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Using developmental evaluation methods with communities of practice

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Abstract

Purpose

This research explored the use of developmental evaluation methods with community of practice programmes experiencing change or transition to better understand how to target support resources.

Design / methodology / approach

The practical use of a number of developmental evaluation methods was explored in three organisations over a nine month period using an action research design. The research was a collaborative process involving all the company participants and the academic (the author) with the intention of developing the practices of the participants as well as contributing to scholarship.

Findings

The developmental evaluation activities achieved the objectives of the knowledge managers concerned: they developed a better understanding of the contribution and performance of their communities of practice, allowing support resources to be better targeted. Three methods (fundamental evaluative thinking, actual-ideal comparative method and focus on strengths and assets) were found to be useful. Cross-case analysis led to the proposition that developmental evaluation methods act as a structural mechanism that develops the discourse of the organisation in ways that enhance the climate for learning, potentially helping develop a learning organization.

Practical implications

Developmental evaluation methods add to the options available to evaluate community of practice programmes. These supplement the commonly used activity indicators and impact story methods.

Originality / value

Developmental evaluation methods are often used in social change initiatives, informing public policy and funding decisions. The contribution here is to extend their use to organisational community of practice programmes.

Key words:

communities of practice, evaluation, developmental evaluation, action research, knowledge management, learning organization

Article classification: research paper.

Author biography

Dr Christine van Winkelen has been the academic lead on a wide range of collaborative research projects within the Henley Forum for Organisational Learning and Knowledge Strategies at the Henley Business School since its inception in 2000. She has extensive experience in industry and teaches MBA modules on strategy and knowledge and organisational learning at two UK business schools.

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Using developmental evaluation methods with communities of practice

1. Introduction

Communities of practice (CoPs) are well-established within many organizations to support individual and organizational learning. CoPs are groups of people who "share a concern, a set of problems, or a passion about a topic, and who deepen their knowledge and expertise in this area by interacting on an ongoing basis" (Bolisani and Scarso, 2013). They reduce reliance on key individuals and allow a collective intention to advance learning in a domain to be realised: the "shared commitment to a domain and to the group of people who care about it is a learning resource" for the organization (Wenger et al., 2011, p10). Examples of the benefits to be gained from CoPs working across the formal structures of the organisation include enabling the effective implementation of agile software development methods at Ericsson (Paasivaara and Lassenius, 2014) and improving oil exploration efficiency at ConocoPhillips (McDermott and Archibald, 2010).

When CoPs first became a recognised part of an organisation's knowledge and learning strategy their informal nature was emphasised, conceptually drawing on situated learning theory (Wenger, 1998). This identifed the importance of learner engagement in context as the basis for meaning-making and learning and positioned this engagement as a voluntary process. It also explained the observation that groups emerged around topics and themes outside of the formal structures of the organisation. However, as the value from this vehicle for organisational knowledge sharing and collective learning was increasingly recognised, opportunities to amplify this were sought (Wenger et al., 2002). By 2010 (McDermott and Archibald) studies showed that the pressures facing organisations meant that unsupported CoPs often floundered and faded away. Practice shifted from treating CoPs as inherently emergent and voluntary systems, to crafting interventions that allowed them to deliver more value (Wenger, 2010). Investing resources (time, technology, training, communication initiatives etc) in CoPs quite rightly leads to questions of whether these are being used wisely. The research presented here explores the use of developmental evaluation methods to evaluate community of practice programmes during a period of change or transition to determine how best to support them and increase the value they deliver in the new context.

Although there is widespread acceptance that CoPs are useful, formally assessing their value and understanding what helps them to be more effective is less easy: they are complex social systems and it is inherently difficult to directly connect cause and effect. A recent comprehensive review of the approaches to evaluating CoPs (McKellar et al., 2014) identified that activity indicators are commonly used to show levels of engagement, while carefully crafted stories are often used to show the richness of the value delivered. The use of stories reflects the need to acknowledge many interacting influences and effects (Wenger et al., 2011).

The developmental evaluation approach described in this paper is not intended to replace these methods. Rather it is intended to supplement them specifically during periods when a CoP programme is being developed or is in transition. Developmental evaluation takes social complexity into account and this research has demonstrated that it can generate insights into where to focus interventions in CoP programmes. The approach is characterised by a learning orientation and the active involvement of CoP participants (Patton, 2011). To our knowledge, developmental evaluation as a methodology has not previously been explicitly applied to organizational CoP programmes, although we do acknowledge that evaluation methods that fall within the scope of developmental evaluation are similar to practices used to promote peer learning in knowledge management initiatives (such as after action reviews, see for example Collison and Parcell, 2004 for a variety of practical approaches) and the approach is commonly used in social development (see for example Patton, 2011 for examples ranging from international aid programmes to health and education initiatives), some of which may involve social communities.

The next section provides an overview of the conceptual rationale and this is followed by details of the nine month action research project involving knowledge managers from three organizations who tried out a variety of developmental evaluation methods in their CoPs. Overviews of the three cases are presented, followed by a discussion arguing that adopting developmental evaluation principles promotes a key benefit being sought from CoPs – enhanced organizational learning – as well as allowing support resources to be targeted more effectively.

2. Conceptual Rationale

It is difficult for knowledge managers to know how best to shape the most influential set of knowledge and learning practices for their organizations as these sit within a complex, changing environment. Alvesson and Karreman (2001, p995) comment "knowledge is an ambiguous, unspecific and dynamic phenomenon, intrinsically related to meaning,

understanding and process, and therefore difficult to manage." Although a well-developed learning capability offers the potential for improving overall performance (Goh et al., 2012), it is not straightforward to attribute performance outcomes to any particular change or practice.

Other organizational initiatives also build learning capability and potentially amplify the impact of knowledge and learning initiatives, including for example introducing 'lean' and 'agile' principles into the organization (Putnik and Putnik, 2012), implementing business process reengineering initiatives (Vakola and Rezgui, 2000), or leadership development programmes (McKenzie and Aitken, 2012). Jakubik's review (2011) of social learning principles reiterates that "learning is located not in individual heads, but in the processes of co-participation and in experiences," (p384), adding it is iterative, co-constructed and deeply influenced by interacting features of the context.

Evaluating initiatives intended to improve knowledge sharing and organizational learning in isolation from other organizational and social practices is not straight forward. In their systematic literature review of CoP evaluation frameworks, McKellar et al (2014, p396) note that CoPs "exhibit elements of a complex intervention, bringing about certain evaluation challenges." They go on to cite Patton (2011) in clarifying this: "a complex intervention has characteristics of nonlinearity, emergence, adaptation, uncertainty, dynamic interactions and co-evolution." They identify various features that contribute to the inherently dynamic nature of communities of practice (McKellar et al., 2014, p396): networks change and evolve and new members take part; the focus and priorities of the CoP can shift; CoPs can operate on multiple scales in an organization so there are multiple levels of impact: individual member, network level, organizational level; multiple timelines are involved – some short-term and some longer-term. This suggests that approaches to evaluation suited to a complex social context need to be considered in relation to CoPs.

Evaluation differs from research in that there is an intended user who will adopt the findings from the evaluation exercise. Evaluation principles used to require separation of evaluator from user for objectivity. However, there was often disappointing user adoption of evaluation findings. Organizational learning theory suggested that users' involvement in the evaluation process itself could address this (Cousins and Earl, 1992). Hence collaborative, participatory and empowerment processes emerged as related themes in evaluation research during the 1990s. By 2000, Gregory (2000) concluded that the arguments for a participatory approach were sound in terms of both usability and transformational evaluation purposes, but all too often political considerations (for example, who should be involved) were not properly considered. Through the first decade of the 21st century, stakeholder participation in evaluation was examined (Daigneault et al., 2012) and now political dimensions are included in participatory evaluation design.

It became clear that participatory evaluation could become an organizational learning exercise in its own right as it involves the social production of knowledge. Stakeholder groups participating in the evaluation "learn to reflect on their own experiences, mutual interactions and shared information" (Suarez-Herrera et al., 2009, p323). Participatory evaluation has the potential to be a basis for transformational learning (Jakubik, 2011) in which underlying strategies and assumptions are challenged, but this requires an environment which expands the capacity of those involved "to create, to think and to act openly in the quest to learn together" (Suarez-Herrera et al., 2009, p335).

Patton (2011) has examined the evaluation implications of social complexity in situations of change, proposing the term 'developmental evaluation' to describe this. Developmental evaluation demands evaluative questions and thinking about evidence as a team conceptualises and tries out new approaches to an activity. It is particularly suited to the exploration and innovation stages of change and requires evaluators to be flexible, creative, adaptable and "able to facilitate rigorous evidence-based reflection to inform action" (Patton, 2011, p26).

In view of the complex social context of CoPs, developmental evaluation appears suitable when there is a need to consider the implications of change on CoP programmes. This frames the rationale for this research: to explore the contribution of developmental evaluation methods in relation to organisational CoPs experiencing a period of development or transition.

3. Research design

This research took place within an inter-organizational community of inquiry (Coghlan and Shani, 2008), here termed 'the Forum'. This is an established cross-sector group of organizations in which academics research with practitioners (Bradbury, 2008) into topics related to knowledge management and organizational learning. Knowledge co-creation through collaborative research develops the practices of the participants as well as

contributing to scholarship in the field. The approach adopted in the Forum is broadly consistent with the principles of engaged scholarship (Van de Ven and Johnson, 2006).

Action research is a suitable research design in the Forum being grounded in "lived experience, it responds to a real need that people have, and it is developed in partnership with these people" (Bradbury, 2008, p586). Action research is "a participatory process concerned with developing practical knowing in the pursuit of worthwhile human purposes...It seeks to bring together action and reflection, theory and practice, in participation with others, in the pursuit of practical solutions to issues of pressing concern to people" (Reason and Bradbury, 2001, p1). Bradbury (2008, p589) conceptualises research quality in terms of actionability: practical value, social interaction, action/reflection cycles and active experimentation. The design of this research paid attention to these dimensions as summarised in Figure 1. Regular conference calls and an online collaborative workspace supported collective reflection and learning, while individual participants maintained their own reflective diaries. A telephone interview by the researcher with each knowledge manager after eight months prompted deeper reflection on experience.

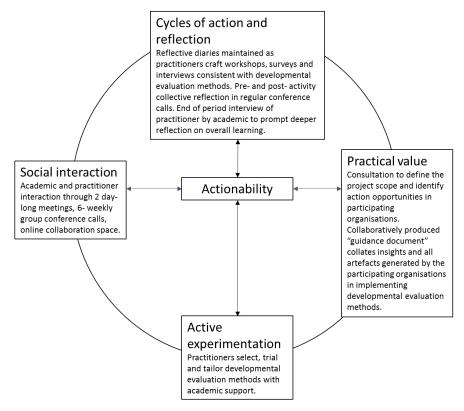


Figure 1: Actionability dimensions underpinning the research design (after Bradbury, 2008)

Developmental evaluation is an approach rather than a single method. Patton (2011) reviews the methods that fall within its scope and argues that the inquiry should be "matched to and congruent with the characteristics and dynamics of a particular situation" (2011, p263). The methods used within this action research project are described in Table 1.

TABLE 1 HERE

Table 1: Developmental evaluation methods used in the research (based on Patton (2011))

Table 2 identifies the organizations, the nature of their CoP programmes, the transition prompting the evaluation and the developmental evaluation methods that each chose to adopt.

TABLE 2 HERE

Table 2: Organizations participating in the action research.

Reflective diaries of the knowledge managers, transcripts of the interviews, artefacts from their developmental evaluation activities, and notes from the collective reflections of the group during the workshops and conference calls were collated by the researcher to prepare a consolidated narrative of each case, which was then refined through dialogue with the respective practitioner (Bradbury, 2008). Content analysis (Easterby-Smith et al., 2012) of the cases was undertaken by the researcher to identify themes at the level of the individual developmental evaluation methods and across methods and these were refined and developed in an extended focus group session at a final day-long workshop with the group.

4. **Results**

Consistent with the contextual nature of action research, the findings will be presented from the perspective of each organization in turn. In the next section, the discussion draws out cross-case insights into the value of using developmental evaluation methods for CoPs in transition.

4.1 Engineering Consulting

Evaluation activity was focused around the development, implementation and consequences of a workshop led by the knowledge manager and involving senior managers from across the UK business. The knowledge manager used the actual-ideal developmental evaluation method to revisit the collective view of the vision for CoPs in the organization, to understand what was actually happening and to shape the next stage action plan. A specially-designed company-specific maturity matrix was used at the workshop to assess ten knowledge sharing practices. This prompted a discussion of the ideal practices needed to support the direction the business is now taking, and an assessment of the current performance. The format of the maturity assessment was deliberately selected to parallel a familiar technical assessment framework.

The knowledge manager concluded that the workshop "didn't shift the view of the ideal very much. In doing the evaluation, it shifted the idea of the actual – we are not as good as we think we are," adding, "I had wondered if this view of the ideal might have changed over time, but our vision has remained the same.... The workshop was a validation and reinforcement of that ideal by senior people." The managers at the workshop recognised that more was needed to take things to the next level of performance. One manager wrote to colleagues afterwards saying that there needed to be more effort at all management levels. He described it as "escaping gravity and finding a new orbit" in terms of adoption of KM practices in CoPs. The knowledge manager used the findings from the workshop to refocus her efforts with her networks of community leaders and knowledge advocates around the organization to better align their activities with the goals of the various CoPs. She noted "I've realised that I need to pick off CoPs one by one and work on the alignment."

Developmental evaluation at Engineering Consulting was characterised by close attention to the practical realities of the business. The knowledge manager observed: "for me, developmental evaluation has come to mean looking at how things are working and then working out what you need to do about it, not just looking at how they are working. It has actually confirmed that I am on the right path with my objectives and programme, but it was a useful exercise to check this and it has gained more visibility for these plans with the senior team."

4.2 Public Performance

Developmental evaluation activities at Public Performance were led by two knowledge managers supporting different parts of the organization. Both wanted to refocus their activities in response to recently formed clusters of broadly-related communities. The first stage used the actual-ideal evaluation method drawing on an organization-specific version of a proprietary CoP maturity model with individual CoP leaders providing evidence to support their assessments. This organization expects evidence to be provided to support performance assessments in its external role with public bodies and CoP cluster leaders argued that a rigorous evidence-based approach was consistent with the culture. Some CoPs created action plans as a result of this assessment and, together with the evidence of practices, these were shared back with the communities to "provide an opportunity for them to learn from each other. They will know who to call. This makes it a peer learning tool." The knowledge managers concluded that "for us, the maturity model provides a neutral basis for looking at what is happening. If we hadn't been involved in this project, we might have focused on barriers rather than development. But it has been valuable to look at what is actually happening from a learning and development perspective."

While some of the CoP leaders were confident about the 'ideal' value that their community should be delivering to the organization and its members, others were less so, making it difficult for them to formulate action plans. Once they had assessed the 'actual' situation, the knowledge management team facilitated a workshop with key players for each of these CoPs using Appreciative Inquiry principles (Cooperrider and Srivastva, 1987) to explore their visions for the CoP. This prompted a planning discussion which continued after the workshop.

The knowledge managers initially introduced another developmental evaluation method within the workshop design – the collaboration assessment method. However, this turned out to be distracting rather than useful and they concluded that CoPs as a way of working were so engrained that it raised concerns that seemed irrelevant to practice.

Developmental evaluation at Public Performance was characterised by a peer learning orientation, with careful attention to the culturally accepted practices of the organization. The knowledge managers noted that "for us, developmental evaluation has come to be a type of evaluation that you can use in an ongoing way. Other evaluation approaches are about taking stock at a point in time and tend to be retrospective. Developmental evaluation provides frameworks for thinking about moving forward." They added, "because we have evaluated each CoP, we can tailor our KM service to those with issues to resolve."

4.3 Public Regulator

The developmental evaluation of CoPs at Public Regulator was led by the knowledge manager who had initiated a new strategic knowledge sharing framework a year previously and now wanted to align and support existing CoPs within this. CoPs here are either small groups of experts in specific knowledge domains, or larger groups of people carrying out similar job roles. Evaluation activities involved interviewing community sponsors and leaders and surveying some of the members. The fundamental evaluative questions method were the

starting point, modified to bring a focus to strengths and assets as the basis for further improvement. She also paid attention to the language of her questions, for example, replacing 'now what' with 'what next' as this was perceived to be less confrontational.

The knowledge manager worked with the politics of the organization from the outset, for example in the way she approached involving and interviewing the sponsors. Once the interviews were underway, she observed that one of the most senior CoP sponsors "went into the interview a bit sceptical, thinking it could be touchy feely, but came out and went to someone's desk immediately to say that it had been useful." She also noted that "people were relieved and encouraged when they realised that her focus was on the positives and on improvement." However, she recognised the fine balance between focusing on strengths and asking the hard improvement questions that developmental evaluation requires, observing that "one interviewee found it a challenge to switch from talking about what is working well to areas of improvement."

The knowledge manager concluded that "the exercise allowed me to identify quick wins that could be implemented easily, as well as longer term actions... The interview process has created expectations that KM will support CoP leaders in improving their activities in the future and you should definitely only embark on an exercise like this if you are willing to follow through with the action plan that results from it." She felt that the exercise increased her credibility in the organization.

Alongside the political sensitivity of her approach to developmental evaluation, her reflections on the exercise showed that she viewed this is an organizational learning process: "for me, developmental evaluation is an opportunity to stock take and look at the successes and room for improvement for CoPs in a stage of growth. Development is always ongoing: there is no utopian view of success. There are always changes in the environment, which means that it is appropriate to look at what is happening and what could be improved. It is a question as to when the end of an evaluation exercise actually is. Because the approach is developmental, it continues and feeds into future work plans. Asking the CoP leads what they are going to do next provides the basis for the next conversation with them; it creates an ongoing feedback loop."

5. Discussion

Practical aspects of using developmental evaluation methods with CoPs will be considered first and then two specific themes from the research will be developed more fully.

The developmental evaluation activities achieved the objectives of the knowledge managers concerned: they developed a better understanding of the contribution and performance of their CoPs in a changed situation, allowing support resources to be targeted more specifically. The expectations of CoP leaders and participants were raised as a result of the evaluation activities and following up on action plans was viewed as essential.

Three of the developmental evaluation approaches proved valuable for these established CoP programmes, while the focus on the nature and degree of working together was not helpful in the experience of Public Performance as it seemed to question the existing collaborative climate, which was functioning well. Care was needed with the method focusing on strengths and assets as despite being engaging and motivating, one CoP leader found it difficult to shift from identifying strengths to identifying areas for further improvement. This emphasised the importance of the interviewing skills of the evaluator in prompting "rigorous evidence-based reflection" (Patton, 2011, p26) and of building the capacity of those involved to participate effectively within different forms of collaborative inquiry (Cousins et al., 2012), particularly since strengths based approaches may not feel comfortable to those more accustomed to problem-centred investigations (Coghlan et al., 2003). The knowledge managers chose familiar evaluation methods: surveys, maturity models and workshops. Undoubtedly these would have generated value even without the developmental evaluation perspective. As the Public Performance knowledge managers said: "we would have done the maturity model anyway. We wouldn't have thought about development, but would probably have focussed on barriers. It has been valuable to be stretched in our thinking."

Two related themes emerged from the cross-case analysis in this research, the first being the impact these evaluation practices had on the discourse of the organization about what CoPs are intended to achieve, and the second being the way reflection and questioning connected developmental evaluation activities, CoPs and the learning climate in the organization.

Developmental evaluation acknowledges that in a complex situation, identifying the characteristics of success in advance needs to be treated with caution. Developing the discourse about what good looks like in CoPs requires a shared language to integrate

perspectives and move towards a desired new state within that complexity. The knowledge managers paid close attention to the prevailing practices and culture of their organizations while seeking to develop shared understanding and a new vision. For example, Engineering Consulting formatted their evaluation matrix to exactly replicate the structure of a familiar technical capability assessment framework. Developmental evaluation methods act as a vehicle to create a shared language, which helps develop shared systems of meaning in relation to CoP activities. This draws on the view of the organization as a discursive system in which "language does not merely reflect social reality but is the very means of constructing and reproducing the world as it is experienced" (Mantere and Vaara, 2008, p343).

In organizations, discourses, which are "linguistically mediated constructions of social reality," are the means through which "beliefs, values, and norms are reproduced and at times transformed in social life" (Mantere and Vaara, 2008. p341). The knowledge managers in each of the three case studies demonstrated political awareness through who they involved in the evaluation activities and how they used this to promote wider participation in the dialogue about CoPs. In Public Performance, the evaluation processes connected the KM team to discussions about the priorities of the CoPs, helped them articulate the support they could offer to achieve these, and led to an ongoing dialogue with CoP leaders.

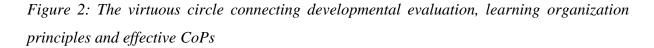
Moving on to the second theme, developmental evaluation methods are characterised by widespread participation in a challenging and critical dialogue and a learning- and futureoriented perspective. Reflection, "the process of stepping back from an experience to ponder, carefully and persistently, its meaning to the self through the development of inferences" (Daudelin, 1996, p39) is recognised as a valuable part of the process by which learning develops from experience. It has been argued that "organizational reflection implies "reflective learning" supported by organizational routines, practices and cultures" (Jordan et al., 2009, p467). Developmental evaluation methods act as a structural mechanism that prioritises reflection and prompts more challenging questioning within praxis. This promotes both individual learning for those involved, but also develops the discourse of the organization to allow criticism to be voiced and the collective capacity to question assumptions - key features of organizational learning. Jakubik argues "one key goal of collaborative learning is to enhance the critical thinking of the learners by questioning existing solutions and by creating new ones" (2011, p384). Organizational learning principles informed the development of evaluation as a discipline, while the consequence of evaluation in supporting the creation of a learning organization has been equally acknowledged (Preskill and Torres, 1999). With a learning-oriented approach, the evaluator becomes a "more actively-involved change agent," and within an organisational setting this means "involving stakeholders in the interpretation and meaning of findings and development of next steps" (Torres and Preskill, 2001, p393). Certainly this was a feature of the cases explored in this research as the knowledge managers explored the implications of the findings with the CoP leaders to create action plans.

We propose viewing this as a virtuous circle in which developmental evaluation approaches (which are based in reflection, questioning and learning) promote the ideal of a 'learning organization' (Senge, 1990). This is the environment in which CoPs will thrive and have most individual and organizational learning impact. Effective communities exist in and promote a climate of trust (Blackmore, 2010, p210) in which assumptions and practices can be tested, which in turn is the basis of effective developmental evaluation. These conceptual connections are

illustrated in







Although developmental evaluation theory argues that this kind of evaluation is most relevant in the early innovative stages of change initiatives, viewing the organization as a complex knowledge environment (McKenzie and van Winkelen, 2004) suggests the relevance of these principles over the longer term due to the inevitability of ongoing adaptation and change. Embedding developmental evaluation principles into CoP programmes requires in-built feedback processes and leadership to establish challenging, future-oriented, improvement mind sets. In this research, developmental evaluation activities were carried out as a specific initiative. However, the knowledge managers recognised the need for ongoing learningoriented evaluation of their CoP programmes: Engineering Consulting is looking at how their community of community leaders and their network of knowledge advocates could take an even greater lead in generating and acting on feedback on community health, while Public Performance is creating a community of community leaders with the same intention. Further research would be needed to follow these initiatives to establish useful approaches in practice.

6. Limitations of the research

Development evaluation methods were explored in CoP programmes in three organizations and it would be useful study their use to a wider range of organizational contexts. Although action research allows the methods to be tried out in real situations, the involvement of the academic researcher and peers from other organizations inevitably influences their implementation. Support was available to deal with issues of understanding and sharing practices extended the skills and confidence of the participants. Further research is needed to determine the support needed by knowledge managers outside of an action research project so they can adopt and apply these approaches to evaluate their CoP programmes in a way which is sufficiently rigorous to provide meaningful insights.

7. Conclusion

The contribution of this research has been to extend understanding of the use of developmental evaluation approaches to support and develop organisational CoP programmes during periods of change and transition. This research found that developmental evaluation promoted a constructive dialogue between the KM team and community leaders about improvement and support needs in response to the changes. The participants noted that a developmental and learning orientation motivated people to be involved, more so than a judging or auditing approach, resulting in a positive intention to work together to put the recommendations into practice. Tailored approaches worked most effectively with the language and practices of the organization being taken into account in judging how to frame and implement all the developmental evaluation activities.

Developmental evaluation is a mind-set as much as a set of methods. It involves politically sensitive inclusive participation, a learning orientation and critical thinking and questioning skills. The knowledge managers demonstrated these capacities and skills, though it is acknowledged that action research provided them with support. This paper has argued that embedding developmental evaluation principles within CoP programmes constructively promotes the very benefits being sought from communities of practice – the development of a learning organization. However, embedding developmental evaluation principles into CoP programmes on an ongoing basis means knowledge managers also need to be able to develop the capacity of more individuals and groups to ask evaluative questions and critically reflect on their experience in participating in or leading CoPs (Cousins et al., 2012). Building organizational capability in line with these principles is already part of many knowledge management programmes through well-established practices such as after action reviews, peer assists and indeed communities of practice themselves (see for example Collison and Parcell, 2004 for an overview of these KM practices). While these stimulate dialogue about what is and is not working, meaningful evaluation also involves questioning assumptions about why the activity is being undertaken and how things could be improved. Knowledge managers may need to coach facilitators to prompt more challenging questioning and deeper reflection.

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