

Stories for Change: A systematic approach to participatory monitoring

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Summary

In recent years, storytelling has emerged as an important component of organisational learning, and a useful tool for evaluation. This paper draws on the experience of implementing a novel form of participatory monitoring, named the 'Most Significant Change' (MSC) approach across a statewide dairy extension project in Victoria. This process was adapted from the Davies (1996) 'evolutionary approach to organisational learning'. It is argued that the MSC approach can constitute an appropriate and credible process for monitoring change, and can promote organisational learning.

Introduction

In this paper I discuss the use of stories in program evaluation practice, then outline one approach to participatory monitoring and evaluation (the Most Significant Change approach), that is based on the collection and participatory interpretation of stories of significant change. Drawing on the experience of implementing this approach, I argue that stories are an ideal medium for practitioners to make sense of the array of program impacts and to make sense of the range of stakeholder values. Lastly, I highlight the potential value of using elements of the MSC approach to turn the mirror on ourselves by sharing stories of our own action research practice and interpreting these stories in a systematic way to help us to reflect and improve our practice.

The use of stories in program evaluation

Stories are used widely for co-operative inquiry and for discourse analysis, feminist research and cultural studies. In organisational learning literature, stories are valued and studied as the preferred sense-making currency. However, there appears to be little systematic, formal use of stories in program evaluation. Nevertheless, program evaluation frequently involves the collection and interpretation of stakeholder stories to make some decision or other regarding a program. These 'stories' emerge during interviews (often embedded in transcripts) and in written documents such as diaries or open-ended responses to questions. But paradoxically, there is a dearth of literature that *specifically* cites the use of stories for evaluating programs.

A possibility is that the under-use of the term 'story' in program evaluation relates to the dubious value in terms of revealing the 'truth' that storytelling poses. As children we are asked by adults whether we are 'telling stories' – there is an implicit notion in the term

‘telling stories’ that links it to telling ‘fibs’. In addition to truth, accuracy can also be called into question; storytelling can conjure up the vision of the game of ‘Chinese whispers’: where a story moves around a group of people, constantly changing and being reinterpreted as it passes from mouth to mouth. Understandably, evaluators may question the value of collecting stories told in casual conversation for eliciting factual content, and accurate description of events.

However, stories told in casual conversation can harness another sort of information; they provide insight into how storytellers construct reality, and to what they attach importance. In the organisational learning literature, stories told in casual conversation are recorded and studied by researchers to understand organisational culture (Boje 1991). However, they are not usually used to drive change, or to evaluate the effectiveness of an intervention.

I propose that when the collection of stories is coupled with a process of systematically and collectively interpreting these stories, (including documentation of these interpretations) then storytelling can be effectively harnessed for participatory evaluation. The interpretations themselves tell another story, and the process of collective interpretation can have several beneficial outcomes for evaluation utilisation. Through adding the extra step of collectively sharing and interpreting stories of program impact, a whole new dimension to the use of stories in program evaluation is added.

The MSC approach to monitoring & evaluation

The Most significant change (MSC) or ‘evolutionary’ approach to monitoring and evaluation, is one approach that incorporates the collection and systematic participatory interpretation of stories. It was developed by Rick Davies in Bangladesh in 1994 (Davies, 1996), but as far as I know, had never been formally used in Australia. Davies developed the MSC approach as part of his doctoral research that examined the use of evolutionary theory to aid organisational learning. His fieldwork was with a micro-credit project of the Christian Commission for Development in Bangladesh. In 1998, I implemented a modified version of the MSC approach) with the Target 10 dairy extension project which operates throughout Victoria (Dart, 1999).

In the MSC approach, program stakeholders interpret their experiences with the program and select instances of significant change and record each as a story. They are also required to record why this change is significant to them. For example, when a farmer tells a story of significant change, she/he interact with the world and draw meaning from it, and it is in the telling of the story that meaning is constructed. Then when the reviewers read and evaluate the story, they engage with it and construct a further new meaning. When this is done in a group, this construction may be shared. In the MSC approach the criteria that are used to interpret the story are documented, made transparent and attached to the story itself. It is this transparency that makes the whole process even more open to new and more sophisticated constructions of meaning.

The MSC approach, which is a continual monitoring process, has been running across the Target 10 dairy extension project, since June 1998. The trial has revealed how storytelling can help practitioners make sense of impact. I will elaborate this finding after firstly describing the project and method behind the MSC approach.

Background to the project

The Target 10 Dairy Extension Project was initiated in 1992, with the aim of enhancing the viability of the dairy industry through programs that profitably increase consumption of pasture by cows. It operates across four regions of the State of Victoria in Australia. In 1996 the project focus was broadened to include other areas that were of high priority to the industry. Information about these areas (grazing management, business, dairy cow nutrition, soils and fertilisers and natural resource management) is extended to farmers through courses, discussion groups, newsletters, comparative analysis, field days, focus farms and demonstrations and other media.

The organisational structure under which the project operates is complex, having both public and private stakeholders and partnerships with the University of Melbourne and the dairy industry. The project also has a number of steering committees at the regional and state level. These committees are all chaired by farmers, and are comprised of farmer representatives, extension staff, university staff and representatives from the local dairy industry. Taking this organisational complexity into account, it is vitally important that time is allocated for the various stakeholders to enter into a meaningful dialogue about what is happening in the field, and whether these experiences represent the sort of outcomes that are desirable. It is also important that projects under this organisational structure are able to demonstrate that they have the capacity for reflective practice, organisational learning and the ability to capture and interpret evidence of changes that they are trying to achieve.

Since 1992 the Target 10 dairy extension project has completed extensive benefit-cost analysis and individual programs have been evaluated against their objectives. However, in 1998 there was still a feeling that some of the project impact and outcomes were not being captured. It was agreed to trial some unconventional forms of monitoring and evaluation, and one of these ‘experiments’ was to implement a ‘story-based’ approach to monitoring and evaluation. After introducing the story concept to key project stakeholders, an agreement was made that the approach would be implemented across the whole project for a period of one year.

Method of the MSC approach

There are three main parts to the approach (as practised in the Target 10 dairy extension project):

- establish domains of change
- set in place a process to collect and review stories of change
- conduct a secondary analysis of the stories.

Stage One: Establishing domains of change

In the first stage of the process, the evaluation audience identifies the ‘domains’ of change that they think need to be monitored at the project level; for example, changes in practice. This process is a discrete activity and need only occur once. The Target 10 project nominated four domains using the Delphi technique. Delphi is a form of interactive (postal) surveying that utilises an iterative questionnaire and feedback and provides participants with an opportunity to revise earlier views based on the response of other participants, until some desired level of consensus is reached. Unlike ‘performance indicators’, these nominated

'domains' of change are not precisely defined but are left deliberately fuzzy; and it is initially up to field staff to interpret what they feel is a change belonging to any one of these categories.

Stage Two: Collecting and reviewing the stories of change

The next stage involves the collection and review of stories of significant change (according to the defined 'domains' of change that had been nominated using the Delphi process). The stories are collected by those most directly involved in the project delivery (i.e., the beneficiaries themselves and the deliverers). People at each level of the project hierarchy are then involved in reviewing a series of stories and selecting those that they think represent the most significant accounts of change (see Figure 1 and 2). The selection of the stories takes the form of an iterative voting process, where several rounds of voting occur until consensus is achieved. At the various review fora, participants are required to document which stories they selected and what criteria they used. This information is then fed back to the storytellers and the project stakeholders. It is intended that the monitoring system should take the form of a slow but extensive dialogue up and down the project hierarchy each month.

Annually, all the stories that have been selected over the year are circulated amongst the project stakeholders. The stories are accompanied by the criteria that the review fora used in selection. Finally, at a round table meeting, 'investors' are asked to review the selected stories. They select the stories that they consider to be the most significant accounts of change.

Stage Three: Secondary analysis of the stories

In addition to the production of a document containing selected stories and readers' interpretations, the story process itself is monitored and additional analysis is carried out.

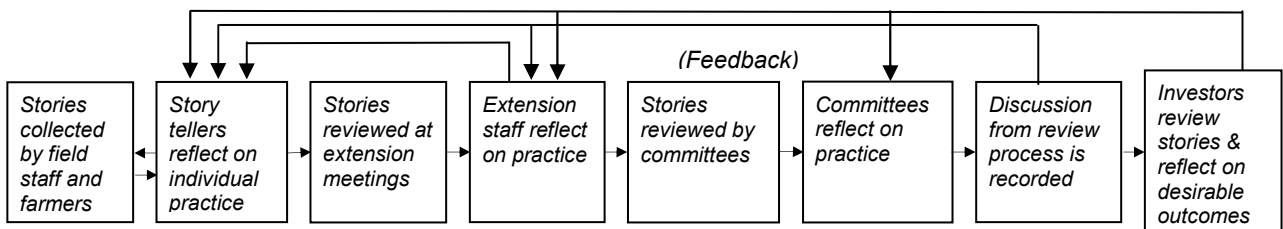


Figure 1 Steps and feedback loops of the MSC approach as implemented across Target 10 Project

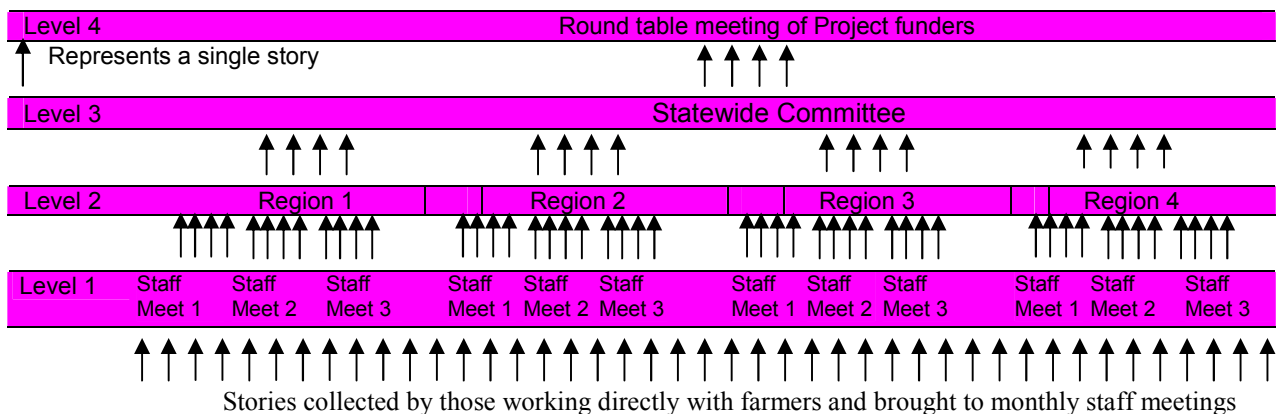


Figure 2 Diagram to represent an idealised flow of stories for a 3-month period across the Target 10 project.

The Value of Sharing Stories in Making Sense of Project outcomes

Describing the ‘results’ of MSC approach is a difficult task. The first problem is that there is never a ‘final’ outcome, as the aims of the process are to:

- Move *towards* a better understanding between all the various project stakeholders as to what is occurring for the individual farmer clients.
- To explore and share the various values and preferences of the project stakeholders.
- To gain a clearer understanding (as a group) of what *is* and *is not* being achieved by the project and to clarify what they are *really* trying to achieve, so that the project can move *towards* what is desirable and move *away* from what is undesirable.

Secondly, unlike conventional evaluation approaches that tend to reduce the complexity of the client experience into numbers and averages, the MSC approach attempts to keep an element of the ‘rich picture’. Therefore, it would go against the ethos of the approach to dissect the stories and summarise them in the name of the ‘final results’. The ‘final results’ of this process are really the feelings and the judgements that are made when reading the stories and deciding whether they represent the sorts of outcomes that the reader finds merit-worthy for a project such as this.

Impact of the MSC Approach on the Case Project

After the 12-month trial of the process, I conducted a meta-evaluation (evaluation of an evaluation) into the impact of the MSC approach on the project (as part of my PhD research). The data consisted of a facilitated discussion with the project funders, 10 semi-structured interviews with committee members and staff, and an internet survey sent to all project staff (Dart, 1999). The findings of this meta-evaluation revealed that those who participated in the process viewed the 'experiment' as a positive learning experience. Staff who participated in the process felt that they gained a better understanding of impact and a more fully shared vision between all the project collaborators. There is also evidence that the stories were used to improve extension practice, either to improve planning of extension activities or actually using stories to help explain a point to a farmer or to another member of staff.

An unexpected outcome of the process was that for some, the process boosted their morale, especially through hearing how their work had contributed to positive outcomes in farmers' lives. One respondent commented that the stories *'motivated, encouraged and invigorated us. Negative feedback was also very useful. It was really good to get positive feedback directly from farmers. Really great and rewarding to have "my name" mentioned in a story'*.

The process of collecting and analysing stories saw farmers, collaborators and extension staff sitting together at committee meetings discussing and interpreting qualitative data, making evaluative judgements and negotiating about what constitutes a significant change. Feedback from the project committees suggested that learning also occurred in terms of increased skill in conceptualising and capturing impact; over the year the storytellers became better at capturing impact and responding to the suggestions that were provided in the feedback from the story review process.

The MSC approach appeared to provide useful, engaging accounts of how farmers had been affected by the project interventions. But without underrating the power of the MSC approach to produce data that contributed to describing the impact of Target 10 project, I suggest that

the most significant impact lies in the intangible area of organisational learning. There have been noticeable improvements in terms of gaining a richer and more shared understanding of what has been achieved as a project and what is valued as a positive outcome by the project stakeholders. The fact that practitioners are actually using the findings of an evaluation to improve their extension practice is also encouraging.

The project has elected to continue using the MSC approach since the 12-month 'experiment' ended, and the project funders unanimously voted to continue to be involved in the annual story review process. Currently, other extension projects in Australia are now adopting modified versions of this approach.

Turning the Mirror on Ourselves

While explaining the MSC approach to students, I tend to demonstrate the process of collectively interpreting stories by asking the students to bring their own stories; for example stories about the most significant change in relation to their experiences with knowledge gain since being involved in higher education. I then ask them to review the stories and to try to select one story that they consider to be the most significant account of change. I do not give them any criteria to make this selection, but ask them to make explicit any criteria that they use to judge the stories. This session is very powerful, and seems to allow interpretation of the stories based on the collective group values, and explication of these values. I should add that, frequently, consensus cannot be reached, but the process of *trying to achieve* consensus about which was the most significant story, brings to the surface the groups' values and experiences with regard to learning.

In much the same way, I suggest that the process of selecting the most significant story of change brought about by an Action Research process can also help us to make sense of what we value in our own Action Research practice. Sharing stories of practice can be a very evocative tool, which can be added to and amplified by using this process to help the group to engage with the stories more profoundly through the 'game' of comparison and voting for one story against another.

Clearly there are many ways in which the MSC approach cannot be used in its entirety outside of a program/project structure. In Action Research practice there are often no boundaries of program activity, no formal hierarchical structure, and perhaps even less of a unified vision as to what we are attempting to achieve in our practice than would be found within most program teams. However, I hope that some of the principles from the MSC approach can be usefully harnessed in a workshop situation to help practitioners make sense of their action research practice in a structured, facilitated and evocative manner.

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