State of the Field Panel on the Evaluation and Assessment of Transformation: A Case Study of Response to the Polycrisis

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Abstract

As part of the Transformations Conference 2023, an expert panel was assembled to provide a "State of the Practice" regarding the field of evaluation and assessment as applied to the type and scale of transformations needed in response to the polycrisis. Panelists address the questions surrounding how attention to the concept of transformation affects their work, using transformative change as a new kind of evaluation, the ways in which evaluation and transformation go hand-in-hand, and their advice for those paying attention to the cross-scale and nonlinear nature of transformation. Responses to these topics shape a new direction for the evaluation field to support a wide range of competencies required to evaluate and actively enable expressions of more just, equitable, and regenerative forms of transformation. This work requires new types of case studies, more diverse and interdisciplinary communities of practice, and stronger partnerships with those actively working on large-scale system transformation.

Introduction

As we confront the reality of our global polycrisis (Morrin and Kearn, 1999; Kunstler, 2005; Homer-dixon et al., 2015), there is growing urgency for evaluating and assessing the transformations needed across multiple scales, time horizons, etc. As part of the opening online session for Transformations 2023, six experts from around the world offer important insights on the state of the practice of evaluation and assessment as each embraces the challenge of transforming complex social-ecological systems (Patton 2021) in their own practice. The panelists were selected based on their contributions to the field of evaluation, as well as their practice. This clearly demonstrates that evaluation and assessment are critical to stewarding positive systemic transformations (Fazey et al. 2018), not least because they can

provide developmental feedback to increase the likelihood of success and help to understand the impacts of transformations in general (Ofir and Rugg 2021).

Panelists from other parts of the world were invited based on their experience with evaluation and to ensure a diversity of country contexts.

● Kate McKegg is a seasoned evaluator with over 30 years of experience spanning consultancy, board leadership, teaching, and parenting, specializing in empowering individuals, organizations, and communities to make practical use of evaluation for their goals. As the Chair of the board of Xtreme Zero Waste Ltd, she advocates for local circular economies and the true valuation of precious resources, showcasing her deep commitment to social and environmental justice.
● Mark Cabaj is a multifaceted professional who has worked as a policy maker, funder, and activist, contributing significantly to poverty reduction, energy transition, and health care. His expertise includes establishing the Tamarack Institute, leading collective impact networks, and shaping the practice of Developmental Evaluation. As the President of Here to There Consulting Inc., he provides strategy and evaluation support to initiatives driving innovation and system change.
● Mutizwa Mukute is a dedicated advocate for just, sustainable, low-carbon societies, bringing his wealth of experience in environmental work since 1988. As an international environmental education specialist and transformative change evaluator, he has conducted over 40 evaluations for various organizations, focusing on agriculture, food systems, climate change, biodiversity conservation, and education.
● Ian Goldman has a rich background in rural development, decentralization, and evidence-based policy-making, emphasizing empowering approaches to planning, monitoring, evaluation, and learning. He played a pivotal role in establishing and running South Africa's national evaluation system and currently serves as the President of the International Evaluation Academy, contributing to evaluation initiatives in various capacities, including climate funds, global evaluation, and public sector troubleshooting.

All members of the panel recognize that evaluation itself needs to be transformed if it is to be relevant for evaluating transformation (Patton 2019, Patton 2021) because many conventional and mainstream evaluation methods are ill-suited to transformation contexts. As some panelists note, there are various reasons mainstream methods are inadequate, including assumptions of linear order, stability, and objectivity, their technocratic/colonial approach, and their control by market forces, which make these methods inadequate for working with the scale, complexity, uncertainty, urgency, ethics, and power implications of societal transformation (van den Berg et al. eds. 2021). Accordingly, the members of the panel refer to a growing number of approaches, tools, and initiatives that have been developed for evaluating transformation (Williams et al. 2021).

Evaluation for transformation is a theme that is receiving greater prominence in several recent evaluation conferences – spawning a few books on transformational evaluation (van den Berg et al. 2021, Uitto et al. 2022) and the Prague Declaration on Evaluation for Transformational Change, which lays out a set of pledges for transformational evaluation, (van den Berg et al. 2021) a special journal issue, and the creation of the International Evaluation Academy (IEAc). The fact that this panel leads Transformations 2023 online

session illustrates the growing significance of evaluations' perceived contribution to transformation. In addition, several major networks and funding organizations have started to embrace transformational evaluation, such as the IEAc (Ofir and Chaplowe 2022), Tamarack Institute (Cabaj 2019), Rockefeller Foundation (Rockefeller Philanthropy Advisors 2021), Global Alliance for the Future of Food (GAFF 2020), Centre for the Evaluation of Complexity Across the Nexus (CECAN) (Ofir 2021), and the Rippel Foundation (Gates et al. 2021). Overall, while there is increasing momentum and coherence in transformational evaluation, it is still far from being mainstreamed (Picciotto 2021), and panels such as this one that focuses on the "State of the Practice" are critical to underscore how leading practitioners are integrating this work and shifting their own behaviors, values, and exploring transformative practice.

Broadly speaking, each of the members of the panel has been working on fundamental shifts required for evaluation. These shifts include how the practice of evaluation can engage with *complexity* as well as the adoption of more complexity-aware and developmental evaluation approaches. Understanding these differential power dynamics is another major focus on the shaping of the evaluand (the focus of the first question), with examples of methods for decolonizing evaluation, embracing diverse perspectives, developing more autonomous evaluation practice, cultivating mutualistic partnerships, and embracing spirituality. The work requires a deeper exploration of *values* in general, including the ethical stance and non-independence of evaluators, the importance of surfacing and understanding the values held by evaluands, and the need for reflexivity. In addition to aligning evaluation to the realities of systemic transformation (Junge et al. 2020), the panel references experiences from their practice to illustrate reasons why these shifts are needed. These include adaptation to changing conditions (Patton 2010), focusing on the agency and creativity of those involved in the evaluation, emphasizing shared learning and resilience (Sibanda & Ofir 2021, Gates et al. 2023), encouraging commitment to act on evaluation results (Bilella et al. 2021) and underscoring the ethical imperative (Gates et al. 2023).

RESULTS: The Dialogue

The introduction by Page framed the state of the field in the context of the polycrisis: *How do we actually engage with and evaluate progress toward the idea of transformation and actually enable it given the state of the Anthropocene, the Polycrisis, etc? The field of evaluation and assessment is an essential and rapidly growing field that has risen to this challenge. How do we understand this challenge? How do we learn? How do we adapt? How do we navigate into the uncertain future?... This field is very collegial. It's very supportive. It's rooted in friendship, but it's also rooted in rigor. It's rooted in helping each other better understand the local context that we're all facing within and apply a wide range of methods, tools, and approaches. What we all know is that to address this concept of transformations we need to transform the field itself.*

The Moderator (Patton) built on the concept of the Polycrisis and reminded the panel and audience of the timing of the event, "*recognizing that last week was the hottest in recorded history, which gives us the immediate sense of what we're facing here. Everybody is well aware of this, and Glenn made reference to the polycrisis where the climate emergency, in addition to the crises of massive misinformation, extreme weather, food insecurity, growing economic turbulence, the global pandemic, and growing inequalities together, creating a*

complex systems interconnection being called the polycrisis. Therefore, the calls for transformation have intensified."
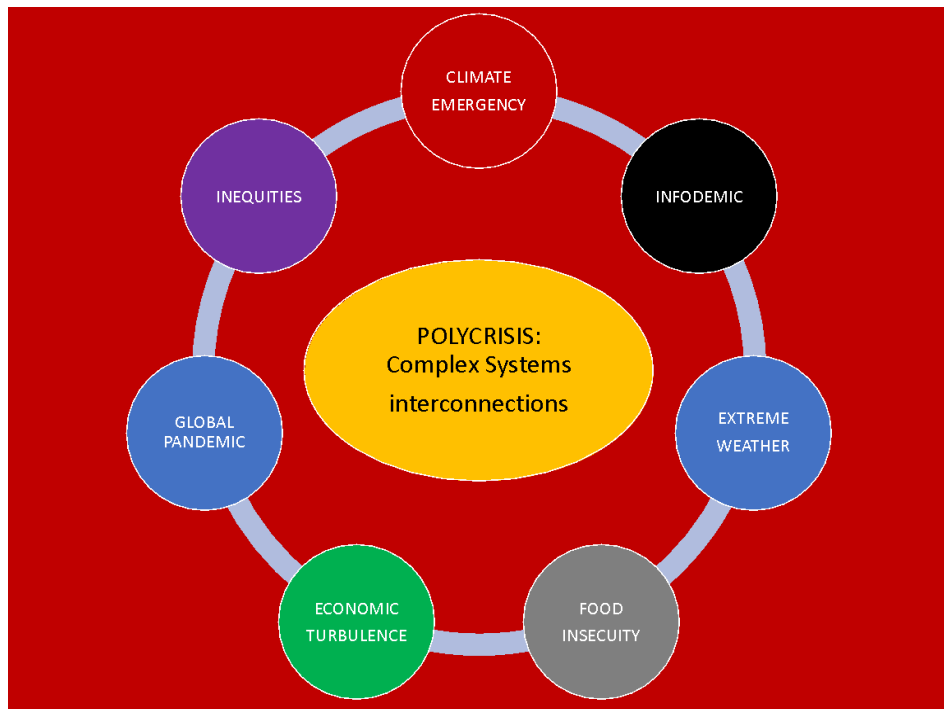

Figure 1: the linkages across complex, dynamic, cross-scale social, ecological, and governance issues that form the polycrisis. (Image Credit: Michael Quinn Patton)

The moderator (Patton) focused on the primacy of criteria for evaluation. He notes, "*So, the question is: Will evaluation be part of the problem or part of the solution? As we look at the state of practice evaluation, we say we grew up in projects with a 'project mentality' with smart goals, logic models, and standardized criteria of effectiveness, efficiency, relevance, impact, coherence, and sustainability (really meaning continuity). These standardized criteria have been applied to projects around the globe. Over the last 50 years, evaluators have become adept at evaluating projects and programs, goal attainment, outcomes measurement, implementation evaluation, and generating findings, lessons, and recommendations. But the field is now being asked to evaluate mission fulfillment, strategy, innovation, advocacy, policy impacts, systems change, complex-dynamic interventions, community impacts, regional initiatives, networks and collaborations, leadership, inclusiveness and diversity, collective impact, scaling, environmental ecosystem sustainability, global systems change and yes, transformation.*"

Figure 2: the importance of shaping the evaluation criteria to fit the context of the evaluation, which is critical for the evaluation of transformation. (Image Credit: Michael Quinn Patton)

QUESTION 1: The moderator (Patton) then posed the next question to the panel: **How does the attention to the concept of transformation change the focus of your work? How do you approach transformation as a different unit of analysis, a different kind of evaluation?**

- Kate McKegg:
  - **Summary:** Kate emphasizes the depth and multi-layered nature of transformation, focusing on personal, organizational, and societal levels. She works towards radical shifts in power, supporting those most affected by inequities. Kate sees herself as a systems-change activist and actively engages in indigenous-led efforts for justice and revitalization. She offered an example of the Tokona Te Raki (www.maorifuture.co.nz), which is an indigenous Māori Futures Collective working to transform what they call broken wisdom systems.
  - **Key Quote:** *"I look for ways I can support radical shifts in power to those most defeated by the system inequities because there's no doubt for me that the meaningful transformation will require radical shifts of power and decision-making to actually be effective."*
- Mark Cabaj:
  - **Summary:** Mark discusses the imperative of transformation in the context of a clean energy transition. He highlights the importance of working across scales, from individual mindset shifts to understanding the larger context of the energy transition. Mark emphasizes the need to consider diverse roles and interventions within a system for effective transformation.

- **Key Quote:** *"If we're in the game of building a planet that's going to survive, we're unavoidably in the game of transformation."* He describes an approach at the start of complex contexts, noting, "The *first question is not what we need to do. They are what needs to be done? Who is doing what? Within that analysis, we should then ask, "What's the highest and best contribution we can make to the change process?"*
- Mutizwa Mukute:
  - **Summary:** Mutizwa emphasizes the concept of relatedness in transformation, drawing from African philosophy. He shares an example of assessing the development of an African food policy, highlighting the interconnectedness of scales, themes, and stakeholders. Mutizwa stresses the importance of acknowledging and engaging different stakeholders in complex change processes.
  - **Key Quote:** *"The unit of analysis and the evaluation in transformational change… is essentially about relatedness. Relatedness is part of Ukama – a sister concept in the African philosophy of Ubuntu."*
- Ian Goldman:
  - **Key Quote:** Ian focuses on the concept of a "just transition" to address social, climate, and ecosystem health. He discusses the integration of criteria for transformative equity and climate and ecosystems health in evaluations. Ian advocates for the integration of evaluation into the entire policy cycle, emphasizing the need to redefine agendas and incorporate just transition considerations.
  - **Key Quote:** *"The importance is not just in evaluation, but pushing that for all interventions – asking, how are you factoring in these issues about just transition?"*

QUESTION 2: The moderator (Patton) posed the second question to the panel: **What advice would you have for people who want to pay attention to the cross-scale and nonlinear nature of transformation? What's your advice about how evaluating transformation changes the nature and level of evaluator engagement? How can evaluation contribute to a deeper understanding of transformation and thereby amplify transformation?**

- Mutizwa Mukute:
  - **Advice:** Negotiate boundaries across scales, identify enabling and constraining conditions, and pay attention to different dimensions of transformational change. Focus on the relevance of strategic focus, systemic change, scale, and sustainability.
  - **Pay Attention To:** Risks, uncertainties, and contradictions as potential drivers of learning and change.
  - **Key Quote:** *"I would encourage them to pay particular attention to risks and uncertainties because they disrupt transformative pathways during the journeys; and also, to pay attention to contradictions as potential drivers of learning and change."*
- Ian Goldman:
  - **Advice:** Integrate criteria on transformative equity, climate, and ecosystems health into evaluations, focus on futures work, and move towards reflexive systems. Move from expected outcomes to unexpected outcomes and consider what is likely to work for the future.

- **Pay Attention To:** Engagement in the process, such as the involvement of government teams in the evaluation and bringing evaluative thinking into the monitoring.
- **Key Quote:** *"We've got to be looking, not just for the expected outcomes, but the unexpected outcomes... Similarly, we've got to be thinking about - not what's worked in the past - but what's likely to work going forward."*
- Mark Cabaj:
  - **Advice:** "Shrink the change" by focusing on the influence within the zone of control, using systems mapping to understand interconnectedness, and thinking big but shrinking the change.
  - **Pay Attention To:** Cognitive overload and emotional toll on practitioners in transformative management may lead to a loss of agency.
  - **Key Quote:** *"Change Management' is where you're moving from one place to another, and you know where you're going. But we're in 'Transformative management.' - how do you leave something, but not entirely sure where you're going to?"*
- Kate McKegg:
  - **Advice:** Acknowledge overwhelmedness, practice values-based transformation as a relational practice, release the hierarchy of evidence, and support people in their transformative transitions. Evaluators' role is transforming into being part of the change.
  - **Pay Attention To:** Transformation cannot be imposed; it requires acknowledgment of histories and healing work.
  - **Key Quote:** *"If we stick to the old scripts of logic models, impact models, and outcome hierarchies, I'm not sure we're going to get where we need to go. We need to flip that script into what is valuable and valued by those we are working with."*

QUESTION 3 from the Audience: One of the participants appreciated the dialogue on suggestions and advice on how to see the change, enable change, and enhance the change in a specific context. The question was, "***What about being the change? In what ways that we as evaluators need to be different, not just work in different ways.***" Here are abbreviated responses from the panel:

- **Ian Goldman:** *I became President of the International Evaluation Academy in July last year, and that was exactly the point that if we were going to bring about this transformation, we needed to demonstrate by example the transformation of relationships that would enable us to open our minds and create new futures. The way we, as a group, ran the Academy in a much more collective way was part of creating that change, emphasizing co-ownership, co-creation, transparency, etc. This was very important for us to allow an atmosphere that would allow the "new" to happen.*

- **Kate McKegg:** *One of my commitments is not to travel as much. I've formed deep relationships with lots of people across the globe, but actually making a change means not traveling to visit them face-to-face, and that is a very significant shift. I work locally more now...I'm working as the chair of an organization that's been going for at least 25 years and is moving the whole community to ZERO waste. We're now diverting 80% of our waste. We're trying to get to 100% creating a*

circular economy in our little community with syntropic food planting and permadynamic gardens across the community. So, we're working really hard to be different kinds of people.

QUESTION 4 from the Audience: One of the participants noted the framing of the polycrisis and the sheer enormity of the tasks at hand, asking, **"*Few have any time for working with a systems evaluator during such crisis-states. What is your experience of what helps most at such polycrisis times?"***

- **Michael Quin Patton:** *Part of the work that has emerged is moving from the Theory of change to the Theory of Transformation. A theory of change is how to achieve the outcome of the specific project and what the mechanisms of change are within a project or program. As we move to the Theory of Transformation, we learn from understanding big transformations of the past like the end of colonialism, the end of slavery, the collapse of the Berlin wall, the "me-too" movement worldwide, the changes in technology that we're all experiencing now, major systems transformations. These kinds of transformations are not top-down and planned, with somebody in charge. Transformation occurs synergistically and collectively. What you've heard from the panel is that we get to transformation by everybody doing their piece. The end of apartheid in South Africa involved people working inside, people working outside, people working on regulations, on finance, on education, on sports, and on changing the portfolios of foundations. There was this collective action where everybody does their piece. So, to support transformation, those engaged need to align and accelerate their collective interactions. The classic wisdom on what to do individually was expressed by Arthur Ashe, the great tennis star, the first African American World champion, who was regularly asked by people what they could do about structural racism. What could anybody do about these big issues? His response was, "Start where you are, use what you have, do what you can. Let me repeat that: Start where you are, use what you have, do what you can. "That's what I think you've heard from the panelists. Each of us must do what we can in our own backyard look for connections and networks with other people who are working on transformation. That's how we create cumulative effects. That's how we begin to move towards critical mass, by having each of us do what we can by starting where we are and using what we have.*

QUESTION 5 from the Audience: One of the participants asked Kate McKegg about tools, methods, and techniques. **"*Could you share a little bit more about the tools and techniques that, in your experience, have been effective for fostering evaluative thinking?"***

- **Kate McKegg:** *One tool that I will mention is what I call Pattern Spotting. It was given that name by the Systems Dynamics Institute, but actually, I learned it from Bob Williams... The reason I found it such a useful tool is that it applies when we're playing with lots of data and when we are grappling with streams of different kinds of data. It uses a thinking process that takes us from the generalizations and in-general kind of thinking that we do as humans, that patterning that we do, that we're reasonably good at, and it pushes us down into deeper and deeper levels of thinking to contradictions and tensions and surprises and puzzles. I've found that it helps people to think more deeply about what's*

going on and to unpack assumptions. To not feel the need to necessarily solve issues but realize that there are tensions and contradictions all around. It helps see more systematically and then explore what the next wise or valuable action might be in the context…I've found it a very useful tool.

QUESTION 6 from the Audience: The final question focused on issues of spirituality: ***"Do you consider spirituality to be a largely unspoken underlying human dimension that participates in change facilitation?"***

- **Mark Cabaj:** *…I don't often talk about spirituality, but I've experienced it [in an evaluation]. How do we "show up" in the world? Part of it is to model… our own spiritual journey of change so that it becomes normal for everyone. …I was working on an innovation lab here in Edmonton that was dealing with racism. The group wanted to smush a couple of methodologies or worldviews together in a creative way to make that happen. One was "human-centered design," another was a "change lab," and the third one was reconciliation and "two-eyed seeing," an approach that emphasizes Indigenous people's way of knowing and being alongside Western ways of knowing. I was working with a powerful Indigenous woman who was actually an advocate of human-centered design because it is based on a commitment to generate insight and empathy of other perspectives, which can help as a way of leveling the playing field. So, we thought that was a great way of introducing insight and empathy into a conversation about racism… The decision was to pick the river valley in Edmonton as a focus and to explore the extent to which racism and reconciliation manifested themselves in the river valley. At one point, Jodi said, "I just realized we can't use human-centered design and reconciliation and two-eyed seeing at the same time." I said, Jodi, how can we not? This is our secret sauce. This is what's gonna get this issue into the hearts and minds of just thousands of Edmontonians. And she said, "If we're being true to an indigenous worldview, there is no human-centric anything in the river valley. The fox is as important as the river, as important as the marsh, etc. It's not possible to be human-centric in an Indigenous worldview." And I remember my poor Western brain going clunk, clunk, clunk with smoke coming from my ears. I could not register that. I got it intellectually - I just didn't get it at another deeper level. And then it hit me...I got it, I felt that change in my body. Believe it or not, now I cannot cross any river in Edmonton or anywhere without actually just seeing energy flows of all these things together. So, whether that's spirituality or not, these are transformative moments we all have. And there have to be billions of them for all of us to experience transformation happening… So, I think part of the job of evaluators is to normalize that spiritual dimension by living it out as well.*

- **Kate McKegg:** *We begin almost every evaluation engagement that I have in New Zealand with Karakia. Karakia is a prayer…to move us from one state of being to another, to acknowledge the transition from where we've come from and to the new space that we're in... I guess that we (settlers to New Zealand) are very fortunate to have been able to grow this practice because of the guidance from our indigenous colleagues. For Māori people in New Zealand, spirituality is a given. It's just part of everyday life and work* (Kennedy et al. 2015).

New Zealand has just recognized its first indigenous holiday, which is the Māori New Year, which happens in our winter, not in our summer, and we now have a public holiday called Matariki (https://www.matariki.com). We are learning as settlers to New Zealand about the importance of the heavens and the stars and their guidance, their link to ancestors. Matariki is the cluster of stars that rise in New Zealand in our winter, and these stars and their spiritual ancestors have been a spiritual and practical guide to Māori for hundreds of years.

DISCUSSION

The moderator summarized to the panel in the final moments with the following:

- **Michael Quinn Patton:** *What people have heard today is a transformation of evaluation where evaluators bring their full selves into the work. The traditional mandate that evaluators be independent, external, neutral, and outside the fray is history. That approach to evaluation is outdated. The transformation that you're hearing in the panel is a group of people who have… soul in the game and recognize that they bring their values, what they care about, and all of themselves to this work - and that's different. When people experience that among evaluators. I think what we find is affirming as a State of the Practice.*

Panel responses collectively highlight the importance of negotiation, attention to multiple dimensions, criteria integration, reflexive systems, and the acknowledgment of the overwhelming challenge of transformation in the evaluation process. The following section defines themes that surface in each of the questions.

Themes in responses to "QUESTION 1":

- **Emphasis on Power Dynamics:**
  - Both Kate McKegg and Mark Cabaj touch upon the significance of power dynamics in their work. Kate explicitly mentions supporting radical shifts in power to address system inequities, while Mark discusses the need to understand power dynamics at various levels within the energy transition.
- **Importance of Systemic Thinking:**
  - Mark Cabaj and Mutizwa Mukute share a common thread in their emphasis on systemic thinking. Mark discusses the importance of understanding the larger context in which energy transition occurs, while Mutizwa emphasizes relatedness and interconnectedness in the context of African philosophy.
- **Integration of Different Perspectives:**
  - Ian Goldman and Mutizwa Mukute both highlight the importance of engaging diverse stakeholders. Ian discusses the need for a diversity of perspectives in international contexts and the importance of procedural and restorative justice. Mutizwa emphasizes the engagement of various stakeholders in the development of an African food policy.
- **Focus on Just Transitions:**
  - Both Ian Goldman and Mutizwa Mukute touch upon the concept of a "just transition." Ian discusses his focus on a just transition to address social, climate, and ecosystem health, while Mutizwa's work in assessing the

development of an African food policy aligns with the idea of an inclusive and sustainable food system.

Themes in responses to "QUESTION 2":

- **Reinforming the Primacy of Systemic Thinking:**
    - Mutizwa Mukute emphasizes negotiating boundaries and paying attention to different dimensions of transformational change.
    - Ian Goldman discusses the importance of moving towards reflexive systems, considering unexpected outcomes, and looking at the larger context of the future.
- **The Primacy of Criteria for Evaluation:**
    - Mutizwa Mukute and Ian Goldman both mention the importance of specific criteria that define evaluation (enabling and constraining conditions, transformative equity, climate, and ecosystems health) in order to more effectively assess transformation.
- **Engagement and Agency:**
    - Mark Cabaj expresses concern about people who are working on wicked challenges getting overwhelmed and losing a sense of agency in transformative processes and what that may mean for the field of evaluation of transformation.
    - Kate McKegg advises acknowledging overwhelmedness, practicing values-based transformation as a relational practice, and supporting people in their transformative transitions.
- **Importance of Shifts in Thinking:**
    - Ian Goldman and Mark Cabaj highlight the need to move away from conventional thinking, considering unexpected outcomes, and focusing on what is likely to work in the future.

Themes in response to the audience "QUESTIONS 3-6":

- **Collective and Cumulative Efforts:**
    - In QUESTION 4, Michael Quin Patton emphasizes the need for collective action and everyone doing their part to contribute to transformation during polycrisis times.
    - In QUESTION 5, Kate McKegg discusses the importance of Pattern Spotting, a tool that helps people think more deeply about what's going on and encourages a systemic view. This aligns with the idea of collective intelligence and shared understanding.
    - In QUESTION 6, Mark Cabaj shares an example of working on an innovation lab in Edmonton, highlighting the importance of combining different methodologies and worldviews (human-centered design, change lab, reconciliation) for a more comprehensive and transformative approach. This also speaks to the power of collective perspectives.
- **Adapting to Change:**
    - In QUESTION 5, Kate McKegg mentions her commitment to change, such as reducing travel, and talks about working locally on projects contributing to a circular economy. This reflects personal adaptations for broader societal impact.

- In QUESTION 6, Kate McKegg describes starting evaluations in New Zealand with Karakia, a prayer, to acknowledge transitions and set the tone for a different space. This ritual represents an adaptation in evaluation practices.

The resonance of these themes highlights the values of experts in the field of evaluating transformation and the importance of seeing interconnectedness of collective efforts, transformative thinking/acting, and how adaptation is expressed in addressing complex challenges and facilitating change. Evaluation's shift towards embracing values and transformation underscores the importance of moving from an individual perspective to one of relationship to people and planet, building collective agency, facilitating ambitious and imaginative visioning exercises (expressing what people desire to see in a transformed future, i.e. their normative values) (Gates et al. 2021, Norman 2021), co-developing 'theories of transformation' informed by complexity and systems thinking (Patton 2021), and fostering conditions for reflexivity and learning (Fetterman 2017).

Panel members focused on transformation and pointed out implications for the kinds of criteria and indicator frameworks chosen. Any indicators, or indicator frameworks, used should also be sufficiently holistic, assessing multiple dimensions (e.g., economic, fiscal, environmental, social) of sustainability because systemic transformation cuts across sectors and issues (Patton 2021). More useful indicator frameworks may be those that are not overly prescriptive but focus on the signals and preconditions of transformational change. These include the Signals of Transformational Change framework (Williams et al. 2021), Patton's six criteria for evaluating transformative development (Patton 2021), the Orders of Outcomes Framework (Olsen 2013, Page et al. 2022), and the Regenerative Development Evaluation Tool (Gibbons et al. 2020). Principles, in general, can become powerful, locally adapted evaluation criteria for complex system contexts (Patton 2021), which underpins the approach of Principles-Focused Evaluation (Patton 2018).

Evaluation's shift towards embracing values and transformation underscores the importance of moving from an individual perspective to one of relationship to people and planet, building collective agency, facilitating ambitious and imaginative visioning exercises, and co-developing 'theories of transformation' informed by complexity and systems thinking (Patton 2021). It is, therefore, valuable for evaluators to apply system concepts and frameworks such as complexity theory, living systems theory, socio-technical systems, social-ecological systems, critical systems thinking/heuristics and boundary critique, as well as frameworks for understanding transformative change, such as socio-technical transitions, Three Horizons (Sharpe et al. 2016), leverage points (Davelaar 2021), the Iceberg Model, Panarchy and Adaptive Cycles (Patton 2011).

Conclusion

The State of the Practice Panel emphasized that evaluators, as Michael Quin Patton noted, **"have soul in the game** and recognize that they bring their values, what they care about and all of themselves, to this work - **and that's different."** This underscores the need for evaluators to be 'bricoleurs,' adept in selecting, combining, and modifying methods to suit their particular context (every evaluand, after all, is unique) and primacy. These methods may even include 'traditional' linear evaluation approaches, such as formative and summative evaluation cycles, if appropriate to the situation. Mixed methods are typically essential for the complex, multidimensional contexts of transformation. A key role for the evaluation field is

then to support the wide range of competencies required in transformational evaluators, with more case studies, establishing and supporting communities of practice, and developing stronger partnerships with those actively working in large-scale system transformation.

Acknowledgments

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