



HUMAN SYSTEMS
DYNAMICS INSTITUTE

Quarterly Virtual Mini-Conference

June 22, 2018

Nothing is intractable.



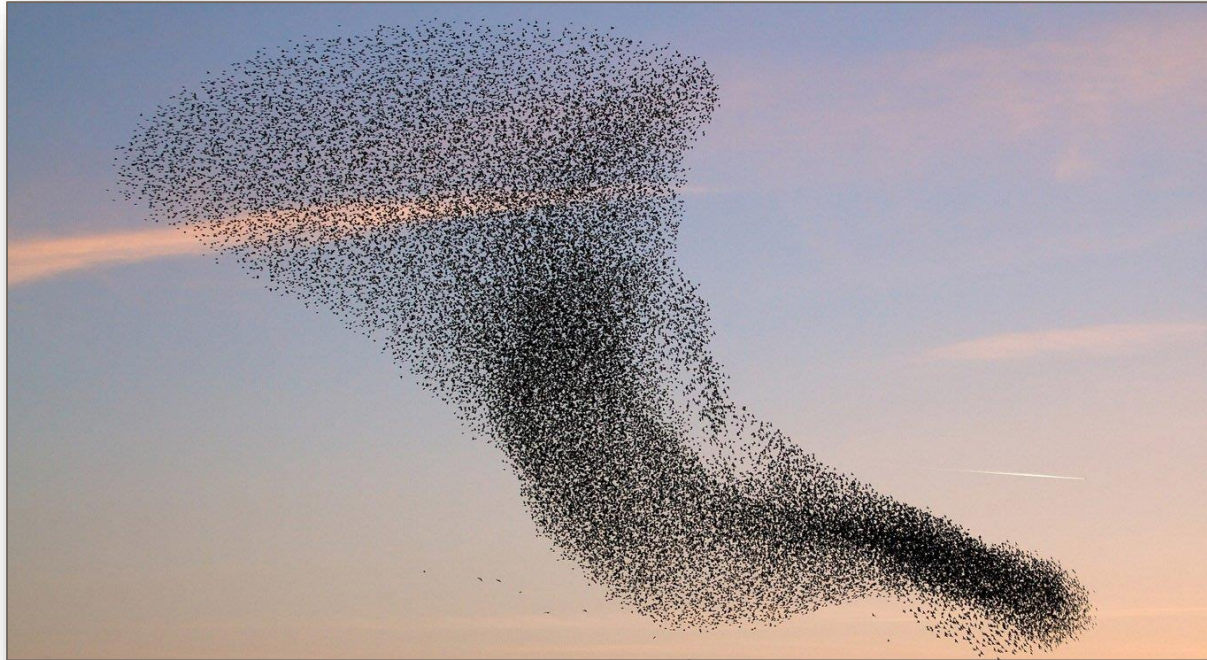
Welcome!

We are offering an outstanding session today, with these presenters:

- ▶ Glenda Eoyang
HSD Simple Rules
- ▶ Margaret Hargreaves
Adapting to Complexity: Evaluating Human Serving Organizations
- ▶ Stacy Barter
Using HSD to Start a Consulting Company
- ▶ Tina Anderson-Smith



Glenda Eoyang





Teach and learn
in every interaction



Search for
the true and
the useful



Give and get
value for value



Attend to the
whole, the part,
and the greater
whole



Engage in
joyful practice



Share your HSD story



Margaret Hargreaves



Adapting to Complexity: Evaluating Human Serving Organizations

Meg Hargreaves, Senior Fellow, NORC

June 21, 2018



Patterns of Human Dynamics

What are different patterns of dynamic activity?

- ▶ All situations or systems generate dynamic patterns of behavior.
 - ▶ Simple dynamics are fixed, static, and mechanistic patterns of behavior, as well as linear, direct cause-and-effect relationships between parts.
 - ▶ Complicated dynamics involve the coordination of multiple groups. Because of circular, interlocking, and time-delayed relationships among groups, unexpected results can occur through indirect feedback.
 - ▶ Complex dynamics involve massively entangled webs of relationships, from which unpredicted outcomes emerge through the interactions of many parts or actors within and across levels.
- ▶ Complex systems are adaptive; actors learn and coevolve as they interact with one another and respond to changes in their environment.



Adapting to Complex Dynamics

In what circumstances do human serving organizations need to adapt their services?

- ▶ Human serving organizations are encouraged to implement evidence-based programs (EBPs) with fidelity.
- ▶ However, in complex, dynamic conditions, EBPs often need to be adapted to serve people effectively.
- ▶ Examples of dynamic changes that can lead to adaptation include:
 - ▶ Serving groups with diverse characteristics (age, language, etc.)
 - ▶ Serving groups with social and economic barriers to accessing care
 - ▶ Serving communities with different levels of resources and capacities



Adaptive Action and Evaluation

How can evaluation support adaptive action?

- ▶ HSD's Adaptive Action Cycles use three questions to identify, interpret, and respond to changing dynamics: What? So What? Now what?
- ▶ Answering these adaptive action questions involves collecting, interpreting, and using information for strategic decision making.
- ▶ Evaluation provides systematic methods and approaches that can support adaptive activities.
- ▶ These methods and approaches include:
 - ▶ Continuous quality improvement (CQI) processes
 - ▶ Rapid cycle tests of innovations
 - ▶ Developmental evaluation approaches



Adaptive Evaluation for Different Dynamics

Which evaluation methods work well under different circumstances?

- ▶ Quality improvement, rapid cycle evaluation, and developmental feedback approaches serve different situational dynamics.
 - ▶ Quality improvement enhance the service delivery of specific practices within organizational programs and practices.
 - ▶ Rapid cycle evaluation methods evaluate organization-scale programs.
 - ▶ Developmental evaluations with rapid feedback mechanisms are appropriate for complex systemic change initiatives.
- ▶ These methods can be nested at appropriate layers, within complex initiatives. Each layer provides a context for the nested intervention.



Example: Accountable Health Communities

What are real-life examples of evaluating service adaptations?

The Center for Medicare & Medicaid Innovation's (CMMI) Affordable Care Act (ACA) Accountable Health Communities (ACH) Initiative is evaluating service adaptations at different levels:

- ▶ Evidence-based healthcare services (implemented without adaptation)
- ▶ Healthcare services with navigation services (to address service barriers)
- ▶ Healthcare services with navigation services PLUS adaptive action cycles with community partners (to address system and community barriers)

- ▶ Human serving organizations *serving diverse groups with unmet barriers to accessing services in communities with service gaps* can use adaptive evaluation methods to increase their effectiveness and impact at multiple levels.

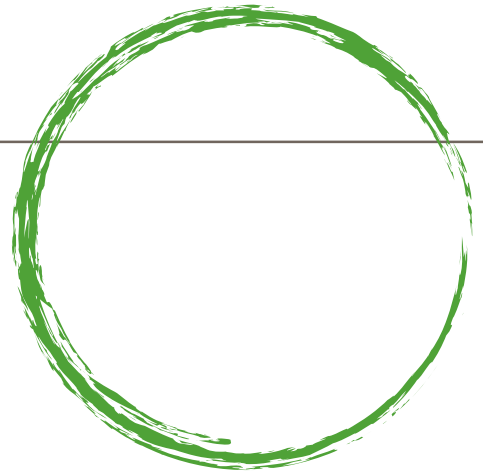


Stacy Barter



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USING HSD TO START A CONSULTING COMPANY





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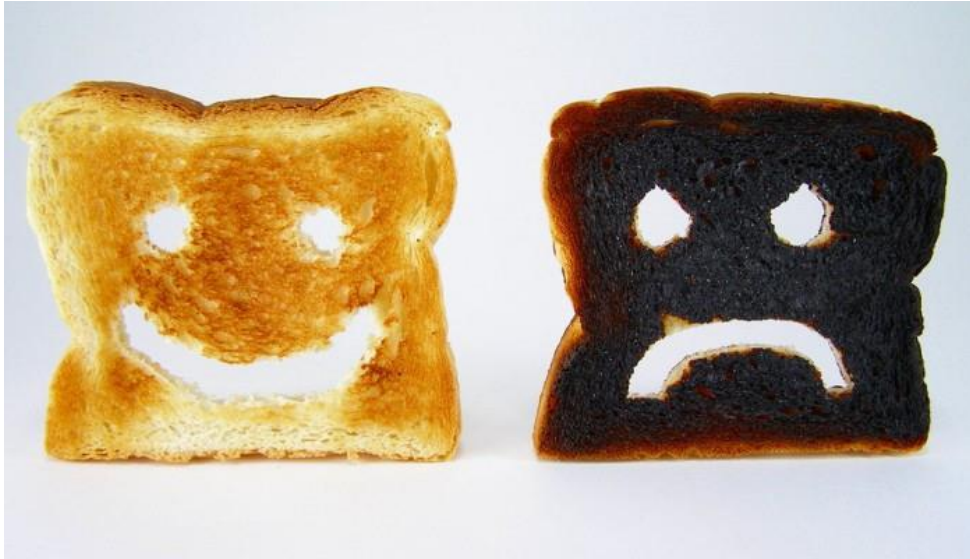
SHIFT

- ▶ **from working in isolation to working collaboratively;**
- ▶ **from addressing symptoms to tackling root problems;**
- ▶ **from dealing with single issues to changing systems, and**
- ▶ **from linear planning to real-time experimentation and adaptation.**





“Burned out Changemakers”



2014

Four Truths

Objective **Subjective**

Complex **Normative**

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New Container

Sense of agency...

SIMPLE RULES

- ▶ **Be Bold** — ask hard questions, ask something of our collaborators & participants, say no
- ▶ **Find The Opportunities** — leverage resources, be proactive, be creative with what we have
- ▶ **Fail Forward** — experiment, push the edge, take risks
- ▶ **Be The Difference** — embody & model the systems/qualities/skills that we are pointing people toward
- ▶ **Practice Radical Honesty & Vulnerability**
- ▶ **Stand in Solidarity & Friendship**
- ▶ **Trust Difference, Fan Its Flames** — seek what we each have to offer, highlight it, elevate it
- ▶ **Tend to the whole, the parts, and the greater whole**



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A better world is possible.

SHIFT Collaborative offers strategy, coaching, training and tools to support learning and leadership development, strategic impact and collaborative innovation for a healthier and more resilient world.



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What if shifting the way we think and work changes everything?

SHIFT Collaborative supports early skill development and engagement right through to facilitation of long term complex change initiatives and all the steps in between. Together, we help you tackle root causes and achieve measurable impacts on the issues you care about.



SHIFT Collaborative's 3 Main Areas of Work

**LEARNING &
LEADERSHIP
DEVELOPMENT**

**STRATEGIC
IMPACT**

**COLLABORATIVE
INNOVATION**

SHIFT's SIMPLE RULES

- ▶ **Welcome abundance and trust in the unfolding**
- ▶ **Co-create a powerful, greater whole** – look for opportunities & synergies
- ▶ **Try stuff out, and get shit done!**
- ▶ **Practice radical honesty & vulnerability – embrace conflict as generative**
- ▶ **Stand in solidarity and friendship** – honour our strengths and frailties
- ▶ **Strive towards the leading edge of the field**



Embedded in practice

- Adaptive Action
- Leading in Complexity
- Finite/Infinite
- Same/Different
- Simple Rules



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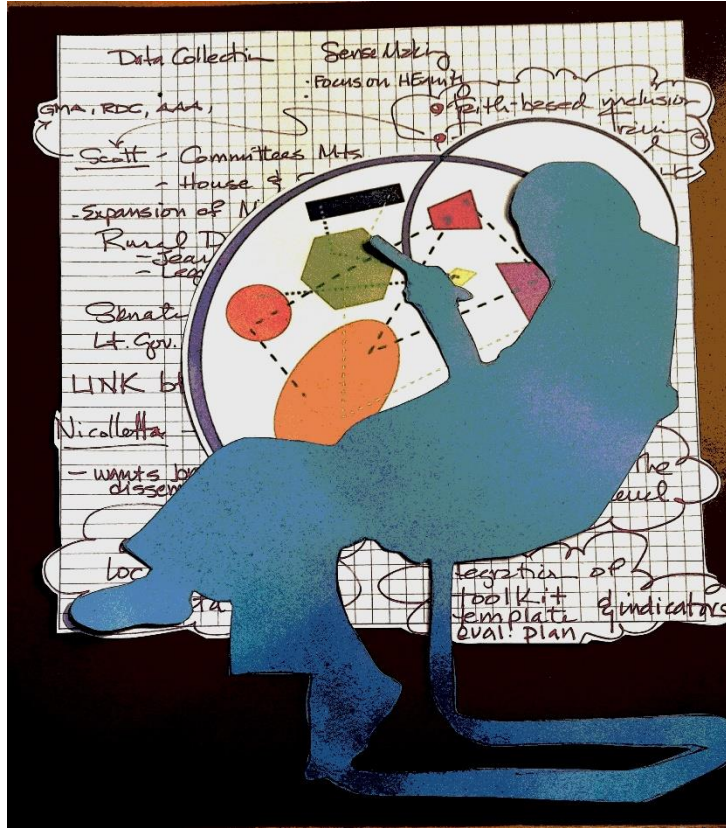
THANK YOU!



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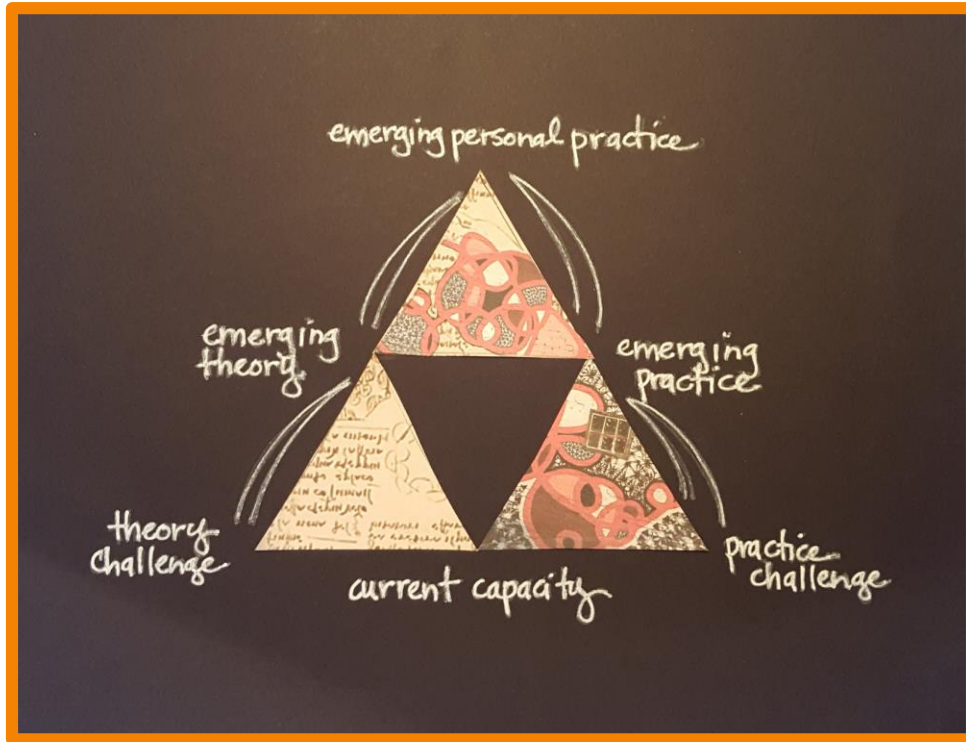


Tina Anderson-Smith



What?

- ▶ Failures of/Limits to Imagination
 - ▶ The Patterns I see
- ▶ The Adaptive Imagination
 - ▶ What is it?
 - ▶ What possibilities does it present?
- ▶ HSD as Muse
 - ▶ Patterns and Possibilities
 - ▶ Community Conversations
 - ▶ Focus on Praxis



So what?

...are some of my “sticky issues”?

- Describing my practice
- Defining a “movement”
- Sustaining rural health networks

...are examples in which an Adaptive Imagination helped me find a path forward?



Defining my practice...

So what do I do?

- ▶ Program design
- ▶ Planning
- ▶ Culture Change
- ▶ Technical Assistance
- ▶ Evaluation
- ▶ Coaching
- ▶ Sensemaking
- ▶ Building Learning Systems
- ▶ Organizational Development

In what domains?

- ▶ Social Policy
- ▶ Population Health
- ▶ Rural health
- ▶ Social Justice/Equity
- ▶ Climate Change
- ▶ Gentrification
- ▶ Racism
- ▶ Violence and Injury Prevention

With whom?

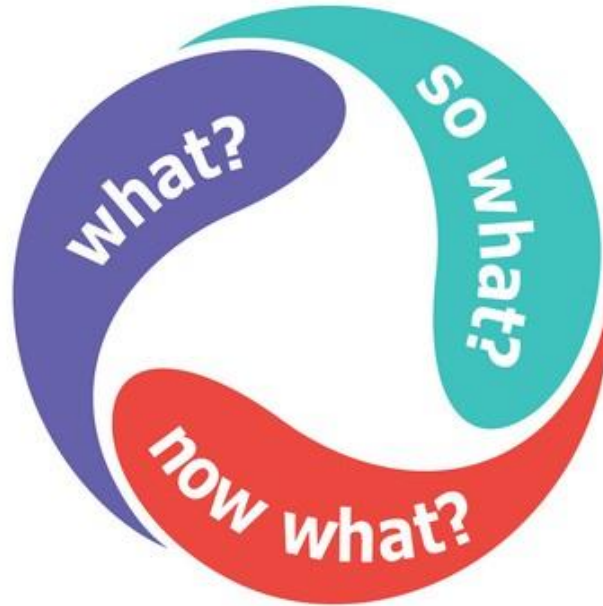
- Local, state, national; public and private; organizations and individuals including foundations and legislators





Defining my practice as supporting and facilitating Adaptive Action

- Evaluation
- Curation of Concepts
- Building contextual Intelligence – considering the part, the whole, the greater whole
- Describing Systems



- Sensemaking
- Participatory Analysis of Data
- Reflective Practice
- Formulating powerful questions
- Facilitating communities of practice

- “Planning”
- Program Design
- Technical Assistance
- Organizational Development
- Culture Change
- Coaching

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Framing a “Movement” as a Fractal

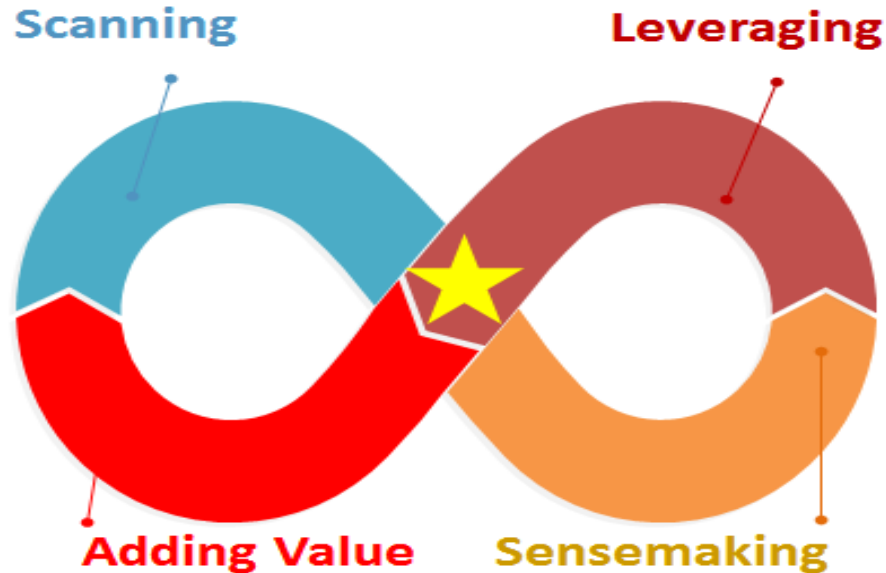


Implications for:

- ▶ Organizational Culture
- ▶ Board Development
- ▶ Values-based organizing
- ▶ Evaluation
- ▶ Strategic Planning
- ▶ Tool Development
- ▶ Formation of Alliances
- ▶ Communication



Describing Rural Health Network Sustainability as an Infinite Game



Implications:

- Same/different for Conventional Strategic Planning, PDSA
- Federal Grant Guidance and Deliverables
- Technical Assistance design and orientation
- Planning tools and template design to build adaptive capacity
- Evaluation



Now what?

- ...Step might you take to feed your muse?
- ...Next action might fuel your Adaptive Imagination?



Join us for upcoming webinars:

We are taking a summer break from these Live Virtual Workshops, but will be back in August!

- ▶ Aug 2 – *Get Ready: Learning for the Future*
- ▶ Sep 6 – *Networks of Networks: Build Coalitions to Co-Create a Future*
- ▶ Sep 20 – *Quarterly Virtual Mini-Conference*



Learn more...

- ▶ Explore online at HSDInstitute.org – including **Resources** and **Learning Opportunities**
- ▶ Join us for these Adaptive Action Labs in 2018:

HSD Professional	Sep – Nov	Atlanta, USA
Certification	Dec – Mar	Horsham, England
	Nov - Mar	Vancouver, BC
Public Adaptive Action Labs	Jun: Leadership	Online
	Aug: Diversity, Equity, &Inclusion	Online
	Sep: Networks	Online



Thanks!

- ▶ To our presenters:
 - ▶ Glenda Eoyang
 - ▶ Margaret Hargreaves
 - ▶ Stacy Barter
 - ▶ Tina Anderson-Smith
- ▶ Mary Nations and Jennifer Jones-Patulli, who support us with technology here and streaming on Facebook.
- ▶ And to you for joining us on this journey!