

Revaluation: a participative approach to measuring and making change

A CECAN Evaluation and Policy Practice Note for policy analysts and evaluators



Revaluation is an innovative process for measuring the full value of activity in complex systems. It is a new approach, developed in the context of NHS Change Day 2015, a grassroots social movement for improving patient experience. The organisers of Change Day felt it was impossible to evaluate – based in part on having tried to do so in previous years – and framed the research task as one of “reimagining evaluation”. Revaluation has since been applied in diverse settings including work on the natural environment, encouraging physical activity, and family nursing. It is continuously being refined through practice. Revaluation is centrally concerned with revealing the value of an activity or intervention in a complex system. Rather than asking “what works”, its first question is “what is going on?” For this and other reasons, Revaluation has been described both as “a paradigm shift in evaluation” and “not evaluation”.

What are the main elements of Revaluation?

Revaluation is both a process for measuring change in complex systems, and for making change in those systems. Revaluation:

- Shortcuts the process by which the attributes of an intervention are found to be effective, in order that they can then be replicated elsewhere. Instead it evaluates in real time, helping those working in a system to understand their effectiveness as their action or intervention unfolds, in order to increase their impact.
- Can be used for both formative (developmental) and summative (impact) evaluations: wherever the question “what is the value of this activity?” is asked.
- Is experienced by those working in a system as a simple participative process involving three phases of activity: telling their stories about the intervention or system, translating those stories into items of data expressing pieces of value, then negotiating with other participants to reach a settled account of the overall value.
- Is a process that is responsive to context, and the resources of the system (including available time), and is thus different in each setting.
- Is intended to function as an extension of what participants are already doing, rather than an additional burden which feels apart from their work, and undertaken for someone else.

What key terms are used in Revaluation?

The central device of Revaluation is the 6 box grid for revealing value. This is introduced to actors at the start of the measurement process, and is used as a dashboard to summarise the kinds of value revealed by the end of the study. The main premise of Revaluation is that to develop a full account of the value in a system, we have to measure in three dimensions (the 3 Cs), each of which includes visible and invisible value, as shown below:

- **Calculate** involves presenting quantitative outputs and outcomes; and manipulating numbers (summing, or converting using proxy data and multipliers) to arrive at a single figure, usually in £s. The dominant metric in orthodox evaluation.
- **Calibrate** involves qualitative judgements about the relative merits (or cost/benefits) of different actions and outcomes. Based on how actors decide where to direct their efforts (and how much effort to make), both as individual decision making and socialised in groups.
- **Capacitate** involves measuring the characteristics and capacity of a movement or network, plus the potential of that network to increase its capacity in future, and thus the value it can generate (ie its emergent qualities). Included here are relational data, exploring the connections in a network including in space (eg maps) and time (eg calendars).

In each of these dimensions, Revaluation explores both visible and invisible value:

- *Visible value* is based on known data, that which is observed in a system and already collected (at least in some parts of the system). As such, visible value tends to relate to changes past. It can also be considered as direct value: intended impacts and outcomes, in line with the objectives of an intervention.
- *Invisible value* is based on knowable data, which could be gathered and generated if actors or commissioners were interested in doing so. A simple example is Return on Investment data, in which wider outcomes are monetised (eg using proxy multipliers) to make their £ value visible. By extension, invisible value is also that which is hidden by actors (in systems where their work is not supported by commissioners) or which is indirect: not in line with (or unforeseen by) the intended outcomes of the intervention as commissioned. Value which cannot be observed at present, but is likely to emerge from the system in future, should also be considered here.

	VISIBLE	INVISIBLE
CALCULATE		
CALIBRATE		
CAPACITATE		

EXAMPLE

The evaluation of Grapevine/Coventry City Council's *Good to Go* (2017)

Good to Go is a portfolio of activities designed and led by community members in Coventry, including those with disabilities and other long-term conditions, co-ordinated by Grapevine, a charity which works with and in communities, "enabling people to connect positively with other community members so that their vulnerability reduces and their ability to cope with problems or respond to opportunities improves". It has been funded over two years by the Public Health team at Coventry City Council with the explicit aim of encouraging the less active and inactive to get involved in physical activity. However, the benefits which participants gain from the activities are far wider and deeper than the personal health benefits of increased physical activity alone.

The Revaluation process for *Good to Go* moved through four phases:

1 | Familiarise

Visits to all 5 activities ("subsystems")

Interviews (phone; f2f)

"Deep Stories" told by actors (plus reference costs)

2 | Iterate

Portfolios, exhibits, social listening, network mapping

3 | Socialise

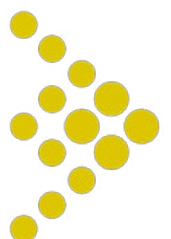
Socialising Solutions event, to negotiate value among the actors

Socialised Debrief, to agree learnings from the activity and the Revaluation process

4 | Report

Stakeholder Debrief, opening up the findings to funders, partners and wider stakeholders

Outputs: a Full Value report, and a Wider Learnings report



The Revaluation process resulted in a completed 6 box solution for *Good to Go*, in which the evidence of impacts and learnings was distributed across the six boxes. Highlights across each of the 3Cs of value included:

- **Calculate**

Good to Go overdelivered on its target: 1,303 inactive people became active, including 593 with disabilities. It also generated considerable £ value: for instance, volunteering time in Year 2 was worth £44k (nearly the total Year 2 budget). Even more significant sums were saved through the work by preventing participants from depending on statutory services.

- **Calibrate**

Mothers told how *Good to Go* activities had given them respite from caring responsibilities, while their children made friends with one another. For many mothers, respite led to recovery, and then resilience: some are now back in employment (with further personal, and associated £ value, benefits).

- **Capacitate**

The Revaluation shows how *Good to Go* has built new working relationships which span the voluntary/statutory services boundary. Grapevine's ways of working have come to the attention of NHS Commissioners, and the City Council – such that new models of co-designing and co-delivering services are being developed equally between these partners.

What are the characteristic features of Revaluation?

The data gathering – based on storing and iteration – and the analysis of that data – based on collective negotiation (as socialising) – is underpinned by specific design principles. These in turn derive from a diffuse interdisciplinary body of theory about how change happens in complex systems.

Evaluations in complex systems should observe these principles, and the implications which follow from them, which include:

- In a complex system there are multiple actors each pursuing different outcomes, based on multiple theories of how change happens (many tacit). Therefore, measure on multiple scales, and compare these.
- In a complex system the value is most evident at the lowest level of scale (though difficult to see from the top/centre). Hence those working in a system know best where the value is. Therefore, co-evaluate (the evaluator and evaluated are equal).
- All value is shared and social (even dominant and absolute-seeming measures of value, such as £ value, are the result of collective negotiation and trading). Therefore arrive at a settled account of value through negotiation ("socialise" around different accounts of value).
- Indirect value is always bigger than the direct (particularly where specific outcomes or objectives are pre-set, all the work required to achieve them will create more indirect value than the value of the targeted outcomes alone). Therefore the more you revalue, the more you reveal.

- Complex systems (so long as they are living) continue to change (including during and after the evaluation). Therefore our answers are contingent – we must produce open-ended iterations, with different answers every time.

Where can Revaluation be most usefully applied?

Revaluation is best suited to contexts in which complexity is acknowledged, such that "what is going on?" is recognised as a good opening question. When subsequent questions relate to the value of that activity (eg "what is good?", "what matters?", or "what is the best thing...?"), then Revaluation can help bring actors together to achieve shared outcomes. Associated attributes of such systems where Revaluation can most improve outcomes include:

- Living systems (ecosystems, but also socio-ecological or socio-technical systems).
- Social movements, or similar cause-driven collectives or communities of practice, where there is distributed leadership (ie no one is ostensibly in charge).
- Interventions or activities without pre-set outcomes (objective-free) or where one intervention is designed to produce multiple outcomes (some of which may not be pre-determined).
- Interventions which are explicitly scoped out as "more than" programmes.
- Activities or interventions in systems under stress (eg biodiversity, obesity) – where success involves transformation or paradigm change.
- The use of Revaluation away from bounded interventions is currently being explored, simply to explore where the value is in a complex system. This can amount to an organisational health check, to see how resilient a system (such as a business, school, or hospital) is, and what are likely to arise from it in future.

What advantages are there in using this method?

As a measurement system, the advantages of Revaluation relative to other evaluative approaches include:

- A fuller account of value is revealed (eg including indirect value).
- Participants define the outcomes they are working towards (and then negotiate around them).
- The answer appears more authentic to those working in the system (they can recognise themselves in the findings).
- The three dimensions of value are given equal prominence (number, story, and relational data are reported together; plus having the third dimension of Capacitate breaks the dichotomy between hard and soft data – where story invariably loses out to number).
- The quality of the relationships in a system is given special value (Capacitate is brought into view – it is the quality of the relationships in a system that give it its resilience, and its capacity to generate more change in future).

As a change process, the advantages of Revaluation include:

- The power of measurement to generate learning and self-knowledge is given back to the participants (rather than judgment being the property of the evaluators).
- The process fits into the day to day work of participants (by adding a layer of reflection onto their pre-existing courses of action); this overcomes the "burden of evaluation" as something conducted for the funder.
- Future change is highlighted alongside past change (for instance, in the Invisible aspects of value) – the emergent qualities of complex systems are foregrounded.

Does the method have disadvantages?

Disadvantages of the Revaluation process include that:

- Those working in a system must buy into the process (if they do not tell, and then iterate, their stories, then there are no data to work with).
- Commissioners need to see the process as valid – even as being as robust as other methods for evaluating in complex systems (a prerequisite of which is noticing that the system in question is complex, not linear).
- A great deal of data are generated (especially if participants iterate enthusiastically), which all need processing before they can be socialised.
- Revaluation tends not to make causal claims – given that it is more interested in "what is going on" than "what works".
- Revaluation holds that actors know best where the value is; quality of data (getting to the truth of what is going on) is more of a preoccupation than objectivity.

Where has Revaluation already been used?

Since its creation in 2015, Revaluation has been used in a wide range of complex systems, including:

- NHS Change Day 2015
- Welsh Government Nature Fund
- Derbyshire Sport Active 4 Life
- Family Nurse Partnership (Northern Ireland)
- NHS England / Leadership Centre A&E System Enabling
- NHS Leadership Academy/University of the West of England Building Leadership for Inclusion

Further information

Website: www.revaluation.org.uk

The full report on Grapevine Good to Go is available on request, and a journal paper on Revaluation is forthcoming in the Autumn.



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The Centre for the Evaluation of Complexity Across the Nexus (CECAN) is a £3m national research centre hosted by the University of Surrey, which brings together a unique coalition of experts to address some of the greatest issues in policy making and evaluation.

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