
DoVIEW PILOT

SUMMARY OF STAGE ONE EVALUATION FINDINGS



A pilot to test the usefulness and ease of implementing a software tool to assist strategic outcomes work in non-governmental organisations (NGOs) is being undertaken. Five organisations were trained in a one day workshop by Paul Duignan on how to use a software tool called DoView in December 2010. The training was intended to provide the NGOs with the tool to support the systematic implementation of outcomes data collection and its use in these organisations. In this case, outcomes data includes information that demonstrates whether or not the organisation has made a difference to people who use their services.

The five NGOs agreed to take part in a two stage evaluation to assess uptake and usefulness of the DoView tool in their organisations following the training. The first stage of the evaluation took place at five months post-training and explored early implementation of DoView and the results are reported here. A second stage to the evaluation will take place at month eleven post-training and will be reported then.

This evaluation assesses the extent DoView supports the development and application of outcome-based planning for NGO's (Phillipa Gaines, 2010).

The desired outcomes arising from the DoView workshop stated in the project plan were:

- Assessing the utility of DoView to support NGO's to develop an outcomes-focused system.
- Identifying key enablers for effective development and implementation of an outcomes-focused approach.
- Assessing efficiency gains for the organisation as a result of implementing DoView.
- Highlighting factors important for sustainable outcomes collection and use.
- Monitoring whether a community of practice develops among participating NGO's (Phillipa Gaines, 2010).

BACKGROUND

DoView is a software tool used to create outcomes models and program logic models that provide a strategic framework for organisations or programmes that are linked with outcomes. Traditionally, strategic planning has been done by holding a series of meetings and then producing a written multi-page text-and-table strategic plan. In comparison to the text-and-table approach, DoView uses a visual model (akin to a horizontal flow chart), to graphically capture the different stages of the strategic planning process (Paul Duignan, 2010). The developer of DoView proposes that this visual model approach is faster to create and makes it easier for people to understand the link between their organisation's strategy and outcomes. Using DoView's visual model to identify the organisations strategic objectives and then link outcomes to them is thought to provide a simple and efficient way for NGO's to establish, track and communicate outcomes systematically. Possible benefits include: streamlining processes for determining and measuring outcomes; reducing time spent on strategic planning; and integrating various organisational activities. Further information about the software can be found at www.doview.com.

METHODS

The evaluation utilised a developmental evaluation approach. See table below for outline of developmental evaluation principles and how they differ from traditional evaluation approaches.

Table One: *Comparing traditional evaluations with developmental evaluations*

Traditional evaluation	Developmental evaluation
Render definitive judgments of success or failure	Provide feedback, generate learnings, support direction or affirm changes in direction
Measure success against predetermined goals	Develop new measures and monitoring mechanisms as

	goals emerge & evolve
Position the evaluator outside to assure independence and objectivity	Position evaluation as a partnership. Team function integrated into action and ongoing interpretive processes
Design the evaluation based on linear cause-effect logic models	Design the evaluation to capture system dynamics, interdependencies, and emergent interconnections
Aim to produce generalisable findings across time and space	Aim to produce context-specific understandings that inform ongoing innovation
Accountability focused on and directed to external authorities and funders	Accountability centered on the innovators' deep sense of fundamental values and commitments
Accountability to control and locate blame for failures	Learning to respond to lack of control and stay in touch with what's unfolding and thereby respond strategically
Evaluator controls the evaluation and determines the design. Based on the evaluator's perspective on what is important	Evaluator collaborates in the change effort to design a process that matches philosophically and organisationally.
Evaluation engenders fear of failure.	Evaluation supports hunger for learning

From: Evaluation for the way we work, Michael Quinn Patton, Nonprofit Quarterly, Spring 2006, page 30.

The first phase of the evaluation of the DoView pilot was conducted five months after the workshop. Qualitative data was collected using semi-structured interviews with five representatives from four of the participating NGO's. The fifth workshop participant did not complete the interview. All interviews were audio-recorded and analysed for key themes.

A teleconference held on the 2nd June 2011 offered interviewees the opportunity to provide feedback about the emergent themes and to discuss the future of DoView within their organisation. Chaired by Phillipa Gaines, the teleconference was attended by Jane Vanderpyl and Lil Convery from Te Pou, along with representatives from two of the NGO's. A third representative unable to attend the session provided feedback to Te Pou following the teleconference.

Findings documented in the next section are the product of both the semi-structured interview data and discussions occurring on the 2nd of June.

FINDINGS

A. PERCEIVED VALUE OF DOVIEW AS A TOOL TO ASSIST DEVELOPING AN OUTCOMES FRAMEWORK

All participants viewed DoView positively. The main value and strengths of using DoView included:

- Easy to use, visually appealing
- Effective way to document processes and systems, a diverse range of applications
- Identify gaps in current data collection practices in the organisations, and to establish what data needs to be collected
- A one page summary of the strategic framework with outcomes to communicate more effectively with planners/funders, other stakeholders and workforce

First of all it can put somebody's vision on paper so that they can get everybody else on board with it and help in a visual way to get people to understand what is happening. But secondly it is a tool for thinking so I think that it can actually help literally for you to map out a business process and assist you in your thinking to get to the end game in

a less traditional way, but a much more pragmatic way than the sorts of business planning that we are doing at the moment.

The most tangible thing is a person coming back and saying “thanks for that, I now understand what you are doing”. And that’s good, that’s great we are happy with that.

- The tool would support strategic planning, reporting and auditing. Align planning with funders’ priorities
It kind of said to funders and planners we’re seriously thinking about your priorities and we’re making sure that the things that we’re focussing on match your priorities.
- The tool captures brainstorming around planning as it occurs
- It included as a component of training modules (used as a flow charting tool)
- It improved awareness/thinking around being outcomes focused for some, while others felt a good understanding existed prior to the DoView workshop

All NGO’s need to be outcomes focused because that’s what we’ve been asked for in our process. So any tool that’s going to assist that process it’s going to be a benefit them. And I think this tool, if it was able to be the least expensive way of doing something, which it’s not really expensive, then it’s a good start.

B. EXTENT OF USE OF DOVIEW SINCE THE WORKSHOP IN DECEMBER 2010

All four organisations indicated that they have not used DoView widely in their organisations. Although each organisation described unique reasons for this, the following factors were identified:

- There was a disconnect between learning the theory and applying DoView to own projects
- There was a lack of time and competing demands, resulting in sporadic use and needing to re-visit skills; timing in regards to other planning activities
- Although the tool itself was described as simple, the shift in actual practice and in thinking processes were found to be more complex and lengthy than anticipated
- Technical issues and low confidence around technical knowledge was an issue. Specific concerns include the loss of linkages when models are printed; proficiency with using short-cuts; inclusion of a time-line; colour schemes and fonts which enable branding to one’s organisation; and compatibility of DoView with existing software

C. TRAINING AND SUPPORT

Overall participants enjoyed the workshop and appreciated the support that had been provided. However a number of areas for improvement were apparent.

- The workshop was enjoyable and provided an easy-to-follow overview. It was helpful to use a populated model and an example specific to mental health, but there was a need for more focus on individual project work related to their organisation

It was good, it was fun, it was interactive and you came away with your head sort of bubbling with lots of ideas. But then taking it to a next step, it’s like everything isn’t it. I mean, what do you do with it? How do you go to the next step and what makes you sort of go ahead and engage with this model over others?

It probably needed to be a couple of days, maybe three, so you could actually go away that night enthused about it, and see where you could perhaps use that in a project that you might have going on. ...Then bring that back in and have another day around how to implement it.

- Facilitator very knowledgeable, but can be hard for an expert user to communicate their knowledge to others with minimal background

While he's kind of an expert user if you will, none of the audience are expert users and it's the first time they've been introduced to it. So I think sometimes there can be a disconnect between the person who's really really familiar and keen on the software and getting across to the potential end users how it operates.

- Valued regular updates from Phillipa and Paul. The participants suggested that an external person driving the process and supporting implementation in individual organisations was essential
- The Community of Practice did not develop. Two organisations felt it would be helpful to talk with organisations successfully using DoView, while others considered it a potential burden on time that would not add significant value to applying DoView

CONCLUSION

Firm conclusions about the effectiveness of DoView cannot be made at this stage of the evaluation. A clear consensus exists that for the full potential of DoView to be realised in organisations more intensive training and support are essential.

EFFECTIVENESS: to date, the effectiveness of DoView for supporting an outcomes system has been limited. Advancing the potential DoView may be achieved with additional implementation support, both before the pilot project finishes and for future organisations seeking to implement the tool.

RELEVANCE: DoView was perceived as relevant to the work of each NGO. Greater information and personalised feedback to facilitate alignment of DoView with existing practices and tools could enhance further relevancy. DoView appears to have applications wider than strategic planning, and therefore may be of greater relevance and usefulness than initially expected.

COST/BENEFIT: DoView was considered a cost-effective tool, but limited use of the software does not permit definite conclusions to be drawn. When considering the affordability and feasibility of more intensive support, the opportunity cost of not providing NGO's with adequate support to implement the tool must be acknowledged. The potential of DoView for creating an effective outcomes framework was considered by participants as an investment worthy of additional time and resources.

SUSTAINABILITY: good support exists for the on-going and/or future use of DoView in each of the four organisations. Additional implementation support and organisational wider buy-in emerged as key enablers needed to facilitate the on-going use of DoView.

The following table summarises progress toward meeting the primary outcomes of the DoView pilot:

RATING	EFFECTIVENESS	RELEVANCE	COST/BENEFIT	SUSTAINABLE
Excellent				
Very Good				
Good				
Adequate				
Poor				

The following table indicates perceived value and potential of DoView with adequate implementation support:

RATING	EFFECTIVENESS	RELEVANCE	COST/BENEFIT	SUSTAINABLE
Excellent				
Very Good				

Good				
Adequate				
Poor				

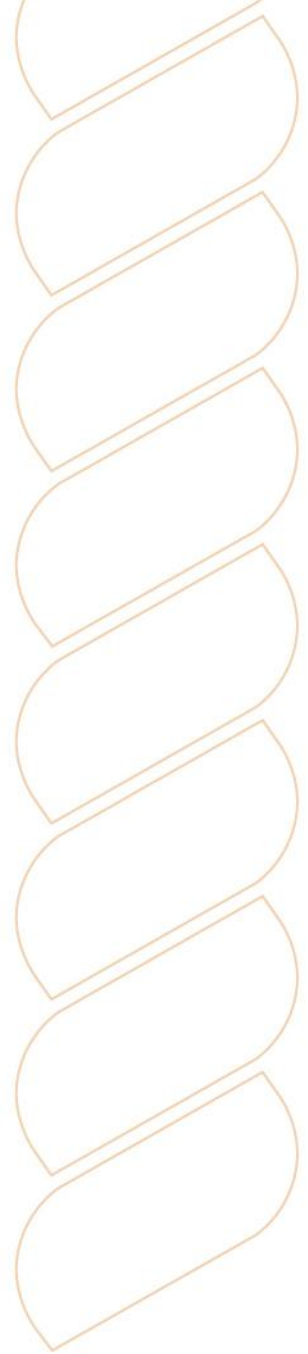
RECOMMENDATIONS

IMPROVEMENTS TO THE WORKSHOP

1. Provide information prior to the workshop, potentially as an online pre-workshop module or video clip emailed to attendees which introduces the conceptual background of DoView.
2. Allocate more time in the workshop for participants to populate their own data into a DoView model and ensure each participant has the opportunity to receive individualised feedback.
3. Time should be allocated for discussing how DoView can be aligned with other tools or systems which organisations may be using concurrently.
4. Allocate more time to up-skilling participants about the technical features of DoView.
5. Enable participants to follow the use of DoView throughout the workshop on a laptop loaded with a trial version of the software.
6. Future workshops should be longer. Three days is proposed, potentially structured as an initial two-day workshop covering conceptual background and practical application of DoView, and followed by a third session at a later date during which implementation issues are addressed.

ON-GOING SUPPORT

7. Offer an on-going mentoring process with an expert user.
8. Establish a dedicated workgroup within the organisation to drive the implementation of DoView, at the same as taking a collective approach by garnering the buy-in of the wider organisation.
9. Hold a follow-up workshop or meeting prior to the end of the pilot project. The focus should build on experiences to date and on supporting the development of DoView models using each NGO's own project data.



AUCKLAND

Level 2, 8 Nugent Street (B), Grafton
PO Box 108-244, Symonds Street
Auckland 1150, NEW ZEALAND
T +64 (9) 373 2125 F +64 (9) 373 2127

HAMILTON

293 Grey Street, Hamilton East
PO Box 219, Waikato Mail Centre
Hamilton 3240, NEW ZEALAND
T +64 (7) 857 1202 F +64 (7) 857 1297

WELLINGTON

Level 3, 147 Tory Street
PO Box 6169, Marion Square
Wellington 6141, NEW ZEALAND
T +64 (4) 237 6424 F +64 (4) 238 2016

CHRISTCHURCH

21 Birmingham Drive, Middleton
PO Box 22105, High Street,
Christchurch 8142, NEW ZEALAND
T +64 (3) 339 3782 F +64 (3) 339 3783