

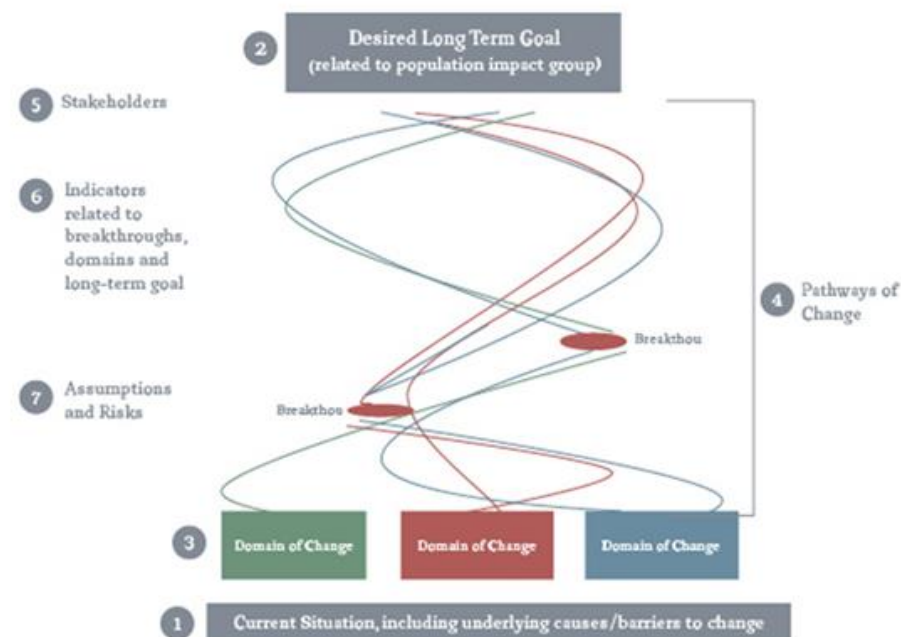
CLD PLANNING AND EVALUATION FRAMEWORK (PLAN, ACT, LEARN, ADAPT - REPEAT)

A bit of a plan, not a lot of a plan

Tightly defined, traditional planning approaches don't easily suit the very emergent, adaptive work of CLD. Yet we still need a bit of a plan for a shared understanding of where we think we are going. By creating a Theory of Change together, we can uncover our thinking – into a bit of a plan – that guides our actions. It shows how/why we expect what we are focusing on will contribute to our long-term goal. It helps us be more adaptive, nimble footed and effective in the way we act. In the most extreme case, we may gather evidence that requires us to reframe our thinking and our actions all together. A theory of change is evolving all the time. It is a 'good enough' model. Not everyone will agree with it and things won't happen in exact accordance with it. But it should provide an explanation of how the major underlying causes of an issue or barriers to change to be addressed. We develop, test and review our theory of change by observing what actually happens over time and adapting our thinking and actions accordingly. We often do this with questions:

We start with Why? to understand motivations, purpose and rationale (1)
Success? What does success look like? And for who? Our long-term vision (2)
Where are we now? What do we already have that can help us get there? Our asset map baseline. Where on the eco-cycle are we? (1)
What things do we think we need influence to achieve our vision? How will we keep these on our radar and also notice other domains that might emerge too? (3)
How? What pathways and processes could help us achieve our vision? How will we work together to have fun, be very serious, go fast, take our time? (4)
Who is already here, who to engage with and how, who will lead, who will notice what matters and what changes? Who else could help influence what needs to change? How will we recruit people into our project? Piggyback on theirs? (5)
What? What will we actually do? What will we notice and document? What will be key indicators of progress and success? How will we learn as we go? (6)
What assumptions are we making? What potential weaknesses or gaps in our collective thinking? What do we need to test, address or let go? What risks do we need to take? (7)

We check in with this framework as we take decisions and observe what's emerging. Is this still our goal then? We can backcast from our goal to build a timeframe. If this needs to happen then, then what needs to happen before that? How will we know that has happened? Create some indicators. Add new information to your plan as you go. Document as you go. What happened on these pathways of change (4)? How well did that go, why? Who was involved, how? What was achieved? Are we still on track, what do our indicators say? What new possibilities emerged? What did we do with that, why, how? (a developmental approach - templates, stats, surveys, interviews,



critical friend discussions, learning and outcome stories) What does this mean? Where are we now? Are we on track, what else is going on? What have we contributed to this new situation and what now?

1. Our Vision/Theme/Goal: A strong, connected community where people contribute and join in		3. Critical/powerful questions	4. Analysis/Reflection/ Sense Making	5. Actions or adaptations (& back to 1)
2. Performance/Outcome indicators				
Participation Number of people engaging or attending meetings, events or other activities	Progress Number of resident- led projects underway	What common patterns or themes are coming through our performance indicators/feedback? What are we learning about what’s enabling a strong, connected community and everyone’s involvement? What’s getting in the way? What surprised us? What was unexpected? What tensions or contradictions are we working with/noticing?	A rapid increase in children and parents (mostly mothers) being engaged in our activities. We think the new School Principal arriving has played a big part in supporting school engagement with us. The new interest and activities this is generating is pulling our energy and attention away from building stronger engagement with mana whenua. Also, aware a lot of elderly, new migrants and men not engaged that much. The pleasant surprise is to find the new relationships at the school with parents and staff are opening up new connections with the local hapū members.	Use school hall and engage the children in helping spread the word for a trial community shared meal around winter solstice Build connections with mana whenua through school and other networks, invite participation in community dinner and explore potential links around Matariki activities Identify jobs we need help with and ask for help from the children in doing community newsletter and letter box drop to reach out to invite contributions to organising the dinner and joining in with it
Performance excellence Stakeholder feedback assessing health of relationships and processes in place	Possibility/ Innovation Confidence that community action underway will make this community a better place to live, work and play in	What does this mean for what we need to do next – individually and collectively?	So time and energy is stretched but school relationships and opportunities could help progress other connections too	
People/ population Number of residents who know the names of more than 5 neighbours	Policy/systems Changes in funding and support for locally-led projects and activities			

This framework has been filled in with examples to illustrate how this one page tool might help you pull together:

- 1. Your shared vision** that expresses your WHY (purpose, intent, goal) for your CLD initiative - see [community vision building](#) for tools to help you grow that vision
- 2. Your performance/outcome indicators** that you keep on your radar to help you track progress towards what think success might look like - see explanation of the 6 P indicators below [Are we making a difference? Noticing Progress and Evaluating Community-led Action, Impact and Change](#) resource for more information
- 3. Some powerful questions** that help you explore the data you have gathered and which feed the next step (4) – see [how to design powerful questions](#) resource for shaping your own questions
- 4. Your analysis/reflections/sense making** of patterns, themes, conclusions emerging. This is the So what? Now What? conclusions you want to draw together from your observations, data and reflections into. See our [facilitating learning and teamwork resource](#) to get you thinking about your role in facilitate good learning conversations in your rōpū/group
- 5. Your action plan or adaptations of your previous plan** because we keep learning and adapting based on what opportunities and challenges are emerging
- 6. And we return to where we began – 1. our vision** – to always keep swimming towards the horizon with an open gaze to navigate the best way forward with the time, energy, weather conditions and support we have found for now.

Have a go, with using this tool for your kaupapa/vision and adapt this framework to what works for you, as you keep learning and discerning where your community waka is heading, and what matters most to have on your radar to navigate the water and weather around you to move towards a great community to live, work and play in.

About the CLD Indicator Lenses:

- 1. Participation Indicators: engagement, involvement and ownership of local people and stakeholders in what's happening. (Who). Eg. #of local people involved in visioning, # different sectors or clubs, # people not usually involved.**
- 2. Progress Indicators: actions taken to achieve local visions and goals. (What happened). Eg. new plans/projects developed/implemented, new co-funding arrangements etc.**
- 3. Performance Indicators: track effectiveness of processes, infrastructure and frameworks in place to achieve local visions and goals. (How/how well). Eg. Effectiveness of collaboration arrangements, people feel able to have their say/contribute**
- 4. Possibility Indicators: changes in belief about what's possible locally, new potential arising and a willingness to act. (Can do/do next). Eg. people putting up hands to volunteer/help out when asked, confidence that XX initiative is making/will make XX a better place to live.**
- 5. Population or People Indicators: changes in wellbeing outcomes for local people. (What's changed and for who). Eg. reported increase in community pride, stable school roll.**

6. **Policy/Systems Change:** tracks impacts and changes on bigger picture thinking, funding, policies, approaches that local CLD efforts have contributed to. (Now being done differently). Eg. local visions/goals now included in others' plans (DHB, Council etc), increase in local investment, willingness of local Council to support an issue/proposal from local people.

ABOUT



Local wisdom²

Inspiring Communities catalyses locally-led change, to achieve sustainable, effective outcomes.

We are the reference point for community-led development in New Zealand, building on international and local practice-based evidence to grow and share expertise.

Inspiring Communities operates across many sectors at multiple levels.



RESOURCES

Harakeke/Flax - from the root to the flower the harakeke shares its properties.



ADVICE

Korimako/Bell Bird - fluent, graceful speaker.



EVENTS

Whakaatu/Presenting - the peak of the mountain as a stage to present from

Talk to us about your CLD training, workshop needs, coaching, support and opportunities in your community or region. We understand diversity! We can tailor packages to your specific requirements.

Email us exchange@inspiringcommunities.org.nz