

Developmental Evaluation Plan

Grant #78784: Learning from collective well-being initiatives across the world to advance sustainable health, social, and racial equity in the United States

Background

Coined by Dr. Michael Quinn Patton, Development Evaluation¹ (DE) is an iterative and on-going approach to data collection and sense-making.² DE is particularly useful to address complexity and to support innovation when the path to success is untested or unknown. Grounded in systems thinking, DE uses “evaluative thinking and feedback,”³ throughout the design and implementation process.

While often considered a tool for learning once a project is complete, evaluation offers significant value when started during the *exploration/scoping phase*:

In this phase, understanding is ongoing and emergent; and there is a need to interpret both direction and results. If ideas are not allowed to fully “gestate” in the exploration phase, it is difficult for something truly innovative to be born.⁴

Process Indicators

Before target outcomes are identified or measurement systems defined, DE can inform an early set of process indicators that systematically track key aspects of an initiative’s design and implementation.⁵ Using the following set of process indicators, our team will document key questions, conditions,

¹References

Patton, M. Q. (2010). *Developmental Evaluation: Applying Complexity Concepts to Enhance Innovation and Use*. The Guilford Press.

² Parkhurst, M., Preskill, H., Lynn, J., & Moore, M. (2016, April 13). *The Case for Developmental Evaluation*. Reimagining Social Change. Retrieved October 9, 2021, from <https://www.fsg.org/blog/case-developmental-evaluation>.

³ U.S. Agency for International Development. (2019). *Implementing Developmental Evaluation: A Practical Guide for Evaluators and Administrators*. https://www.usaid.gov/sites/default/files/documents/15396/ImplementingDE_Admin_20.pdf.

⁴ Gamble, J. A. A. (2008). *A Developmental Evaluation Primer*. The J.W. McConnell Family Foundation. Retrieved August 9, 2021, from <https://mcconnellfoundation.ca/wp-content/uploads/2017/07/A-Developmental-Evaluation-Primer-EN.pdf>.

⁵ Parkhurst, M., & Preskill, H. (2014). *Learning in Action: Evaluating Collective Impact (SSIR)*. Stanford Social Innovation Review. Retrieved July 9, 2021, from https://ssir.org/articles/entry/evaluating_collective_impact#.

assumptions, and decisions that will guide continuous improvement, programmatic recommendations, and next steps:

1. Process observations

- What evidence would indicate that the process is working? Or not working?
- How have different values, perspectives, and relationships influenced the process and findings?
- What information or assumptions have informed key decisions?

2. Points of tension/emerging issues

- What are real-time activities to address tension/conflict?

3. Points of victory/emerging successes

- What are real-time activities to celebrate successes?

4. Internal collective wellbeing

- What are real-time activities to support our collective wellbeing?

5. Emerging themes and pattern

- What learnings are emerging during the exploration phase? How do we know? According to whom?
- What do initial results reveal about our expected progress?

Tracking Systems

We will capture quantitative (e.g., *number of* emerging tensions) and qualitative (e.g. *description of* tensions) data via an internal tracking system that all team members can access throughout the grant cycle. Additionally, we will spend a portion of each weekly team meeting adding to the evaluation tracking system with concrete examples across the five process indicators. The tracking system provides a practical and effective way to gauge progress toward project goals and emerging themes.

Contributions to the Field

In addition to the primary work of identifying initiatives that advance collective wellbeing, an important secondary contribution of our work will be a nuanced description of the conditions that give rise to collective wellbeing within our team. Otto Scharmer, co-Founder of the Presencing Institute⁶, reminds us that “the success of an intervention depends on the interior condition of the intervenor.” In other words, to move the needle on the wellbeing of others, we must first attend to our individual and organizational wellbeing. Our evaluation, complemented by data gathered across our interviews with members of the collective wellbeing community in the United States and across the world, will provide key insights into the tools, skills, activities, and mindsets that facilitate collective wellbeing within teams and organizations.

⁶ The Presencing Institute. (2021). Retrieved December 11, 2021, from <https://www.presencing.org>.

Best Practice

Introducing DE into the exploration phase of a research project is critical for grantees and can enhance the overall methodological design. Among their recommended strategies for effective evaluation, The Council on Foundations⁷ suggests grantees start early on their evaluation planning, answering the following key questions:

- What are you really trying to do with this project?
- What is going to happen that can tell you whether or not you have succeeded?
- How will you know if it happens or not?

When we skip evaluation opportunities in the early stages of program planning, we risk allocating resources to efforts that do not achieve project goals and objectives and may even do harm to the organizations and communities that we engage. More so, we lose opportunities for equitable and participatory input from program stakeholders who can help redirect issues as they emerge.

Our team holds expertise in participatory and development evaluation methodologies that add value to the Foundation and to grantees across program areas. Our practical, low-cost, high-yield approach can easily be adapted regardless of program area, sector, field, etc.

⁷ Council on Foundations. (2018). *35 Keys to Effective Evaluation*. Retrieved December 11, 2021, from <https://cof.org/>.

Developmental Evaluation Summary

Background

In accordance with our developmental evaluation plan, our team discussed five indicators (process, tensions, victories, internal wellbeing, emerging themes) at weekly team meetings throughout the grant cycle (October 2021 - February 2023). Our conversations were extremely generative, allowing time and space to integrate learnings from the week's meetings, conversations, news, and personal events. In many cases, what we share in this summary is written in the voice/language of how team members expressed their thoughts and feelings throughout our conversations. Below is a summary of key themes.

Process Observations

Count: 20

Key Themes:

- **Complementing areas of struggle and stride.** We are a diverse team with myriad skills, experiences, and networks. We believe our differences are a strength. At the same time, we have seen that how we learn and communicate requires a highly adaptable and compassionate work-style, especially for a fully remote team. While the following examples may seem insignificant, these process adaptations demonstrate compassion and awareness that there is not just one way to work:
 - We **gave each other permission** to name the parts of working together that were hard. We did not shame one another for our challenges and looked for proactive solutions to address our concerns.
 - We created **open access tracking systems** that allowed for transparency on progress. In situations where access to online systems proved challenging, another team member was **readily available** to walk through how to engage with online technologies.
 - Not everyone felt comfortable sharing on-the-spot feedback during Zoom meetings. We **took the pressure off** by being in daily communication with each other over email and providing timely updates on issues that were not completed during meetings.
 - We were not wedded to specific job roles or hierarchy, so it was easy to **ask anyone on the team to help** with a task that might usually seem like something you could not ask another colleague to do. For example, one of the team members was struggling to craft an email describing a specific portion of our project. Another team member offered to draft the language for them. At no

point did it seem like one person was being asked to do “busy work” or to take on a subordinate role. Rather, we took the opportunity to do something for a team member that would have been difficult for them in order to improve work processes and demonstrate compassion.

- **Humanizing how we work together.** The relational aspects of our process have a huge influence on our progress. By seeing the fullness of our lives, we built trust that helped us to stay more open to emergence. We spoke countless times about the difficult realities of the current moment. Sometimes personal and societal stressors were so significant that it made working nearly impossible. By allowing each other to be fully sensing beings, we felt safe to share how we were feeling and could trust each other to support us no matter what was happening in our lives. The following are examples of how we humanized our work processes:
 - We started every meeting with a **wellbeing check-in**, making time and space for each other to talk at length about parts of our lives that might not usually be welcomed in a traditional work environment. This helped us to feel seen and heard as real people (rather than widgets), allowed us to be vulnerable, and increased intimacy and trust. We were able to get to know each other's strengths on account of our candor, and we gained insight into various aspects of each other's lives, creating infinitely more compassion.
 - We **openly struggled** to focus after learning about yet another mass shooting or other devastating events happening in the world. It was vital to provide space, to learn about the different ways we each protect ourselves and process grief, make meaning, and move forward in times of despair. We supported each other to hold hard truths without being cynical by sharing messages that uplift will still conveying rage, hurt, fear.
 - Each one of us experienced personal circumstances where we were not able to work fully. We **saw each other as human beings first**. Doing this naturally afforded flexibility to take the time we needed in difficult situations to focus on our priorities and not feel stressed about work. We created a shared understanding that it might take longer to get the work done and that others could support where needed. There was a sense of compassion for others in whatever situation arose.
- **Time for integration.** The quantity of information that we absorbed during the grant cycle was immense. At times, we felt saturated and stuck in the overload. We recognized early on that we needed to build in deliberate ways to pause and integrate

learnings before plowing ahead. The following are ways that we made sense of all that we learned:

- The week before our first in-person team retreat, we **canceled all meetings and focused on synthesizing and distilling** all of our key learnings to date. This prepared each of us to participate fully in the retreat in a more engaged and thoughtful way.
- We made **time for conversations that were not just about getting something done** but were for the sole purpose of harvesting, synthesizing, deep diving, and generative learning. It was important to understand the trends we were seeing in our lives and society and how they related to our work. We continue to make the time for these conversations when everything in our culture says go faster and do more.
- We enjoyed reviewing the developmental evaluation tracker weekly as a **sense-making tool** to document emerging themes and flesh out our learnings. It also was a way to be **intentional about how our decisions affect one another** and make evident our assumptions and bias.

Points of Tension/Emerging Issues

Count: 9

Key Themes:

- **The "clunkiness of something new."** There was a large learning and relational curve as we engaged as a team for the first time. Below are some of the tensions that we encountered throughout our time together and how we worked through them:
 - Bringing together **different teams, different work styles, different systems, new language**, etc. is hard even with a shared conceptual foundation and respect and admiration for each other. The ability to voice concerns, tensions, conflicts, and hold a space to address issues rather than leaving them unattended was vital to avoiding ongoing resentment and frustration.
 - New technologies created a **steep learning curve** that was time consuming to adopt. We provided specific training on tools that we implemented and **made decisions about tool selection based on the people who would use them** most.
 - Some of our greatest frustrations with each other were fully unintentional and resulted from a **lack of understanding** of how we work, communicate, and

insight into how our responsibilities pose contingencies for how others get their work done.

- **Volume vs. resource.** Our work responsibilities often outweighed the financial resources available to complete them. This meant that we needed to let go of perfection and make peace with a minimum viable solution. We also learned that it takes a lot of time to do things differently. Below are key examples of how we strategized to prioritize key deliverables and our collective wellbeing:
 - Each of us was **balancing a number of initiatives** in addition to working on the mapping project. At times the volume of work, as well as flipping between so many different projects, was overwhelming. We implemented a variety of strategies to make time for deep work, including setting aside work days without meetings, as well as updating each other if/when we needed additional time to complete tasks. Transparency was vital to reduce stress when tasks needed longer to complete than anticipated.
 - We all have felt extremely stressed about inconsistent funding and how we are unable to plan for long-term financial sustainability. We are often **asked to build 5 year plans with intended outcomes, yet we are uncertain if we will be funded** to see them through. Rather than a 5 year plan, we have created a shared vision and are consistently adaptable to new opportunities and challenges.
 - Weekly team meetings were a place where our collective stressors surfaced. With so many things to accomplish, we had trouble accomplishing all of our tasks early on. We were concerned that items that kept getting bumped to the following week's meeting might make it seem like we did not see them as important, when in fact that is not the case. To help with this, we **designated a meeting facilitator** and **adopted a consent agenda format** that would allow for a simple yes/no answer to several agenda items that would be sent ahead of time, creating space for more discussion on key items.
 - Not everyone needs to be involved in every decision. It is stressful to try and coordinate all of us for every decision. We created a **culture of trust** where everyone can make decisions on behalf of the group when needed.
- **Straddling old and new paradigms of work.** We constantly felt the push and pull of managing old habits and expectations of how we are "supposed to" work with how to

work in a way that promotes collective wellbeing. Below are examples of our challenges to work through the tensions of creating a new kind of work culture:

- We found ourselves asking the questions, “ **What constitutes work? Are we kicking the can or tilling the soil?**” We spent a significant amount of time connecting with system stakeholders, presenting at conferences and other key wellbeing events, curating and hosting convenings to advance the field, and engaging in generative conversations with each other to make sense of what we were learning. All of these were vital to our understanding of collective wellbeing, and none of them formally “counted” toward our deliverables.
- Working to co-create a culture of care and wellbeing meant **communicating with each other in ways that, at times, made us feel vulnerable and out of our comfort zone**. We did not avoid hard topics, for example, times where we felt let down, frustrated, or misunderstood. This was extremely difficult because it could easily be interpreted as shaming/blaming. We also did not have previous experiences of working in work cultures where it felt safe to be fully transparent about ways that we felt hurt by colleagues. This is an ongoing challenge that we try to address with as much compassion as possible.
- The way our team works to address collective wellbeing relies highly on emergence and is complex. There is no straight path or recipe to co-creating collective wellbeing. This paradigm opens the doorway for creativity and relationships that we could not have planned for, but it also goes against the current paradigm of planning in advance for outcomes several years down the road. Taking an **emergent strategy** meant leaning into the unknown and acknowledging the fear that comes up in us, especially when it relates to funding an atypical way of working. This work is truly a ‘build the plane while you fly it’ endeavor, and we continue to **vacillate between pride and fear**.

Points of Victory/Emerging Successes

Count: 9

Key Themes:

- **Relationships/partnerships.** The greatest achievements that came up for us were relational, i.e. emerged through the partnerships we built throughout the course of our work together. Below are key relationships that supported our success:
- Receiving the RWJF grant was extremely validating for our team. There was a very big lead up, moving into the fog, lots of discussion, setting conditions, etc. Getting the grant had a **catalytic effect on our confidence**, creating new

partnerships and opening doors for emerging opportunities. We want to be seen and recognized for who we are and what we do. The grant did just that.

- Partnering with [Schema Design](#) was extremely helpful to bringing our deliverables to life. It was important to us that viewers could see the interconnections between system stakeholders. Working with Schema felt like having an extended group of team members who could enhance the clarity of our message and present our data in a compelling and useful way.
- Team members were asked to participate in **Julia Kim's Leadership for Wellbeing cohort**. On several occasions, Julia asked our team to present about our work, theory of change, as well as ways that we are working to promote a culture of care within our team. Our presentations were extremely well-received and led to spin off partnerships with other cohort members.
- Hosting our first **in-person team retreat** was extremely valuable to feeling connected to one another and to making huge strides toward creating the infrastructure for what would end up being our final themes and deliverables. The retreat felt like a true celebration of our partnership, progress, and hopes for the future.
- Two team members attend the **Wellbeing Summit in Bilbao** hosted by [The Wellbeing Project](#). The event was a wonderful opportunity to make connections, position our group in the international wellbeing space, and generally continue to deepen our understanding of the wellbeing ecosystem.
- **Shaping the space**. Our team had the opportunity to present, network, and connect at numerous wellbeing events. At each, we had the chance to describe how we are thinking about collective wellbeing and add our voice to the wellbeing ecosystem.
 - It's about making the connections; it's about how we talk about the work; it's about how we curate meetings and connections that center wellbeing as a priority; it's about creating conditions for wellbeing with and for each other as a global community; it's about **making wellbeing real for ourselves and others**. It's a work in progress.

Internal Collective Wellbeing

Count: 12

Key Themes:

- **Culture of care.** From the start of the project, we took the wellbeing of our team seriously and made it a priority as much as any project deliverable or outcome. We also were clear that collective wellbeing means making space for people to be unwell and to take the time and space they need to tend to various parts of their lives. Below are examples of how we fostered a culture of care:
 - **Purpose:** We selected roles and activities that were connected to our sense of purpose and allowed for flexibility throughout the project. Doing so offered the ability to trade tasks with each other rather than feeling stuck, which led to improved satisfaction with work activities and opportunities for growth.
 - **Trust + autonomy:** Whenever we needed time to care for ourselves, we trusted that each of us were doing the best that we could do to get our work done. We did not ask each other to work when we were sick or were experiencing adversity in our lives. For example, one of our team members experienced an unexpected death in their family during the grant cycle. We demonstrated our support by encouraging them to spend extended time with family with no expectation of working. Doing so sent the message that they matter as a whole person and not just a worker on our team. There is the feeling that the same compassion would be afforded to all of us and that our relationships are not transactional. This is the underpinning of a culture of care.
 - **Transparency:** As a team, we co-created job titles, roles, responsibilities, and salaries. There was no “boss”. Selecting job titles reflects our commitment to co-ownership and self-management rather than hierarchy. This helped to reduce power dynamics that can create tension among team members. We also did a deep dive into budgeting and how internal spending decisions are made. We spent a considerable amount of time reviewing line items in the budget where there is discretion for how funds are spent. By being intentional to understand budget decisions, we avoided conflict, confusion and frustration over budgetary issues further along in the grant cycle.
- **Living the question.** None of our teammates had experienced a culture of care at former jobs and thus had no reference point for what collective wellbeing looks and feels like in organizations. For this reason, we were ‘living the question’ of what it could be like to truly create and experience a culture of care at work. We all felt the push/pull struggle of wanting to prioritize wellbeing and feeling that doing so was in opposition to

how we are incentivized to work. Below are examples of the challenges we encountered:

- We processed the emotional gymnastics of trying to live our values of taking care of ourselves and our team with the reality that, even in the wellbeing space, many people and organizations are not doing so. This was a learning from our interviews. Stakeholders are often tied to policies around the number of days off of work that do not realistically match the needs of workers, especially those caring for other family members. We grappled with **feeling entitled for believing we deserved to work in a different way to promote our wellbeing and yet chose to lean into the discomfort** in service of each other.
- Through our participation in Julia Kim's leadership for wellbeing cohort, we heard her speak about the Buddhist concept of the **bardo - the liminal state between life and death**. Creating a culture of wellbeing felt like living and leading from the bardo. It is a place of uncertainty and possibility, and sometimes fear. Trying to play by the rules of the game as they are today while creating new rules at the same time was a constant dance of **trial and trust**.
- We grappled deeply with the reality that creating a culture of wellbeing is **not about avoiding conflict**. We spent significant time talking with each other and attempting to understand different points of view. When conflicts were particularly challenging, we worked with facilitators in order to find compassionate solutions

Emerging Themes & Patterns

Count: 19

Key Themes:

- **Wellbeing is in the mainstream consciousness.** Wellbeing is in the hearts and minds of our global awareness. We are hearing about it in the Atlantic, New York Times, BBC, Times of India, TikTok, podcasts, etc.. The various entry points to the wellbeing discussion signal a growing appetite to learn and engage with wellbeing as a framework and way of being.
- **An inclusive collective wellbeing conversation.** To create a more inclusive conversation about wellbeing, we listen for cues that we are talking about a similar feeling of what it is like to experience wellbeing. This is because the language of wellbeing does not resonate with all groups, and we do not see that as a problem. Rather, we look for keywords such as resilience, flourishing, quality of life, equity, sustainability, and countless other proxies that signal a shared set of values.

- **Diversity, equity, and inclusion (DEI) and collective wellbeing are not separate.** We cannot reach collective wellbeing without DEI, and we cannot achieve the goals of DEI without an aspiration toward collective wellbeing. If we believe that collective wellbeing is fundamentally about healing a sense of division between self, others, and nature, DEI work is necessary to this paradigm. Oppression, segregation, and myriad “isms” are raging due to the false belief that one group is better than - or should have power over - another. Seen through a collective wellbeing lens, racial healing, reparations, inner work, and systems change are all necessary. We see infinite possibilities by aligning the values of DEI and collective wellbeing rather than framing them as distinct tracks.
- **What creates the conditions for collective wellbeing to emerge in organizations?** While practical and logistical factors such as flexible work schedule, remote work options, generous family leave, etc are welcomed, the aspects of work most associated with whether workers stay or leave have to do with the [work culture](#). Feeling one can be their authentic self, living one’s sense of purpose, connection to colleagues and clients, the pace of the work day, the quantity of work demands, etc. matters. It is also paramount that leaders set the tone for an organizational culture that gives and receives permission to make mistakes, to take chances, and that promotes kindness, trust, and shared accountability. Self-managing organizations are one approach we have seen can be helpful to leveling traditional hierarchies and supporting the leader in each of us to flourish.
- We have learned about several organizational create **policies that are branded under wellbeing or personal wellness but that have the potential to exploit workers.** For example, along with the uptick in remote workers during the pandemic, there was a parallel rise of monitoring software to track every activity that workers engage in throughout the day. Doing so erodes worker trust and autonomy. Additionally, in a move to stay current with changes in work perks, some organizations are moving toward a 4 day work week model, or other ways for employees to experience greater flexibility. We see tremendous benefits to this approach and also caution employers to ask themselves if they are asking employees to do the same amount of work in less time (potentially raising stress) or are they promoting a culture of care where employees have more time for creativity, family, and wellbeing?
- **The significance of leadership for collective wellbeing.** Time and again, we have learned about organizations and communities that have made great strides toward collective wellbeing. Often organizations cite supportive leadership as a cornerstone of their success. However, during periods of upheaval, the values of collective wellbeing are often extremely vulnerable to the whims of changing leadership. We have

experienced these effects firsthand across nonprofit, city government, higher education, and international collaboration settings.

- **Bringing embodied practices into knowledge-based systems.** We are often incentivized to engage deductive approaches that rely heavily on analytic reasoning to make sense of a given phenomenon. Even participatory methodologies can be prescriptive when we “plug in” an inclusive set of stakeholders yet place limits on ways of knowing and feeling to inform all aspects of program design and analysis. We have connected with an elaborate network of **social arts practitioners** across cultures, silos, and sectors that intuitively understand the need to bring forth embodied, indigenous, ancestral, and creative ways of knowing. Through methodologies such as Social Presencing Theater, improvisation, yoga and expanded consciousness, etc, embodied practices trust a felt sense of knowing, or intuition, about how to address deep systems change, alongside analytic ways of knowing. The various approaches are not in opposition to one another; however, we see the need to lean more heavily into somatic practices to bring the body and spirit connection along with the analytic mind.
- **Couldn't it be enough?** Couldn't it be enough for our mission/impact as a team was to change mindsets around collective wellbeing? We would do so through modeling brave leadership and risking being seen as “soft” or “unscientific” as we lean into love and possibility as the gateways to collective wellbeing. We would practice deep rest, vulnerability, transparency, and compassion as viable pathways to social change. Do we need to do more? When will it be enough?
- **Collective wellbeing isn't sexy.** We have all heard pressing social justice topics and approaches thrown around and labeled as “sexy,” or on the leading edge. The reality is that collective wellbeing - and what it takes to create a culture of care - is not sexy at all. It is a slow, complex, primal, and vulnerable endeavor that does not happen on the first date, so to speak. However, when there is a dedicated commitment to co-creating collective wellbeing for each other, the process is deeply affirming and gives glimmers of an emerging future where our wellbeing is clearly connected to the wellbeing of others.
- **Theory of change.** Change happens in the short-term (awareness/knowledge building), middle-term (action/behavior) and long-term (social/civic/environmental conditions) that lead to impact (collective wellbeing). Deep system change is an iterative process. The work of collective wellbeing is as much about the highly relational nature of its process as the outcome.

