ISE4GEMs

A new approach for the SDG era

Inclusive Systemic Evaluation For Gender Equality, Environments & Marginalized Voices

Presenters: Shravanti Reddy, Anne Stephens, Ellen Lewis
Introductions

Shravanti Reddy, Evaluation Specialist, Independent Evaluation Service, UN Women

- Leads complex global and joint evaluations
- Develops evaluation approaches, methodologies and guidance including the UNEG Guides on Integrating Human Rights and Gender Equality in Evaluation

Ellen Lewis, PhD
Ethos of Engagement Consulting & Centre for Systems Studies, University of Hull, United Kingdom

- Organisation Development Consultant
- Researcher – Systems Thinking developed a tool for gendered systemic analysis
- Focuses on how social systems attend to environmental sustainability, social justice, and community development.

Anne Stephens, PhD
Ethos of Engagement Consulting & James Cook University

- Sociologist, critical systems thinking theorist, teacher and research manager, health/education evaluations for Northern Australian communities
- 2016 Endeavour Research Fellow
- Author of the book Ecofeminism and Systems Thinking - catalyst for the GEMs framework.
Acknowledgments

• Independent Evaluation Service, UN Women, New York, United States

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• The Cairns Institute, James Cook University, Cairns, Queensland, Australia

• Centre for Systems Studies, Faculty of Business, Law and Politics, University of Hull, United Kingdom

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- **Bob Williams**, Independent Evaluation and Systems Thinking Consultant, New Zealand
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- **Matt Keene**, U.S. Environmental Protection Agency, Office of Policy, United States
- **Rituu B. Nanda**, Constellation/Institute of Social Studies Trust, India
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- **Chris Walsh**, College of Arts, Society and Education, Division of Tropical Environments and Societies, James Cook University, Australia
- **Sophie Yates**, Australia and New Zealand School of Government, Australia
- **Kerry Zaleski**, University of Wisconsin, Madison, School of Medicine and Public Health, Population Health Institute, United States
Literature Review
Agenda 2030:SDGs

The interconnectedness of the Sustainable Development Goals
What is Systems Thinking?

- **Interrelationships**: connections between people, things or ideas.

- **Perspectives**: formed by values, beliefs and what we know about the world.

- **Boundaries**: Defined by our knowledge, resources, ideas, values, biases, priorities or perspectives.
What is ‘Systemic’ Thinking?

• **Systematic** analysis implies a thorough, predictable, and controlled process which is essentially reproducible but may not consider all the interactive parts of the system and stakeholders.

• **Systemic** analysis encourages a critical and holistic analysis of the opportunities, constraints, and relationships of parts within a system, analyzing the system as a whole.
Systemic Theory of Change

A systemic ToC or SToc is established by asking a wider set of questions that more fully describe the change processes through different perspectives. STocS are developed using a second-order judgment from a position outside of the intervention looking in. By viewing the change processes of the intervention from this position, you open up different possible boundaries for understanding change processes to determine the most relevant ones for consideration.
Intersectionality
ISE4GEMs Approach

Intersectional situation

MARGINALISED VOICES

GENDER EQUALITY

ENVIRONMENTS

Interconnected GEMs dimensions
Key elements of ISE4GEMs

- **Ethics** to empower and enable individuals and communities
- **Validity and rigour** through inclusive interpretation
- **Transdisciplinary mixed methods** for socio-environmental analysis
- **Capacity development** on systems thinking and GEMs
- **Attributes and competencies**
Part B
Practitioner Approach
Stages of the ISE4GEMs

**PHASE I:** Preparation and Design

**PHASE II:** Data Collection

**PHASE III:** Data Analysis, Interpretation and Reporting

**PHASE IV:** Capacity Development for Social Change

Timeframe
Stages of the ISE4GEMs

**PHASE I**

**Chapter 5**

**PLANNING AND DESIGN**

**STEP 1: The Boundary Story**
- Conduct a first-order boundary analysis of the intervention
- Complete a stakeholder analysis
- Develop the Boundary Story

**TOOL 1: First Order Boundary Analysis of the Intervention**
**TOOL 2: Stakeholder Analysis of the Intervention**

**STEP 2: The evaluation boundary**
- Define the ideal evaluation boundary using a second-order analysis and stakeholder analysis
- Define the actual evaluation boundary through a vulnerability and evaluability assessment
- Develop the evaluation design document

**TOOL 3: Second-order boundary analysis**
**TOOL 4: Vulnerability Assessment for the Evaluation**
**TOOL 5: GEMs Evaluability Assessment**

**STEP 3: ISE4GEMs Planning and Design considerations**
- Define and complete the columns on the ISE4GEMs planning tool

**TOOL 6: ISE4GEMs Planning Tool**
**TOOL 7: Transdisciplinary methods and tools**

**PHASE II**

**Chapter 6**

**DATA COLLECTION**

**Step 1: First Data Collection Cycle**
- Check your boundaries
- Conduct remote data collections
- Conduct the first data audit

**TOOL 6: ISE4GEMs Planning Tool**

**Step 2: Second Data Collection Cycle**
- Check your boundaries, again
- Use of field-based data collections, tips on the first field-based team meeting, data collection and data audit

**Step 3: Debriefing meeting and practitioner reflection**

**TOOL 7: Transdisciplinary Methods and Tools**
**TOOL 8: Facilitator's Field Guide Meeting Planner**

**PHASE III**

**Chapter 7**

**DATA ANALYSIS, INTERPRETATION & REPORTING**

**Step 1: The Systemic Triangulation framework for data analysis**
- Develop the facts by identifying findings and evidence of changes
- Determine values and perspectives on the meaning of change
- Interpret the meaning of change within a specific boundary

**Step 2: Develop the STOC and final boundary story (Optional)**
- Reflections on the ISE4GEMs' validity

**Step 3: Draft report conclusions and recommendations**
- Report Writing, Conclusions and Recommendations

**TOOL 9: GEMs Data Analysis**
**TOOL 10: GEMs Integration Tool**

**PHASE IV**

**Chapter 8**

**CAPACITY DEVELOPMENT FOR SOCIAL CHANGE**

- Identify and implement capacity development opportunities
- Implement strategies for knowledge sharing and communicating evaluation results

**Final reflections**
**TOOL 11: Final reflections**
CHAPTER 5

PHASE I - PREPARATION AND DESIGN

- Step 1: The Boundary Story
- Step 2: The evaluation boundary
- Step 3: ISE4GEMs Planning and Design considerations
Evaluation Boundary

Ideal Boundary of the Evaluation

Boundary Story of the Intervention

EVALUATION

GENDER EQUALITY

ENVIRONMENTS

MARGINALIZED VOICES

INTERVENTION
**Planning and Design**

**Tool 6: ISE4GEMs planning tool**

**Implementation plan**

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<td>Evaluation key questions</td>
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CHAPTER 6

PHASE 2—DATA COLLECTION

- Step 1: First Data Collection Cycle
- Step 2: Second Data Collection Cycle
- Step 3: Debriefing meeting and practitioner reflection
Data Collection

- Continuous reflection
- Adaptation
- Cycles of data collection and emergence
- Transdisciplinary methods
- Capacity Development
CHAPTER 7

PHASE 3—DATA ANALYSIS, INTERPRETATION AND REPORTING

- Step 1: The Systemic Triangulation framework for data analysis
- Step 2: Develop the STOC and final boundary story (Optional)
- Step 3: Draft report conclusions and recommendations
PHASE 4-CAPACITY DEVELOPMENT FOR SOCIAL CHANGE

- Opportunities for Capacity Development
- Dissemination and Communications Methods
- Final practitioners’ reflections
• Work in partnership to build mutual capacity.
• SDGs have specific targets related to capacities included under Goal 17 on partnerships
• Underscores the 2030 Agenda
• At the core of policy failure in some sectors, especially in developing countries.
Tool 1: First-order boundary analysis
Tool 2: Stakeholder analysis
Tool 3: Second-order boundary analysis
Tool 4: Vulnerability assessment
Tool 5: GEMs evaluability assessment
Tool 6: ISE4GEMs planning tool
Tool 7: Transdisciplinary methods and tools
Tool 8: Facilitators’ field guide meeting planner
Tool 9: GEMs data analysis
Tool 10: GEMs integration tool
Tool 11: Final reflections
Next Steps

- Piloting
- Capacity development
- ISE4GEMs Community of Practice
  - Contributions for *Inclusive Systemic Thinking* book
    *(Routledge 2020 - 2021)*
THANK YOU

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