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AES Systems Workshop

Thursday 10th December 2020, 10.00am to 4.30pm AEDT

Systems Evaluation Theory – Practice & Implementation Worksheet Blank



EVALUATION LEARNING

Systems Evaluation Theory – Practice & Implementation

presented by Ralph Renger, Lewis Atkinson, and Brian Keogh

Date and time: Thursday 10th December 2020, 10.00am to 4.30pm AEDT (registration from 9.45am)

Venue: Via Zoom. Details will be emailed to registrants just prior to the workshop start time

Facilitator: Ralph Renger, Lewis Atkinson and Brian Keogh

Workshop Overview

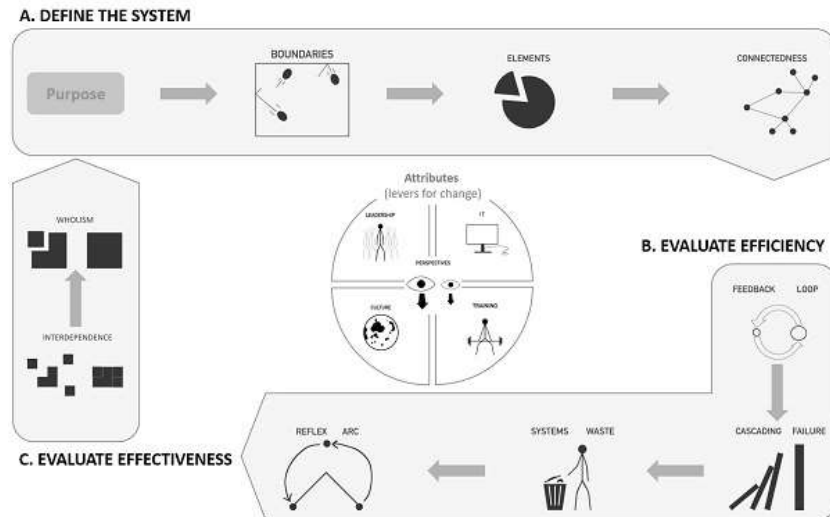
The practical application of systems thinking in a structured evaluation framework.

Workshop Content

Using contemporary COVID19 case study scenarios we will be facilitating participants in the following key principles of the methodology.

- **Phase A: Defining the system** – working through purpose, boundaries, elements and connectedness,
- **Phase B: Evaluating system efficiency** – identifying and assessing feedback loops, cascading failures, systems waste and reflex arcs,
- **Phase C: Evaluating system effectiveness** – understanding interdependence and wholism,
- **Phase D: Exploring and validating systems attributes as lever for system change** – culture, leadership, IT systems and training





The workshop will include breakout sessions demonstrating application of SET for systems diagnosis and framing recommendations for system improvements in efficiency & effectiveness. MURAL will be used during breakout room sessions.

There will be some pre-work materials required to be completed by participants in order to enhance the workshop experience. There will also be an opportunity to apply the learnings to their own work/project context.

Workshop Outcomes

- Understand what it means to think in terms of systems
- Understand when a systems approach is appropriate
- Understand how to use these systems principles to complete a diagnostic analysis of efficiency and effectiveness of any system

PL competencies

This workshop aligns with competencies in the [AES Evaluator’s Professional Learning Competency Framework](#). The identified domains are

- Domain 2 – Evaluation theory
- Domain 3 – Culture, stakeholders and context
- Domain 4 – Research methods and systematic inquiry
- Domain 6 – Interpersonal skills
- Domain 7 – Evaluation Activities

System Worksheet Q1-Q3: Take 5 min.



- On the top of your worksheet label the name of your system.
- Name the emergent system property.
- List the system elements.



1. Name of your system:
Uber Eats Case Study
2. The emergent system property:
Customer satisfaction
3. List the system elements:
 - a. **Customer**
 - b. **Transport**
 - c. **Restaurant**
 - d. **Bank**
 - e. **IT**

System Worksheet Q4-Q5 : Take 5 min



- Who would be the leaders you would engage to define the emergent system property?
- Are there any system elements missing that are needed to contribute the emergent system property?



4. List the leaders/decision-makers that you need to bring to the table?
 - a. Customer
 - b. Driver
 - c. Restaurant owner
 - d. Bank
 - e. IT Consultant
5. Now using the emergent system property as a frame of reference revisit Number 3. Are there any elements missing? If yes add them under Number 3.

Concern was raised with the IT to bank process

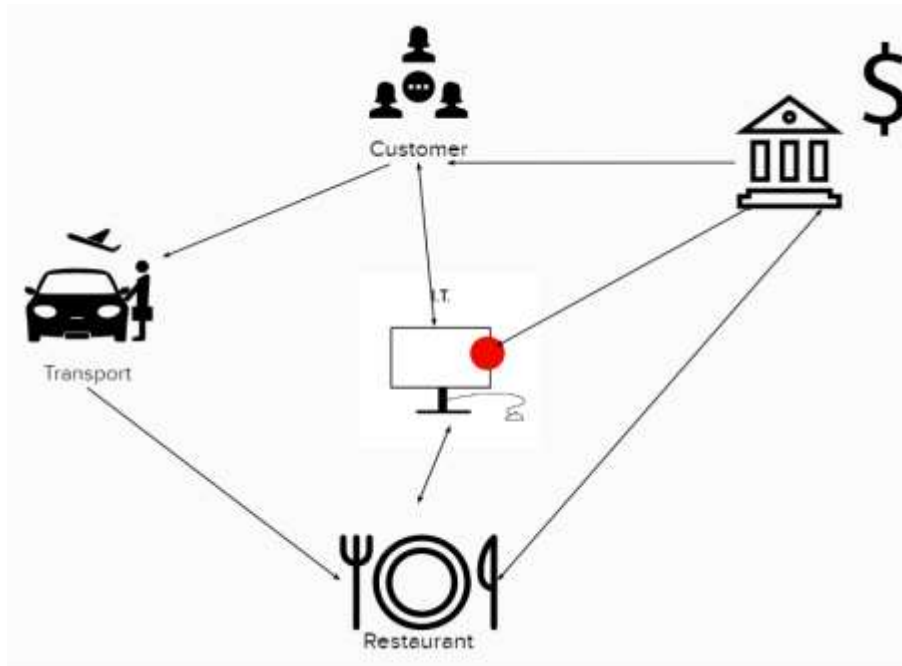
System Worksheet Q6: Take 5 min.



- Make each system element a box.
- Try and connect them to reflect their relationships.
- Lowe & Brian uber eats example:
 - Talk through system.
 - Element property.
 - Element you identified.
 - How they are connected.



6. Use the space below to draw out your system. Make each element a box. Connect the boxes that reflects how the elements are related to each other.



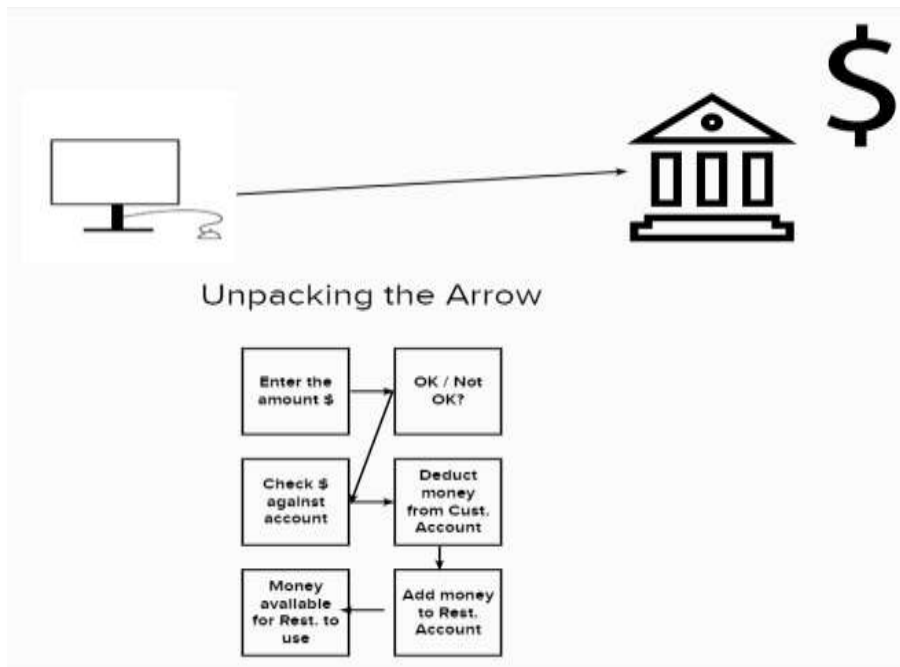
System Worksheet Q7: Take 5 min.



- Pick one of your connecting arrows between two system elements.
- Try and unpack the arrow: detail processes that might represent.
- Lewis and Brian illustrate



7. Select one connecting arrow between two of your boxes. Take a few minutes and try and unpack an arrow, that is detail the process that the arrow represents.



System Worksheet Q8 – Take 5 min.



- Thinking about your system, jot down where might you anticipate feedback loops?
- Between the seams of system elements
- Handoffs



FEEDBACK LOOP

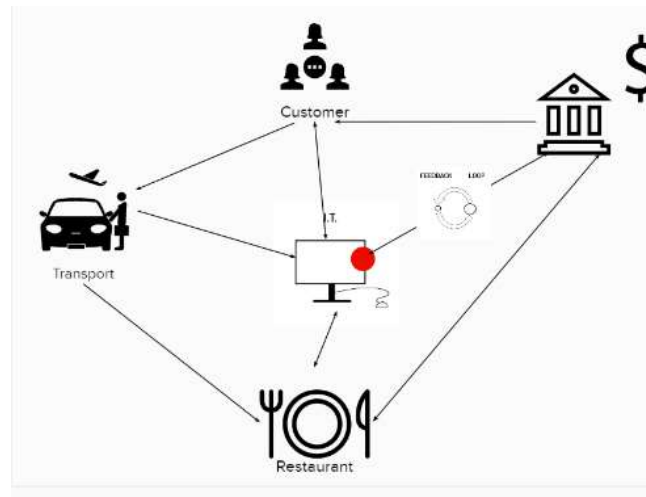


8. Revisit your diagrams under number 6 and 7. Use the feedback icon to denote possible feedback loops needing to be evaluated.

System Worksheet Q9 – Take 5 min.



- Thinking about your system, jot down where might you anticipate cascading failures?
- Where in the connections between elements might there be a bottleneck?




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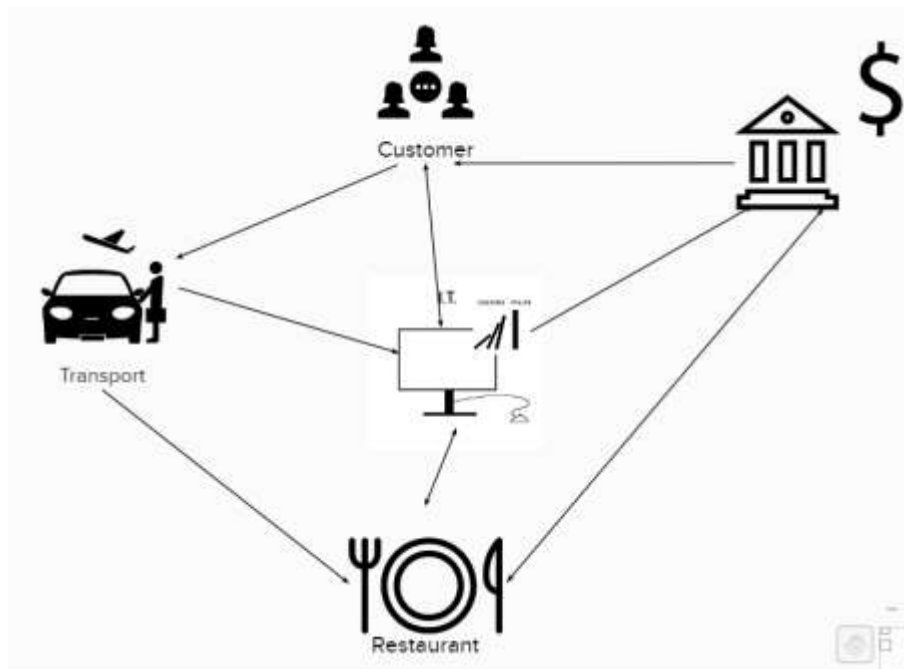
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9. Revisit your diagrams under number 6 and 7. Use the cascading failure icon  to denote possible trigger points for a series of failures.


System Worksheet Q10: Take 5 min.



• Thinking about your system, jot down where might you anticipate implementing a reflex arc?

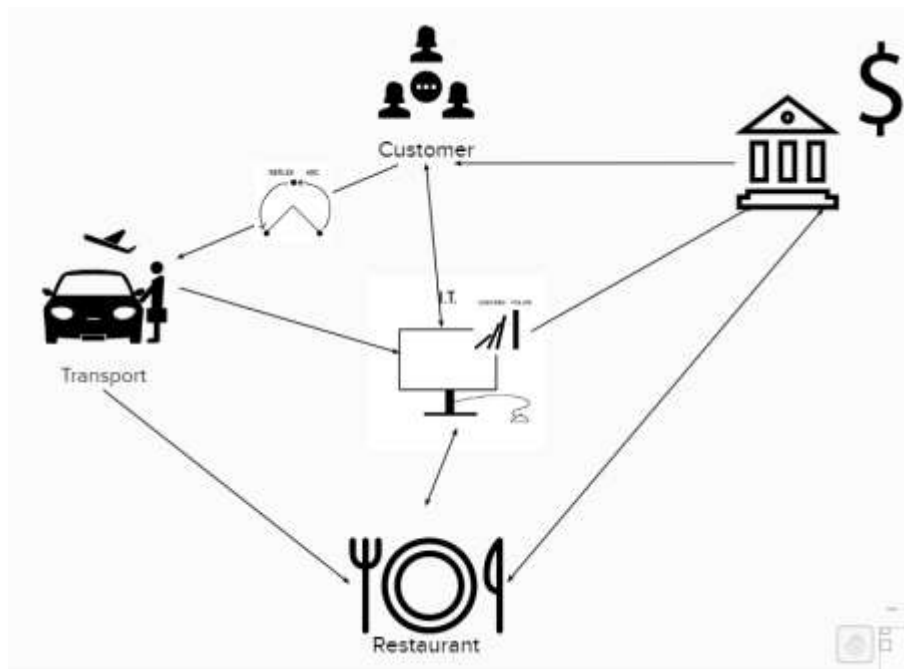



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10. Revisit your diagrams under number 6 and 7. Use the reflex arc icon  to denote possible places where a reflex arc might introduce an efficiency.

System Worksheet Q11: Take 5 min.

- Thinking about your system are their processes that are being repeated?
- Are these processes reflective of a needed feedback system?
- Are these processes unnecessary, e.g. a micromanager?



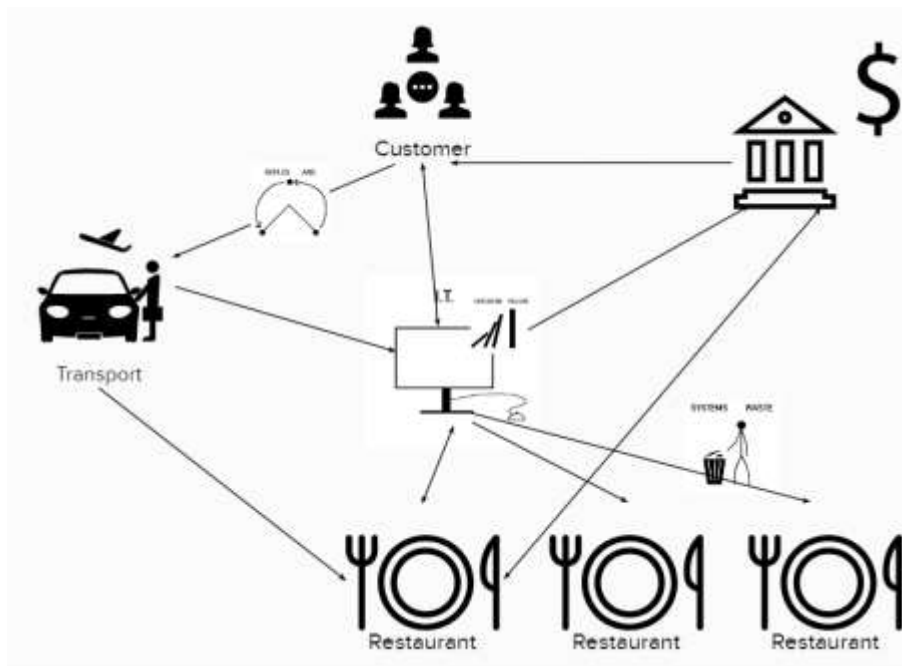
11. Revisit your diagrams under number 6 and 7. Use the system waste icon  to denote possible places where there might be unnecessary duplication of process.

System Worksheet Q12-Q13: Take 5 min.



* How might you evaluate your system's essential system property?

* List the data collection methods you might use to evaluate system efficiency (interdependence of system elements) and system effectiveness (emergence of your system's essential system property)



12. How might you evaluate your systems emergent system property?

A. Satisfaction rating using Likert scale. Net promoter score?

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13. List the data collection strategies you might use to evaluate:

- a. System efficiency:
 - i. **_Time from order to delivery arrival**
 - ii. **_Quality of meals**
 - iii. **_Number of 'risk' steps in the process**
 - iv. **_Many others**
- b. System effectiveness:
 - i. **_Customer satisfaction**
 - ii. **_Satisfaction over time**
 - iii. **_At a point in time focus points recognized as leading to customer satisfaction**

Where to next?

1. Workshop downloads available here:

- a. Link to slide deck: <https://www.justevaluation.com/aes-workshop-2020>
- b. Link to the completed worksheet Uber Eats example: <https://www.justevaluation.com/aes-workshop-2020>
- c. Link to Workshop Canvas on MURAL:
<https://app.mural.co/t/cobalt598490/m/cobalt598490/1604904778626/03d8368a56cb854535dc50a8d1cbb375fc70c528>

2. Contacts for further discussion and online consulting and training in-house for 2021:

- a. Brian Keogh – 0408 028 269 & briankeogh@me.com
- b. Lewe Atkinson – 0419 240 979 & lewis@hainescentreasia.com
- c. Ralph Renger - +1 520 203 1038 & ralph@justevaluation.com

3. 2020 Systems Thinking Concepts and COVID-19 workshop series:

- a. <https://www.justevaluation.com/copy-of-aea-workshop-2019-1>

4. More about systems thinking:

- a. <https://hainescentreaustralia.com.au/systems-evaluation-services/>
- b. <https://hainescentreaustralia.com.au/resources-books/>

5. Systems Thinking and Evaluation LinkedIn group <https://www.linkedin.com/groups/10508364/>



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