STRATEGY EVALUATION

DOES IT HAVE TO BE THIS HARD?

David Stuart
Creative Australia

STRATEGIES ARE PLENTIFUL IN GOVERNMENT, PHILANTHROPY, BUSINESS, FOR-PURPOSE SECTORS

THEY ARTICULATE IMPORTANT OUTCOMES, A STRATEGY APPROACH & RELEVANT RESOURCES AND ACTIONS

STRATEGIES RARELY MENTION EVALUATION

APPROACHES TO EVALUATION ARE PLENTIFUL

EVALUATION APPROACHES ARTICULATE METHODS FOR DIVERSE EVALUANDS

EVALUATION APPROACHES RARELY NAME STRATEGY*

(*PROGRAM EVALUTION → SYSTEMS INFORMED)

STRATEGIES = COMMON

EVALUATION OF STRATEGIES = NOT COMMON

WHY ARE WE HERE?

A STRATEGY COORDINATES ALIGNED RESOURCES TOWARDS IMPORTANT OUTCOMES

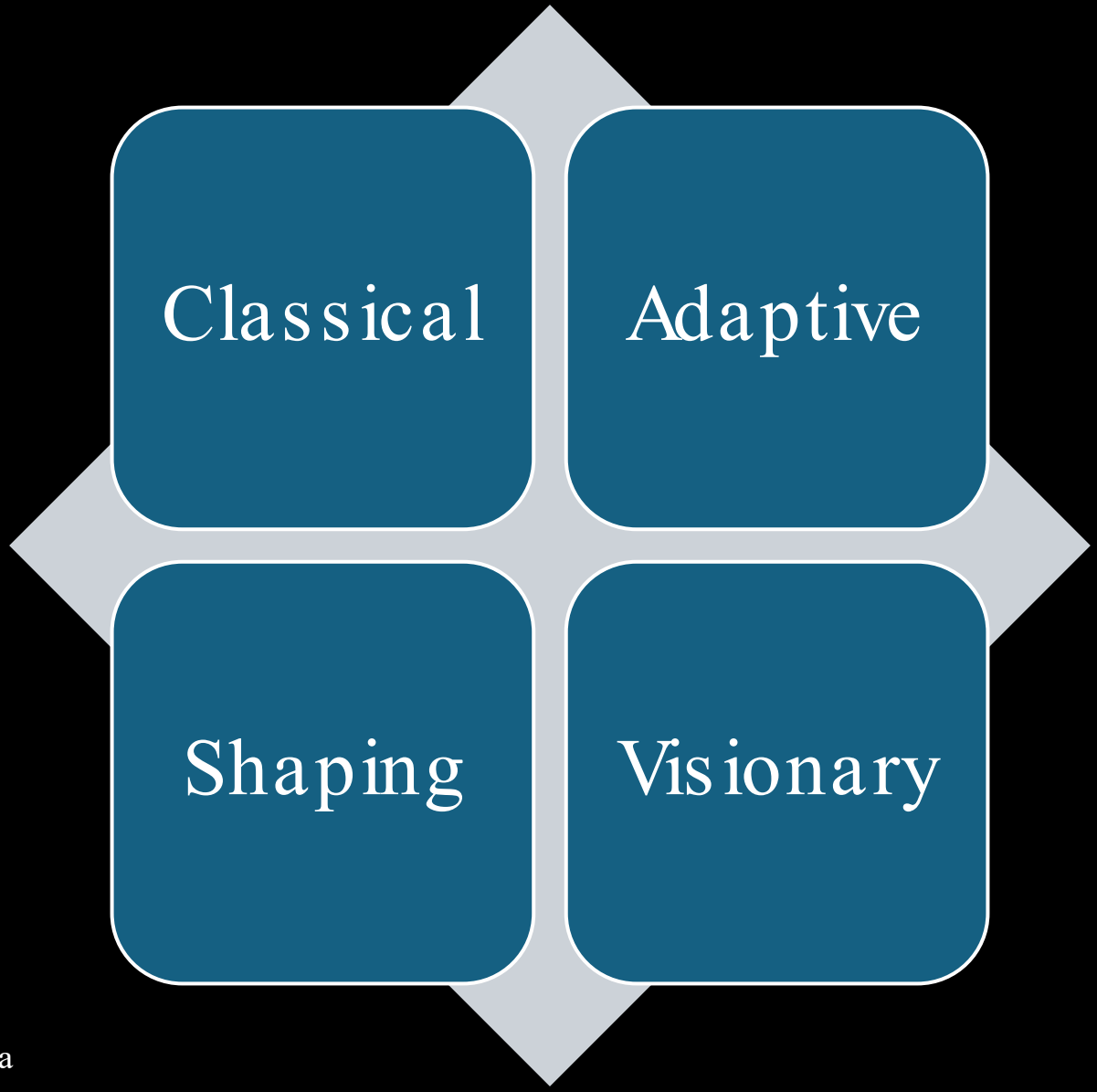


Low control over environment

Future is predictable

Future is unpredictable

High control over environment



Renewal

Reeves et al (2015) Your Strategy Needs a Strategy

A Classical strategy: evaluative focus on execution and resource alignment.

Adaptive strategy: evaluative focus on learning and adaptation, and realignment of resources.

Visionary strategy: evaluative focus on whether the big outcomes are plausible and worth pursuing.

Shaping strategy: evaluative focus on coordination: e.g. influence, coalition-building, network patterns.

Renewal strategy: evaluative focus on survival, recovery, sustainability.

A STRATEGY COORDINATES ALIGNED RESOURCES TOWARDS IMPORTANT OUTCOMES



A STRATEGY COORDINATES ALIGNED RESOURCES TOWARDS IMPORTANT OUTCOMES

Whole population

Demographic

Places

Social, health, environment outcomes

Organisation

Sector / industry

OUTCOMES

Aspirational

Long term

Challenging

IMPORTANT OUTCOMES

A STRATEGY COORDINATES ALIGNED RESOURCES TOWARDS IMPORTANT OUTCOMES

ALIGNED

Legitimacy

Fit with other resources

Contribution scale



Programs

Policy levers (e.g. regulation)

Government actors

Organisations

Relationships

Places

Infrastructure

Events

Research and evidence

A STRATEGY COORDINATES ALIGNED RESOURCES TOWARDS IMPORTANT OUTCOMES

COORDINATION

Governance

Leverage

Adaptive alignment

Resources alignment
New resources
Strategy as resource



Contribution to outcomes

STRATEGY vs PROGRAM EVALUATION

Evaluative dimension	Program evaluation	Strategy evaluation
Evaluand	A defined intervention/s	The alignment and coordination of resources towards important outcomes
Causal proposition	The intervention contributes to outcomes	Coordinated and aligned resources produce a stronger contribution to strategy outcomes than alternatives
Process	Was the intervention delivered appropriately?	Is the strategy coordinated appropriately? (governance, leverage, adaptable alignment)
Mechanisms	How did program features affect participants or settings?	How did alignment and coordination make the resources more effective?
Outcomes	Did intended program outcomes occur, for whom and under what conditions?	Did aligned and coordinated resources contribute materially to the important outcomes?

EASY RIGHT?

OUTCOMES CENTRED STRATEGY

Creative Australia

Monitoring of outcomes shifts

Monitoring resource implementation & outputs

Low alignment

Modest alignment & leverage functions

New Outcomes



RESOURCES CENTRED STRATEGY

New resources prominent

Alignment?

New resources management & monitoring (not strategy outcomes)

Selective program evaluation

Modest alignment & leverage functions

Broad outcomes



COORDINATION CENTRED STRATEGY

Few or no new resources

Strategy outcome setting / design

Resources monitoring and outcomes reporting

Adaptable alignment and leverage mechanisms lack teeth – no power shift

New/ refreshed outcomes



Despite the challenges…

We need more evaluative activity within strategies, exploring the contribution of aligned resources and coordination to important outcomes – i.e. the Strategy factor

Including asking good questions…

ASSESSING A STRATEGY

Evaluative dimension	Question
Strategy Evaluability	What is the strategy's causal proposition? Is there a defensible strategy theory of change? Are the outcomes ambitious, clear and time referenced? Are aligned resources credible to outcomes? Are coordination mechanisms explicit, resourced and able to influence resource presence, design and implementation?
Process and outcomes	Did aligned and coordinated resources significantly contribute to important outcomes? How have strategy mechanisms made resources more effective and strategy outcomes more likely?
Added-value	Value for Investment: Were the (strategy) contributions of coordination and aligned resources material?
Learning & Action	Do the strategy outcomes need to change? What new or strengthened coordination is required? Are the right resources still aligned? What coordinating mechanisms are weak or missing?

FINAL THOUGHTS

Strategies should enable shifts in important outcomes, through resource alignment and coordination

Evaluative design and practice has much to offer this strategy filled moment

Australian Government

david.stuart@creative.gov.au

David Stuart
Director Evaluation and Impact Measurement Creative Australia

Thank you

RESOURCES?

Strategy Palette developed by Martin Reeves, Knut Haanaes, and Janmejaya Sinha of the Boston Consulting Group (BCG) and the BCG Henderson Institute. It was popularised through their book Your Strategy Needs a Strategy (2015)

WHAT SHOULD STRATEGY EVALUATION DO?

A STRATEGY COORDINATES ALIGNED RESOURCES TOWARDS IMPORTANT OUTCOMES

POSITIONING IN ORGANISATIONS (Mintzberg)

Plan
Perspective
Position
Pattern

STRATEGY PALETTE (Reeves et al)

Classical
Adaptive
Visionary
Shaping
Renewal

PURPOSE/ OUTCOMES

Direction-setting
Policy reform
Sector development
Crisis response
System transformation



STRATEGY EVALUATION

Are the right resources strongly aligned to the strategy's important outcomes? – legitimacy, fit, scale.

Are strategy mechanisms enabling the presence and effectiveness of aligned resources?

How?

Is the strategy responsive?

Are important outcomes shifting as a result of aligned, coordinated, and effective resources?

Are important outcomes (still) important?

