Prezentacije I-V: Bojan Radej, SDE

I CAUSAL MAPPING (CM)

**A causal map** (Axelrod, 1976; Powell, 2017)

🡪 is **a graphical tool** which crystallises **how people see causes and effects of changes** induced by intervention.

🡪 CM is already well known in evaluation: graphical representation of **theory of change**

**Methodology**:

🡪 First, **collect narratives** **with interviews about how** target beneficiaries **experienced change**

🡪 Next, **coding** – like keywording the collected texts in predetermined ways (depending on evaluated concerns). Codes enable analytical reading of text. For textual analysis of ‘**project effectiveness**’ evaluator would use codes such as 'success', 'relevance', ‘outcome’, 'effect', 'impacts,' ‘positive/negative’ and then analyse their relatedness.

🡪 Then **classification** of coded text with predetermined frame to reveal **causal chains**.

🡪 Followed by drawing **global causal map** that can zoom in (causal sub-maps) and zoom out (synthesis of many sub-maps)

🡪 The evaluator compares obtained findings with the commissioners’ theory of change – **reality check**.

**Stakeholders to draw conclusions** about how to proced.

II ARTIFICIAL INTELIGENCE BASED TOOLS (AI)

**Examples**: Google Translate, ChatGPT, Bard, or Bing.

In evaluation: AILYZE, Claude, Coda

**Why is AI so important in evaluation**?

* Eventhough we are said to live in **information society**, IBM estimates that **80% to 90% of data exists in an unstructured format**, which is usually not analyses, but wasted **(**such as spoken language**)**.
* **Participatory evaluation** creates a substantial volume of unstructured textual data
* Until recently, analysis of natural language (as it is spoken or written) was a **time-extensive** effort, limiting the volume of analytically examined text.

**How AI works**?

🡪 AI holds **mystical look**; AI models are not created only by linguist, mathematical, statistical rules but also by **voodoo** – ‘what works somehow’. ChatGPT. Hallucination of AI

AI is based on:

* **Large language models** (LLMs):
* **Each word is encoded** asa high-dimensional vector signifying its **potential applications**.
* And then generate a ‘coherent continuation’ of text, considering **probabilistic rules** that decide which new text is best fitting to a given context.
* **Natural language processing (NLP)** = it learns computer understanding of natural language.

LLM-NLP learns from **text corpora** (=trillions of web pages) to find out how things are connected or differed.

LLMsuse **NLP** **algorithms** that are classified into **three categories**:

* **Rules-based algorithms**

They generate textual content by employing sets of rules, such as dictionaries for translation purposes.

* **Machine learning-based algorithms**
* They use statistical techniques.
* These algorithms learn from past **successes and failures**.
* **Neural networks**, combines the first two.

These networks cultivate their own operational rules via iterative processing and iterative learning derived from previous outcomes.

**AILYZE** (MIT, AI Laboratory)

* LLM - NLP enable the comprehensive **analysis of written and spoken text**.
* Allows to upload documents and pose inquiries, e.g.:
	+ what are **variations in perspectives** among participants regarding X;
	+ the quantification of various **thematic aspects** of analysed text.

\*\*\*The aim of two short presentations is **to include CM and AI** in a discussion about **new generation of tools** for participatory evaluation.

So far we **learned about tools’ abilities** to **identify collective meaning** **from many diverse** participants’ evaluation of project intervention.

It is opportunity now to open **discussion about some questionable features** of new tools that may **constrain reach** of participatory evaluation.\*\*\*

III DISCUSSION ABOUT NEW TOOLS

How different tools of new generation contribute to **declared** **inclusiveness** and **rationality** (=what is best for all?)ofparticipatory evaluation?

**= This question** is asked in **analogy** with classical **collective choice problem** that needs to be addressed in **democratic** and **rational** way (Arrow), since:

* Democracy is based on Rationality / no Rationality without Democracy.
* = Inclusiveness without Collective good / Collective good without Inclusiveness.

One needs to **compare new tools** **depending on how satisfactory they resolve two** interrelated problems of Inclusive & Rational participatory evaluation:

* **Epistemic blindness** = a person is blinded from grasping complex things with many dissimilar explanations: **for instance**, economist may be epistemic blind for environmental arguments. 🡪 leads to **Bias** 🡪 **Exclusion**.
* **Aggregation problem:** from **micro to macro**, such as from many individual stories to overall conclusions in participatory evaluation 🡪 do aggregated results **really represent all different views collected** in participatory process?

III.1 Epistemic blindness in participatory evaluation

**New tools** recognise **various biases** that can take place inparticipatory evaluation:

* Confirmation bias(when one interprets information in a way that confirms one’s pre-existing beliefs),
* Social desirability bias,
* Selection bias,
* Reporting bias, ...

How to **deal with epistemic blindness** in participatory evaluation?:

1. **Double-blinding** (CM): blinding (field researcher; respondent) about certain essential information, such as what is the main goal of evaluation.

🡪 PROBLEMATICfrom the aspect of **inclusiveness**.

1. **Working backward** (MSC, CM, OH): evaluator first finds out what worked, and then works backward to figure out how it worked.

🡪 PROBLEM**:** complex intervention has numerous possible paths from beginning to end and it is even impossible to know all relevant steps 🡪 Working Backwards **is designed by majority**, it is one ofpreferredoptions not something **inevitable = Exclusion**.

OPINION: Working Backwards, Double Blinding method of overcoming biases are prone to **reinforce** the existing patterns of **social exclusion**

---III.2 Aggregation problem in participatory evaluation

**Different approaches** are available for the aggregation but they produce different results, **from more to less inclusive**.

* **Partial aggregation approach (**SM, CM, OH**)**. No more from **micro to macro** level but only from **micro to meso** level. Sub-aggregates such as domains, sectors, or themes, clusters.

🡪PROBLEM: **meso to macro phase** of aggregation **is missing in evaluation** (this phase of synthesis is left to stakeholders). This is why it cannot produce ‘simple answers to complex questions’ (**what is best for all)**. 🡪 Scriven wrote that rejection of summation in evaluation and leaving this task for decision-makers means “**letting the client down at exactly the moment they need you most**.”

* Or **‘One person – One voice’** (CM, MSC, SM). It assumes **the** **same common denominator** (unit of measurement) between all participants.

🡪 PROBLEMS:

* + - Should egoism and solidarity have the same voice in collective choice?
		- ‘One voice’ **assumes** decision-making with **majority** so it is **very excluding principle of synthesis.**
		- Imperative of inclusive participatory evaluation is preciselyabout **overcoming majority-**basedapproach to synthesis**.**

‘One voice’ is merely **broadening existing majority**, it does not abolish exclusion as a principle of synthesis. 🡪 emergence of **double excluded** – from old narrower majority and from new broader majority.

* Even more restrictive is ‘**summary by selection**’ (MSC). An approach that summarises the collected stories through the levels of existing authority within an organisation or program.

🡪 PROBLEM it removes many input stories from the aggregate = Produces considerable **waste** of collected stories = **Exclusion**:

* Even more restrictive is ‘**Facilitated synthesis**’ (OH) – only at the highest level of hierarchy. Evaluator becomes **facilitator of** **discussion among** stakeholders about how they can make sense and use of evaluation findings. 🡪 WB: **stakeholders evaluate, evaluators facilitate**. Evaluator becomes **invisible** force like a hidden hand.

🡪 PROBLEM: Why would one hire evaluator at all?

**??** Evaluator as **out-sourced is** now **in-sourcing** stakeholders to accomplish the final step in evaluation synthesis (meso to macro) ??

Elimination of evaluator **eliminates also integrative reasoning** in final phase of synthesis (meso to macro). Facilitated synthesis **narrows** discussion precisely when it should be **broadened** and **spontaneously open** (when stakeholders gain better understanding of each other) – see concept of ‘*secondness in thirdness*’ (C.S. Peirce) **–** especially for SM.

PROPOSAL FOR DISCUSSION: New tools for participatory evaluation:

* Are most **valuable for** answering rather **limited evaluation questions**. They are **not generic models** for framing participatory evaluation.
* Are **very constrained aggregation procedures** so they cannot become fully effective in provision of collective good.
* These are **support tools** that should not be used independently except in special cases, when their **scope is strictly limited**.

IV NERELEVANTNO JE RELEVANTNO (GeoERA)

Primer ponazori, kako **nekaj sprva nevidnega** (n.r.) po prehodu skozi evalvacijski postopek ne le **postane vidno**, ampak tudi vpliva na ugotovitve vrednotenja.

* Klasičen pogled na GeoERA, *result-based*: Vrednotenje **predpisanih kazalnikov učinkov** je dokazalo, da je krovni projekt opazno presegel zastavljene cilje v vseh ključnih kriterijih vrednotenja, v večini ožjih projektov kot tudi v vseh glavnih temah, najbolj pa ravno v tisti, ki je bila najbolj povezovalna. Naknadno vrednotenje je širši projekt kot celoto in po večini sestavin zaradi preseženih rezultatov ocenilo z oceno odlično.
* Mrežno vrednotenje:
* ERA-NET ne opredeli, kako **vrednotiti mreže** (razen linearno).
* Vrednotenje GeoERA uporabi **inovativen pristop** (mreže vrednotiti mrežno): **Vodje ožjih projektov** so v posebnem vprašalniku ocenili svoje prispevke k trem glavnim tematskim ciljem krovnega projekta. Podrobni odgovori (14 projektov x 19 kriterijev ocenjevanja) so bili agregirani v kvadratno evalvacijsko matriko 3˟3 (doseženi učinki izvedenih tematskih aktivnosti po treh vodilnih temah).

**Ugotovitve**: Od 25% do 100% možnih medtematskih učinkov (siva polja vMatriki) je ocenjenih kot nerelevantnih (n.r.).

**Matrika medtematskih povezav**, ki so ocenjene kot relevantne, % od števila ožjih projektov

|  |  |  |  |
| --- | --- | --- | --- |
|  | GeoEnergija | GeoVode | Surovine |
| GeoEnergija | 62 | 50 | 50 |
| GeoVode | 25 | 33 | 0 |
| Surovine | 50 | 0 | 100 |

Študija je zato posebej **analizirala ocene n.r**. = vrednotenje medtematskega sodelovanja 🡪 v projektih, izrecno posvečenih mreženju, n.r. ocene običajno vklopile rdeče luči alarma.

**Ugotovitve**. Za oceno n.r. obstajajo različni razlogi:

* V mrežah ni nujno **vse povezano z vsem** (n.r. res pomeni n.r.)
* Nekatere navzkrižne povezave **še niso razvite** (GeoERA je nova mreža)
* Obstaja interes za mreženje, vendar tudi **ovire**, npr.
* Administrativne (‘evropska projektna birokracija’).
* Materialne (zahtevala se je sudeležba pri financiranju projektov).
* Nezanimivost projekta GeoERA za nekatere možne partnerje.
* Obstaja povezanost med temami, ki pa je **vrednotenje ni odkrilo**.
* **Največkrat** pa gre pri ocenah n.r. za **nerazumevanje narave mrežnih povezav**

🡪 Posredne povezav ni mogoče odkriti s kriteriji za vrednotenje neposrednih povezav

🡪 Nekateri projekti delujejo **le za višji cilj** mreže, vertikalno, ne pa tudi horizontalno.

🡪 V mrežnih projektih **vedno obstajajo možnosti sodelovanja**.

**Sklep**. Vsi navedeni razlogi za n.r. ocene:

* **Akcijsko naravnane** ugotovitve. Vsaka nalaga delovanje v prid mreženja.
* Z analizo n.r. dobimo **nekaj iz nič**.

V. STRATEŠKO DELOVANJEV RAZMERAH VISOKE NEGOTOVOSTI

Izhodišče: **Kot družba smo se znašli v obdobju velike negotovosti, sredi transformacijske metakrize**: Izbruh **negotovosti, nevidnega**.

???Ali v radikalno negotovih razmerahše lahko držimo **vajeti** prihodnosti v svojih rokah, **razmišljamo o prihodnosti** in **delujemo strateško**???

ODGOVOR: **Odvisno** od načina razmišljanja (Stacey) 🡪 **Miselni preobrat** v kompleksnost **🡪** Med **Redom & Neredom** 🡪 O strateških vprašanjih je treba razmišljati **evalvacijsko**

Štiri teorije resnice – Stacey, Matrika strinjanja in gotovosti



**Načini razmišljanja** (po Staceyu)

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|   | **Temelji**  | **Značaj sprememb**  | **Pristop k strateškim izbiram**  | **Kdo najde strateške odgovore?** |
| **Enostavno**  | Gotovost (ve se kaj je kaj, vzrok-posledica) | Iz znanega v znano (CO2 emisijeznižatiza 30%) | Analitično  | Znanost |
| **Komplicirano**  | Gotovost (v posamičnem) | Iz znanega v znano, po delih (Nacionalni program varstva okolja) | Sistemsko | Organizacija, Birokratsko |
| **Kaotično** | Negotovost (npr. javno mnenje, borze, epidemija) | Iz neznanega v neznano (sprememba ekološke zavesti; zdravstvenih navad) | Konstruktivi-zem  | Participacija, Računski modeli |
| **Kompleksno**  | Gotovost & Negotovo | Znano & Neznano (TR) | Sredinsko  | Vrednotenje |

**Strateško = Kompleksno = Med Sistemskim (Vlada) in Participativnim (Civilna družba)**

**Torej, kako** obravnavati strateška vprašanja v kompleksnih razmerah?

Z **oscilacijo** med sistemsko (kompliciranim) & participativno (kaotično) obravnavo dilem, npr. skrajno poenostavljeno:

* Začnemo **sistemsko** (& analitično) z opredelitvijo strateških dilem.
* Nadaljujemo s **participacijskim** procesom, razprava o ustrezni opredelitvi problema, vključitvi izključenih, načinu reševanja...
* Nadaljujemo s **sistemsko** (& analitično) oceno najbolj izpostavljenih različic iz prejšnjega koraka.
* Zaključimo **participativno**, npr. s participativno z izbiro možnosti, ki je najbolj vključevalna in najbolj kolektivno racionalna za vse.

**= Vse veščine že obstajajo**, najboljše prakse povezati in posplošiti.

**Sklep**:

???Ali v radikalno negotovih razmerahše lahko držimo **vajeti** prihodnosti v svojih rokah, **delujemo strateško**???

* Lahko! Pravzaprav **šele v negotovih razmerah postane strateško delovanje** ključno
* **Strateška** presoja (z vizijo) je v temeljni negotovosti **postala evalvacijska** (ne več niti znanstvena, niti participativna) 🡪 Evalvator na stvari ne gleda več z očmi (znanstveno), ampak je **slepoviden**:
* Kot **netopir**.
* Kot **meditativna zavest**, ko je človek pozoren in se zaveda raznorodnih razlag stvari in se do njih **ne opredeli enoznačno, temveč slepovidno** (v pojmih ‘prazne sredine’): ni zaslepljen z vidnim, niti slep za nevidno.