

CECAN Webinar:

Setting Boundaries in Evaluation; The role of Critical Systems Heuristics



Wednesday 18th October 2023, 10:00 – 11:00 BST

Presenter: Bob Williams

Welcome to our **CECAN Webinar**.

All participants are muted. Only the Presenter & CECAN Host can speak. The webinar will start at **10:00 BST**.

Bob will speak for around 45 minutes and will answer questions at the end.

Please submit your questions at any point during the webinar via the Q&A box in the Zoom webinar control panel.

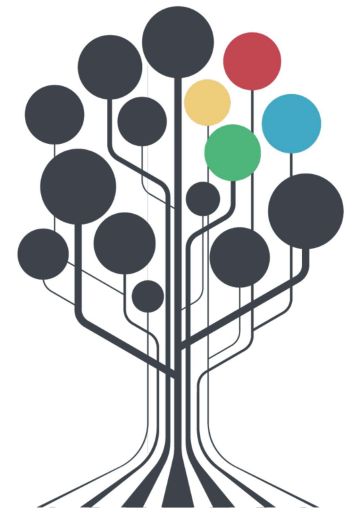
Today's webinar will be recorded and made available on the CECAN website.

E Mail: cecan@surrey.ac.uk

Web: www.cecan.ac.uk

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CRITICAL SYSTEMS HEURISTICS

AND

EVALUATION

BOB WILLIAMS
OCTOBER 2023

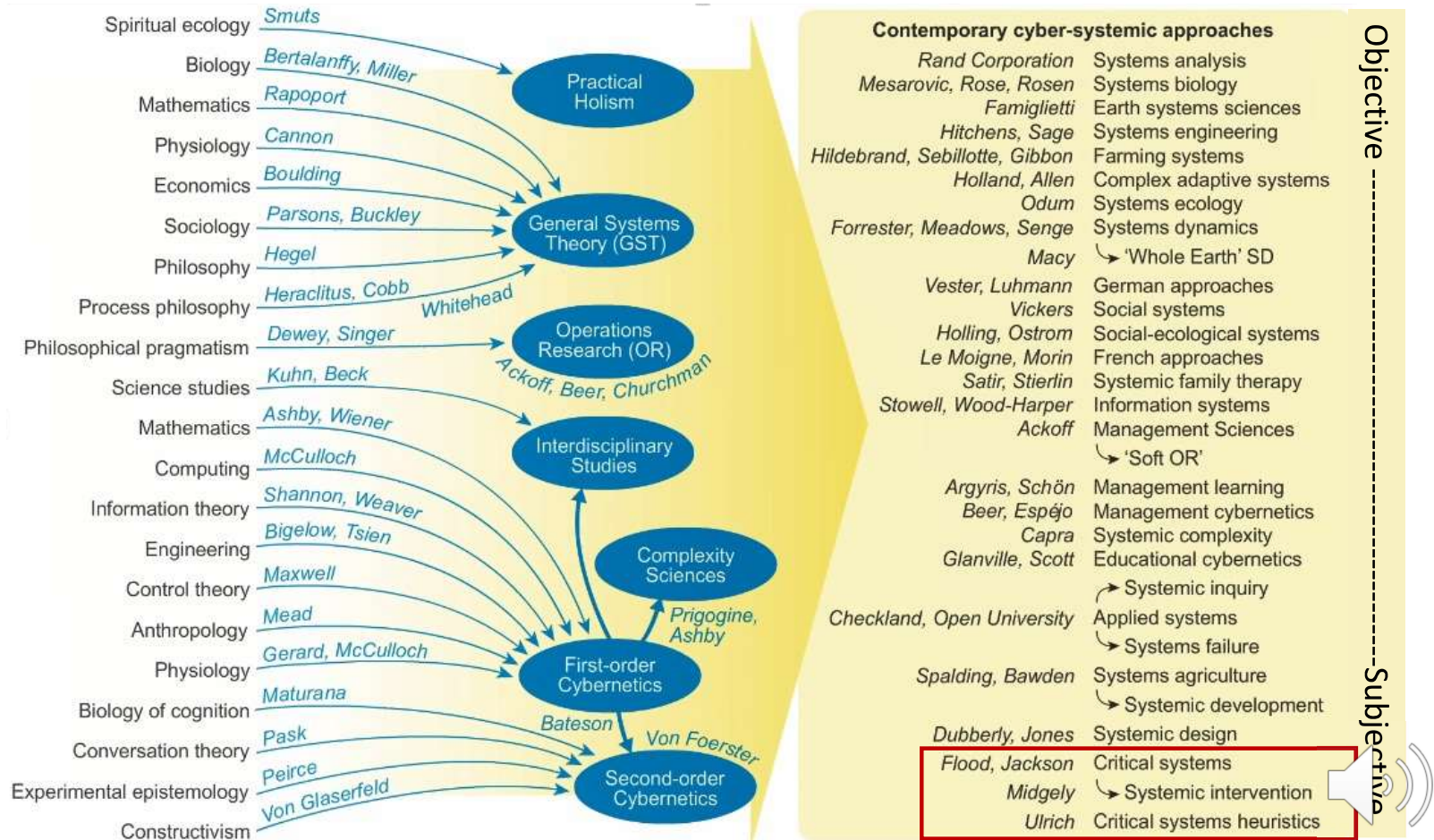
<http://www.bobwilliams.co.nz>

bob@bobwilliams.co.nz



The Systems Field

Ison, R. (2017). Systems Practice: How to Act



What is a System?

A SYSTEM IS

A collection of entities

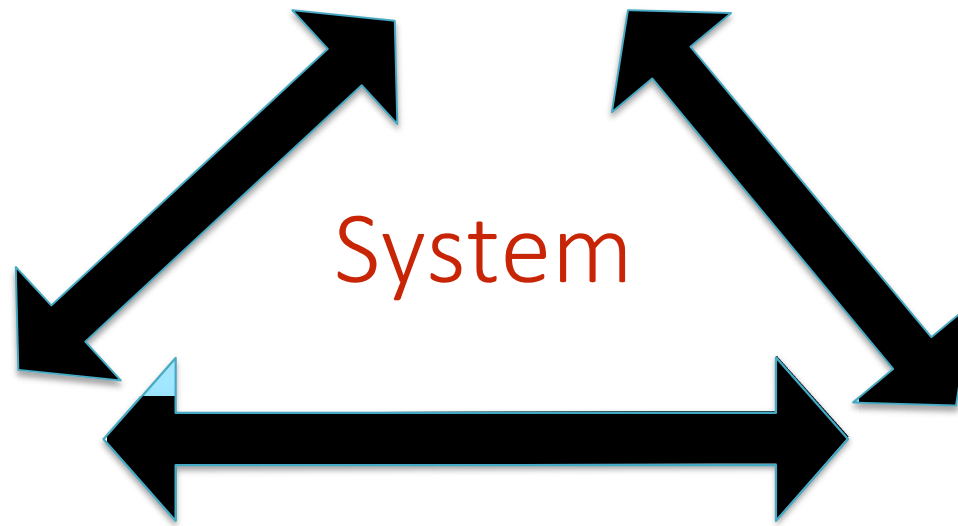
That are perceived by someone as interacting together

To achieve something



INTER-RELATIONSHIPS

A collection of entities interacting together



That are perceived by someone

PERSPECTIVES

To achieve something

BOUNDARIES



Understand INTER-RELATIONSHIPS

What is the reality we are dealing with?



How do people interpret reality?

Engage with PERSPECTIVES

What is desirable and feasible to do?

Decide on BOUNDARIES



Decide on BOUNDARIES

What is desirable and feasible to do?

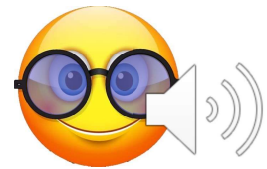
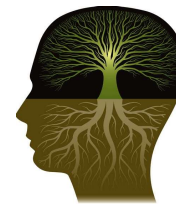
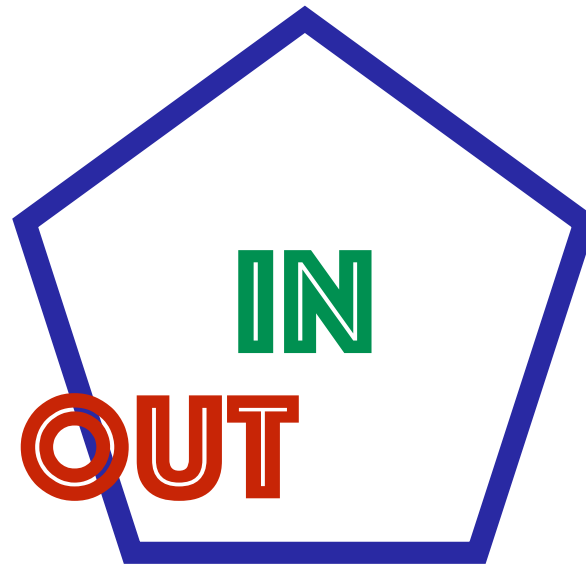


ON WHAT BASIS CAN YOU CLAIM
THAT THIS IS THE RIGHT THING TO DO?



Decide on BOUNDARIES

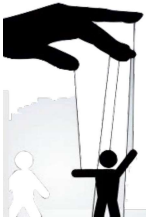
What is desirable and feasible to do?





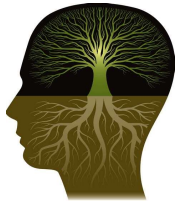
Purpose

Gain vs Loss



Control

Autonomy vs Control



Knowledge

Use vs Ignore



Legitimacy

Desirable vs Feasible





Legitimacy

Desirable vs Feasible



Who?

What?

So What?



Purpose

Benefit | Loss

Who?	What?	So What?
Benefits	Purposes	How will you know?
Who or what benefits from the intervention or evaluation and how?	What are the purposes of the intervention or evaluation?	What are the key measures of success of intervention or evaluation? What values underpin this measurement choice?
Who or what should benefit from the intervention or evaluation and how?	What should be the purposes of the intervention or evaluation?	What should be the key measures of success of intervention or evaluation? What values underpin this measurement choice?



Control

Autonomy | Control

Who?	What?	So What?
Decision Makers	Autonomy	Control
What components (resources, people, policies etc) are the responsibility of decision-makers?	Who or what have sufficient autonomy to make decisions about the use of components?	What is outside the autonomy of decision makers in order to ensure the benefits are realised? What values underpin this boundary decision?
What components (resources, people, policies etc) should be the responsibility of decision-makers?	Who or what should have sufficient autonomy to make decisions about the use of components?	What should be outside the control of decision makers in order to ensure that the benefits are realised? What values underpin this boundary decision?



Knowledge

Used | Ignored

Who?	What?	So What?
Experts	Expertise	Guarantee
Who are the experts who provide expertise?	What expertise informs decision making?	What are the means by which expertise is assessed as appropriate? What values underpin the choice between knowledge and expertise used and not used or marginalised?
Who or what should be the experts who provide that expertise?	What expertise should inform decision making?	What should be the means by which expertise is assessed as appropriate? What values should underpin the choice between knowledge and expertise used and not used or marginalised?



Legitimacy

Desirable | Feasible

Who?	What?	So What?
Victims	Loss	Feasibility
Who or what is negatively affected, marginalised or disadvantaged by the intervention or evaluation?	What is the response to interests that are negatively affected, marginalized or disadvantaged by the intervention or evaluation?	In order to sustain the benefits, what trade-offs are necessary and what values underpin a response to the positive and negative implications of the intervention or evaluation?
Who or what should be negatively affected, marginalised or disadvantaged by the intervention or evaluation?	What should be the response to interests that are negatively affected, marginalized or disadvantaged by the intervention or evaluation?	In order to sustain the benefits, what trade-offs should be necessary and what values should underpin the response to the positive and negative implications of the intervention or evaluation?



Decide on BOUNDARIES

What is desirable and feasible to do?



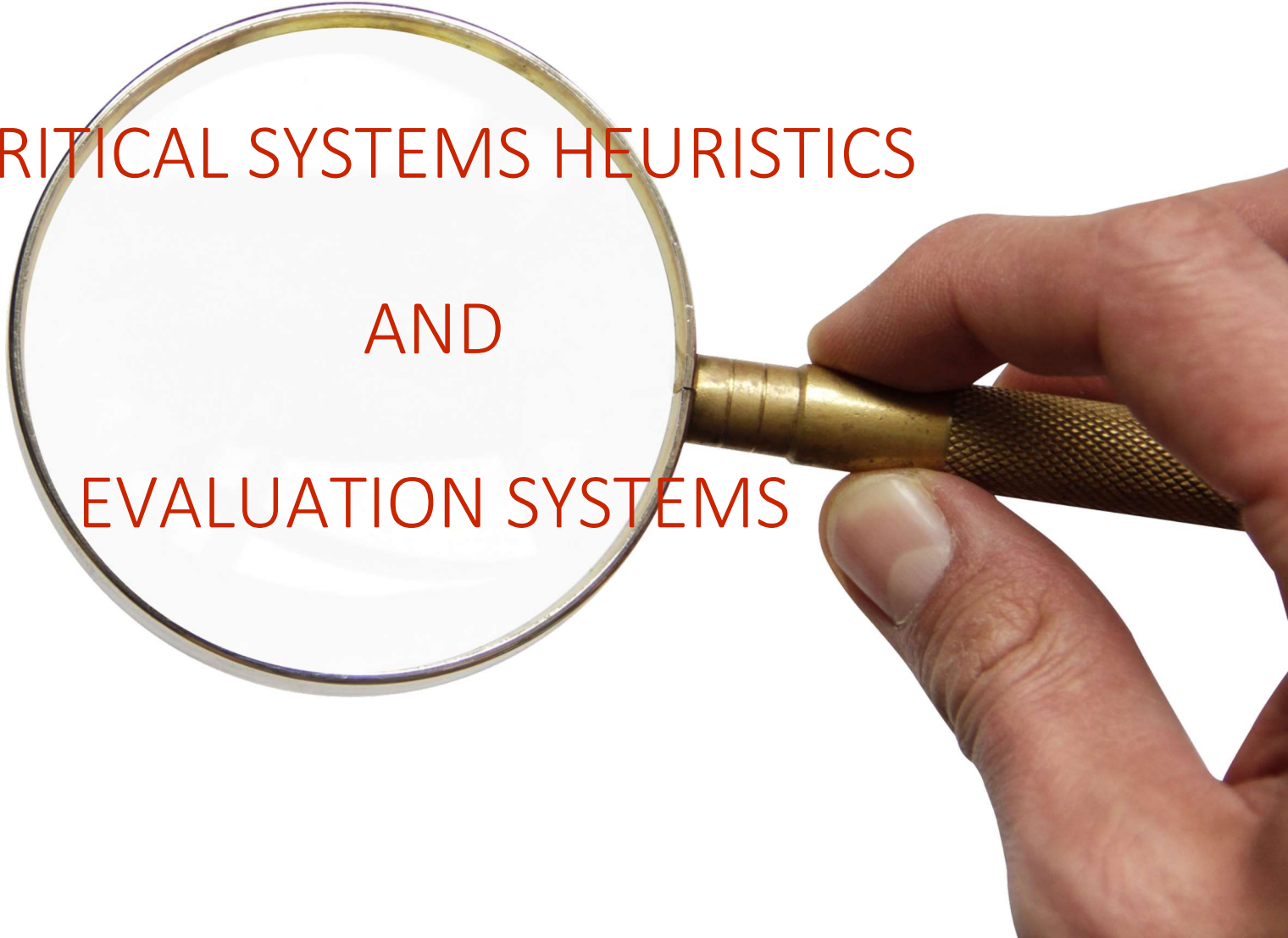
ON WHAT BASIS CAN YOU CLAIM
THAT THIS IS THE RIGHT THING TO DO?



TWO ISSUES



CRITICAL SYSTEMS HEURISTICS
AND
EVALUATION SYSTEMS



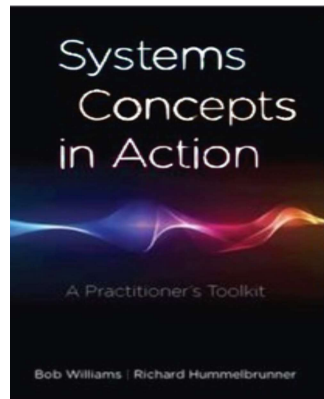


Systemic Evaluation Design

<https://gumroad.com/l/evaldesign>

A workbook that's a soup-to-nuts approach to applying systems ideas to evaluation design.

Now in it's Second Edition



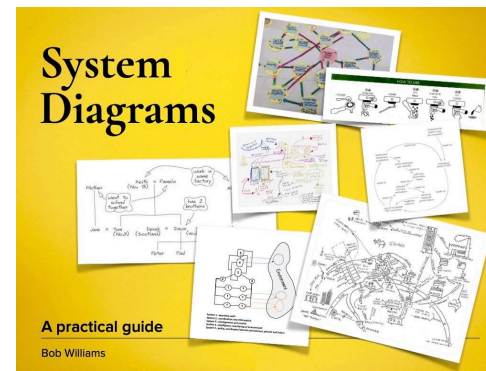
Systems Concepts in Action: A practitioners toolkit Bob Williams & Richard Hummelbrunner 2010

19 methods from various systems traditions structured in 3 sections:

- Describing and analysing situations
- Changing and managing situations
- Learning about situations

Systems Diagramming; A Practical Guide

<https://gumroad.com/l/systemdiagrams>



Six diagramming traditions with in the system field explained.



Wicked Solutions: A systems approach to complex problems Bob Williams & Sjon van 't Hoff 2016

www.gumroad.com/l/wicked

Designing an intervention using three systems concepts

- Inter-relationships
- Perspectives
- Boundaries

WHERE NEXT?

Be strategic. Start with an aspect of the systems field that interests you

Be careful. Using systems ideas could change your relationship with key colleagues and stakeholders

Be safe. Seek low risk, medium reward first.

Be useful. Use systems ideas when you think they would add something valuable to your research

Be creative. Don't be a purist; adapt, invent, modify but stick to the core principles

Have some fun

