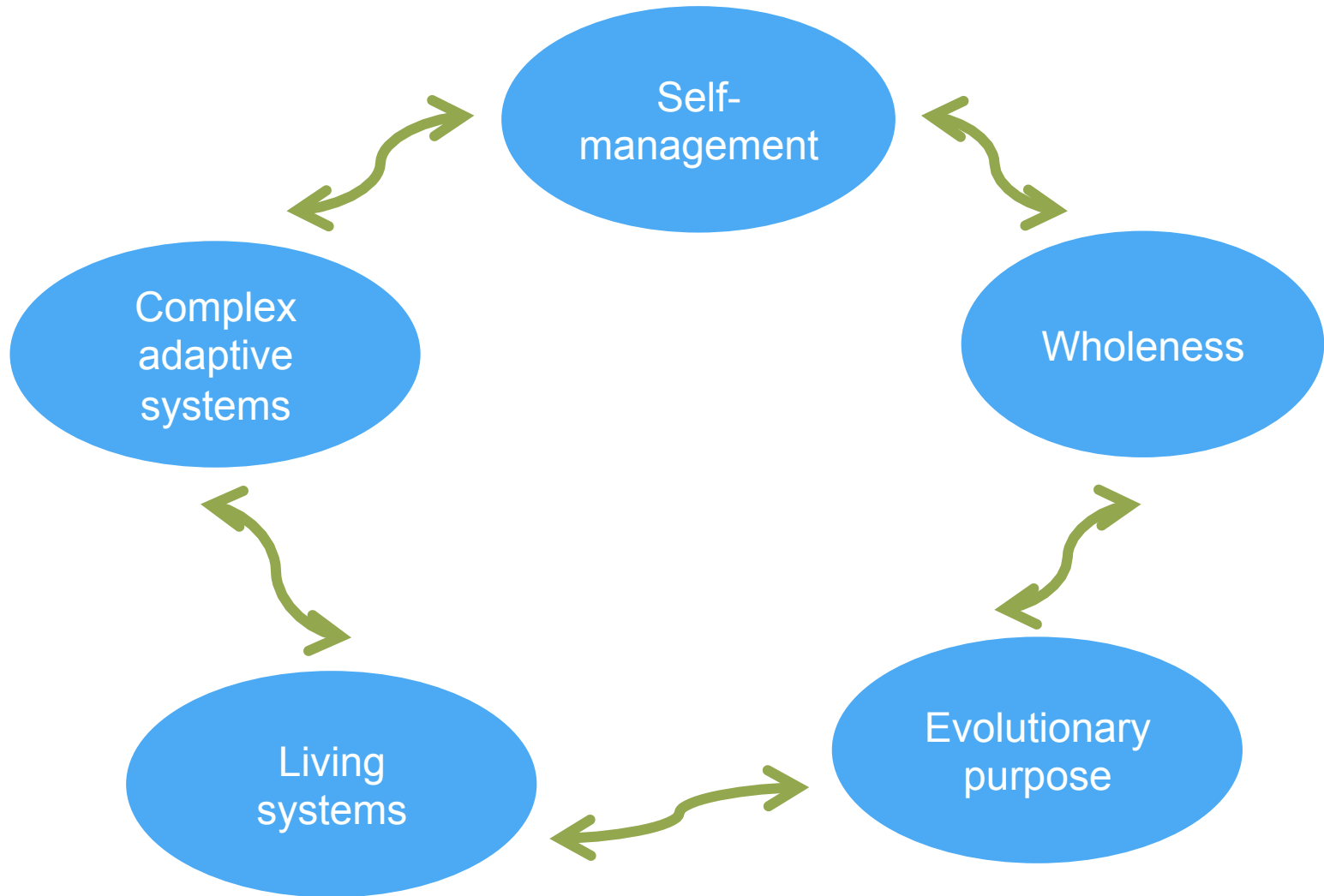**2) Self-organization and self-management**

3) Decentralized small teams

4) Multiplicity of roles, often self-selected and fluid

Rapid change & adaptation

	Explanation	Current Examples	Key breakthroughs	Guiding metaphor
RED Organizations	Constant exercise of power by chief to keep troops in line. Fear is the glue of the organization. Highly reactive, short term focus. Thrives in chaotic environment	•(some) Startups •Mafia •Street Gangs •Terror Organizations	•Division of Labour •Command authority	
AMBER organizations	Highly formal roles within a hierarchical pyramid. Top down command and control (what and how). Stability valued above all through rigorous processes. Future is repetition of the past.	•Catholic Church •Military •Governmental Organizations •Public School System	•Formal roles (stable and scalable hierarchy) •Processes (long term perspectives)	
ORANGE organizations	Goal is to beat the competition; achieve profit and growth. Innovation is the key to staying ahead. Management by objectives (command and control on what; freedom on the how)	•Multinational companies •Charter Schools	•Innovation •Accountability •Meritocracy	
GREEN organizations	Within the class pyramid structure, focus on culture and empowerment to achieve extraordinary employee motivation	•Culture Driven Organizations (NGO's, Southwest Airlines, Ben & Jerrys, Semco)	•Empowerment •Values-driven culture •Stakeholder model	
TEAL organizations	No one is the boss of anyone else. Hierarchy is not powerful enough to face complexity, e.g. global economy, human muscle brain (cells). If you take your purpose seriously there is no competitor by definition	•Network Organizations (Burtzoorg, ESBZ, Zappos, Semco, A.W. Gore, Automattic)	•Self Management •Wholeness •evolutionary Purpose	

TEAL ORGANIZATIONS

Examples of TEAL Org. practices

- **Wiki – Patagonia …**
- **Innovation Gov Lab**

Results, not actions.
No weasel words.
Be ruthless

Experiments, not assumptions.
No failure, only feedback.
Iterate, don't procrastinate.

Cascade, don't fragment.
Buy-in, not sign-off.
Working on, not just in.

DIRECTION

LEARNING

DECISION

IMPACT

EXECUTION

EVIDENCE

ACTION

Leverage, not force.
Patterns, not points.
Processes, not people.

Learning, not judging.
Evidence before measures.
Measure what matters.

Causes, not symptoms.
Practical, not perfect.
Collaboration, not competition.

Assessments and tools to become high performing teams

Assessment tool
ROLE SURVEY

Readiness for Organizational Learning and Evaluation

- **Direction**
- **Culture**
- **Leadership**
- **Systems and Structures**
- **Communication of information**
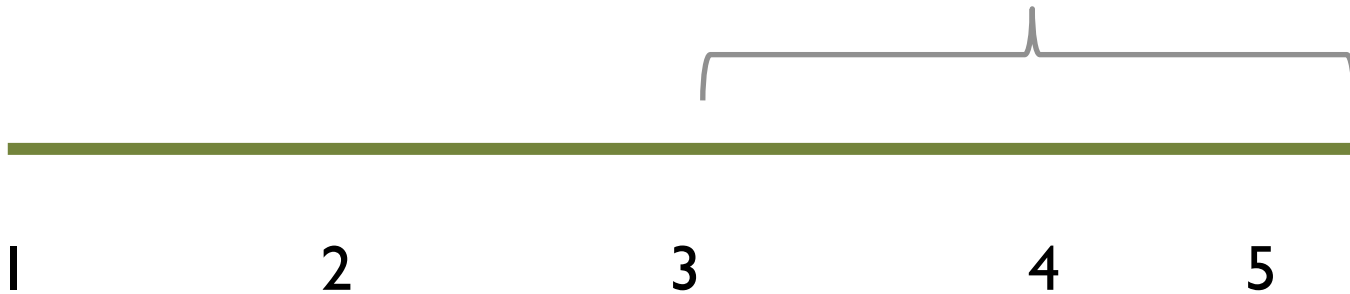- **Teams**
- **Evaluation**
- **Additional information**

Exercise 1
ROLE Survey

- **Complete the Culture survey questions**

- **Reflect on your scores**

Interpreting ROLE results

Team may be ready for learning

| 1 | 2 | 3 | 4 | 5 |

EES 2018 CONFERENCE

Data2insight founder Veronica Smith and strategic partner Antonella Guidoccio are presenting at the 2018 **European Evaluation Society conference** in Thessaloniki, Greece from Oct 1-5, 2018. We provide here information and resources to download from their round table sessions.

Focusing sessions: a stakeholder engagement and evaluation design method

When working with diverse communities, allowing time for stakeholder engagement is foundational to knowledge co-creation. A focusing session is a best practice that comes form theory-driven evaluation that contributes to better informed evaluation questions, which leads to more robust evaluation design, and findings that stakeholders value

Meaningful M&E systems through evidence-based leadership and evolutionary purpose

In this age of increasing complexity, rapid change, and demand for greater transparency and accountability from leaders the most successful teams of the future will excel at practical performance

Let's discuss some examples!

- Community based organization in the US
Used ROLE to inform planning decisions

- Central Bank in Argentina
~~Event~~
Innovation hook → Mantra 1st

It is worthwhile to integrate evaluation activities into our organization's program delivery and reporting practices.

97%

Mistakes made by employees are viewed as opportunities for learning.

100%

Currently available information tells us what we need to know about the effectiveness of our programs and processes.

19%

Best practices for high quality evidence based decisions

1) **Role definition and allocation - "Roles instead of jobs"**

2) **Feedback and performance management**

3) **Creating a safe space**

4) **Information flow**

5) **Team and community building**

6) **Mood management**

Resources

✓ Teal Org - Knowledge wiki - Frederic Laloux
http://www.reinventingorganizationswiki.com/Main_Page

✓ ROLE Survey

https://data2insight/EES

✓ Performance Measure Resources - Stacey Barr
https://www.staceybarr.com/

How are you going to apply what we talked about?

Questions?

Today's goals

✓ Learn about evidence based leaders & high performing teams

✓ Add tools/resources to your evaluator toolbox

Thank you!

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https://data2insight.com/ees/

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