

Organic Evaluation at Santropol Roulant

If you happened to be strolling down the eastern slope of Montreal's Mont Royal one afternoon, and walked down Duluth Street for a block or two, you would find yourself passing by a building covered by green graffiti. If you timed your walk just right you would notice the smell of a simmering stew - or pasta sauce, or fish, or steamed carrots, or cake - coming from the inviting-looking kitchen. If you were fortunate enough to arrive exactly at 3:00 pm, you would be likely to see a dozen or so youngish people swinging sacks of hot meals onto their backs and happily walking, cycling, or driving off in all directions.

Suppose then that you noticed the always present "Volunteers Wanted" sign on the door, and you walked in to find out more. You would immediately find yourself in conversation with someone who seemed genuinely happy to leave her pile of papers and talk with you for a bit. You might be surprised to learn that you had unexpectedly stumbled directly into the middle of Santropol Roulant's evaluation process, and that your questions, experiences, and ideas were considered an honored and integral part of that process, despite the fact that you'd never heard of the organization before.

In truth, to call evaluation at Santropol Roulant a *process* at all is a bit misleading. For us, evaluation is a particular way of working and thinking together that has emerged over time. We've given what we do a name, "organic evaluation," but we can't claim to understand it perfectly, even yet. This paper is an attempt to bring together our experiences with, and thoughts about, evaluation. It is neither a prescription nor a simple description. It is a meditation, and we hope these ideas will prove as meaningful for you as they have for us.

Who We Are

Since 1995, Santropol Roulant has been bringing people together across generations and cultures through innovative approaches to community health. Through an elegant and unique model, Santropol Roulant bridges two seemingly disparate social issues – an aging population and youth engagement. Our primary program is our Intergenerational Meals-on-wheels program, a unique twist on a traditional community service which engages a diversity of people in the community – while feeding those in need. We deliver much more than just meals - we break social isolation and allow meaningful exchanges between the generations.



Now in its seventh year, Santropol Roulant has delivered over 200,000 meals to seniors, has engaged over 1,000 volunteers and given 125 young people meaningful employment in the community.

Santropol Roulant is an organization with a history of innovation and creative development. We have experimented with a host of programs and activities. Whether through our unique Meals-on-Wheels service, the Skills Exchange, le Carrefour des Generations or the campus-based Projet GO clubs, the Roulant has created a dynamic forum for action and inter-action among and between generations, particularly around issues of malnutrition, social isolation and food security.

Evaluation at Santropol

At its most basic level, evaluation is simply a process of self-examination. What does an organization do well? Where does it need to improve? What do things cost? What are they worth? What kinds of new opportunities are available? Typically, this process is framed in a linear system of goal setting, measurement, analysis, and reporting. Such systems tend to run parallel to the core operations of the organization. They are managed separately from the organization's daily activities. In this sense, evaluation is viewed as nothing more than a component or function of the organization.

At Santropol Roulant, evaluation is not a linear “function” at all. Nor is it separate from our ultimate mission. It is a particular way of being together and of bringing people together. The key element to this is the lack of hierarchical, “departmental”, bureaucratic structures that are in place. It is very clear what everyone's goal is at the end of the day – delivering 90 meals to seniors and people living with a loss of autonomy across the island of Montreal. As a result, we have created a space for open dialogue, almost an “anti-structure” which breeds openness, and flexibility due to the informal nature of employees' relationships with each other, and due to the constant accessibility of employees to volunteers, clients, and the public.

This way of being together, inviting people in, and bringing people together is, in essence, the key element to our organizational culture and structure, it is woven into the fabric of what we do every day, and it involves the following:

Questioning – Everyone involved in the organization - staff, volunteers, clients, funders, board members, community residents – is encouraged, even expected, to question things on a daily basis. Is what we are doing (right here, right now) aligned with the organization's purpose? Is there another way to do it that might be more effective, more creative, or more fun? Are there things that I would like to be involved in that we are not doing right now? A culture of questioning is at the heart of our approach to evaluation.

Reflecting – Members of the Santropol Roulant community meet together almost continually, sometimes formally, but more often informally, to reflect upon the work we have done and the work we'd like to do. During these dialogues, such as the Community Feedback Night, people share their questions, concerns, and ideas with each other.

Experimenting – As the need for change is perceived, Santropol Roulant members are encouraged to develop new projects and new ways of doing things. These experiments lead not only to a broader and more effective array of services but also to new ways of understanding the mission and meaning of the organization. This willingness to be innovative has been equally part of the initial organizational growth and of developing who we are, what we do, and how we fundraise.¹ It is riskier for an organization like ours not to be inventive and innovative – to venture nothing and stagnate. Experimentation is not risky if it is done responsibly, guided by the organization's mission and core values.

¹ The key to our flexibility is that we are not tied to or dependent on any one funding partner. We have a broad base of partners from all sectors, a strong base of individual and community supporters, and a growing capacity to self-finance. Funding stability remains a challenge, but our values-driven/mission-based approach drives our all programs, including our fundraising, which itself we look at as one of our community-building programs.

Sharing – We try to develop deep and ongoing relationships with funders and volunteers so that we can move beyond simple reports and program summaries and integrate our supporters into the organization. In this way, supporters are able not only to “evaluate” Santropol in a meaningful way, but also to contribute directly to the growth and evolution of the organization.

Evaluation Practices: Two Approaches

Traditional Evaluation	Organic Evaluation
Gather Data	Ask Questions
Analyze Data	Reflect Together
Disseminate	Share
Implement Organizational Change Efforts	Experiment and Explore

At Santropol Roulant, evaluation is ultimately about *exploring* the organization and this shared exploration is continual and often quite messy. We see evaluation not only as a tool for understanding but also as a tool that can lead toward **empowerment** of both the organization and the individuals who make up the organization – an inclusive, engaging, organizational development process. Ultimately, evaluation is not so much about where we hope to go as it is about who we hope to become.

Perhaps some stories and examples will help illustrate why we believe that organic evaluation is a radically different perspective leading to radically different results than traditional evaluation. Below, we explore three of the chief functions of any evaluation approach: understanding problems, discovering opportunities, and measuring the value produced by the organization.

Understanding Problems

Problems emerge naturally via conversation, questioning, and reflection. A close connection to problems results in energy, speed, and appropriateness in addressing them.

In the summer of 2002, Santropol Roulant was buzzing with an unusual amount of activity. New projects, many new staff members, and an influx of summer volunteers had all converged to make the generally lively Santropol Roulant offices even more lively than normal. The staff soared from 8 to 21 for the summer.

The ***One Voice, Many Generations*** intergenerational festival consumed a great deal of planning and coordination time, with a team of 3 students and a co-ordinator. A new group of Youth Services Canada participants were engaged for a 7-month skills development program. The latest in an ongoing series of Emploi-Quebec contracts had brought in 2 new staff members for 6-month contracts and 2 summer students were employed.

From the outside, this particular summer would have looked like one of the most exciting and productive periods in Santropol Roulant’s seven-year history. Energy was abundant and projects were moving forward with speed and creativity.

But amidst the excitement and enthusiasm there was a growing sense of unease. The various groups seemed to have little connection to each other or understanding of what the other groups were doing. There was no real cohesion among the new staff and volunteers; each project director had hired people independently, with little input from other parts of the organization. Tension soon built up and conflict developed around roles and responsibilities. The Meals-on-wheels program, Santropol Roulant's anchor, began to suffer as people spent most of their time trying to figure out how to coordinate all the activity that was pulling the organization in so many directions. Though people felt it and expressed it in different ways, it became clear that the harmony the organization relied on was weakening. Santropol was out of tune.

Identifying this problem was neither simple nor straightforward. The problem was not obvious from any one particular vantage point. In many organizational contexts, this kind of confusion can lead to a long-term sense of disconnection and unhappiness. At Santropol, however, problems like this tend to surface rather quickly; our deeply rooted culture of participative questioning and reflecting creates a kind of *dispersed organizational dialogue*. Through this dialogue, people naturally arrive at a shared sense of what the problem means and what its causes are.

Many aspects of Santropol Roulant contribute to this culture. One large open room that contains staff desks, meeting areas, couches, bicycles, bulletin boards, plants, photos, artwork, and especially snacks dominates our physical space. There is little emphasis on roles. Staff, volunteers, board members, and clients (those who are mobile) circulate freely through this space at all times of the day. It is not unusual for a staff meeting to be going on in the middle of the room while volunteers are milling about, speaking to clients, and getting ready for their shifts. The organization also cultivates an openness to receiving wisdom from any corner and in any form.

In this case, it seemed clear that the misalignment Santropol Roulant was experiencing had two causes. First, since individual project managers had done their own hiring, there was no shared sense of who the new people were or how they would fit into the organization. In a way, Santropol Roulant, *as an organization*, hadn't hired anybody. Its managers had. Secondly, because so many projects were moving forward so quickly, there had been no chance to orient the new people in any meaningful way to they would develop a real understanding and compassion for the mission and core values of the organization.

To prevent similar problems from happening in the future, we decided to create a hiring committee composed of 1 board member and core staff. This committee would bring some consistency to the hiring process, allow input from several areas of the organization, and provide a way for new employees to begin connecting with the organization as a whole, not just with the project team they would be working with directly. In addition, we set up a month-long orientation for new employees, so they could understand the organization from a larger, more holistic perspective.

We also had to address the problem's immediate symptoms and re-align the people who had already been hired. We did this through participatory discussions of our core values and vision – and got input from people on how to prevent these kinds of problems in the first place. We came up with a new orientation package which included a statement on how we are mission-driven, team-oriented, and how we all share responsibility.

Although these solutions sound relatively simple, several things about this example are indicative of the way that organic evaluation works at Santropol Roulant when it comes to problem solving. First, we attacked the root of the problem, the hiring process, and not simply the stress and

conflict that were currently surfacing. Because the problem had been explored and defined in a natural, emergent, participatory manner, the people involved in addressing it had a deep sense of its nature that went well beyond a hasty symptomatic assessment. A symptom-based answer might simply have focused on conflict management without experimenting with ways to prevent the problem from happening in the future.

Second, we addressed the problem with integration rather than centralization. ***Because organic evaluation is multi-vocal and participatory, it tends to favor complex, systemic solutions rather than mechanical, component-based solutions.*** Instead of creating new hiring rules, regulations, or standards, and instead of centralizing the hiring by assigning responsibility to one person (e.g., the executive director), we integrated the hiring process by involving several people (with several perspectives) in a consistent way. This type of integration involves making connections between people and the organization deeper rather than making them narrower. At Santropol Roulant, staff members, the board, and prospective employees now have a richer medium through which to interact during the hiring process.

Third, the problem was addressed very quickly. The hiring committee and orientation process were in place by September, just a few months after the problem originally surfaced. ***Organic evaluation is a continuous process, and it is aligned with the organization's natural rhythms.*** This alignment allows solutions to be discovered and attempted with all appropriate speed (no more, no less). Traditional evaluation generally has a set of time constraints that are external to the organization's normal operating rhythms. A six-month review and analysis of organizational progress, say, may force the organization to explore and respond to problems long after (or long before) they become clear. This makes it difficult to take advantage of the problem-solving energy of people, since this energy does not come and go at will. It is highest when a problem is current enough to feel important but not so new that no sense of shared understanding has been reached yet. Evaluation processes that force problem solving into an arbitrary time structure are in danger of wasting the energy when it is available or forcing it to act before it is coherent.

Discovering Opportunities

Successes can be misleading when judged from an external perspective. A true success maintains organizational coherence and flow.

Success isn't always what it seems. One of Santropol Roulant's most visible and innovative projects was our Carrefour des Generations, which ran from 1999-2001, funded by three large Foundations. The Carrefour was an intergenerational community center housed in the Santropol Roulant offices. Twice a week, we sent out cars to pick up house-bound clients and bring them to the center for activities and collective meals. The Carrefour proved to be a powerful way to establish intergenerational connections and to create community for both our clients and our volunteers.

But the project had a downside. It took an enormous amount of time and logistical energy to coordinate, and despite its clear benefits, it caused the organization a great deal of stress. It was exhausting.

It became clear over time that the organizational infrastructure had been turned upside down. Santropol Roulant was built to deliver food and connection *out* into the community, to *radiate*

energy from a vital hub. Relationships were nurtured through daily interactions between volunteers and clients in the clients' homes. Technical expertise had been developed around food preparation and delivery coordination. The Carrefour program reversed the direction of Santropol Roulant's services and expertise; it relocated interaction from the home to the office; it turned the organization's basic energy flow back on itself.

And this happened essentially because of an evaluative misconception. Overlooking its own strengths, Santropol devalued the small but significant interactions that had been at the center of the organization's mission and reframed them in a formal, funding-driven structure. The Carrefour was a discreet, fundable, exciting new project with obvious benefits. But in the end we decided not to maintain it. An external evaluation might have told us that the program was a resounding success and should be developed even further. Our own organic evaluation told us something different.

Opportunities arise from a shared understanding of organizational energy, rhythm, skills, and aspirations.

One of the great benefits, however, of an integrated, participatory approach to evaluation, is that problems quite naturally bloom into opportunities. As we struggled to understand what was happening with the Carrefour program, we realized that it had been so demanding that our opportunities for reflection and imagination had been noticeably curtailed. As the Carrefour stress increased, we began a collective planning or visioning process in the form of a strategic planning process in order to provide ourselves with some much-needed mental space. We hoped to discover opportunities for the organization to evolve that would once more be aligned with Santropol Roulant's strengths and basic energy flow.

As a direct result of this process, we are also currently developing a program called Touch Base. Touch Base is being created in order to reach out and connect with those of our clients who are least mobile and most isolated and to give volunteers the opportunity to connect in a variety of different ways with our clients. The program is an attempt to take up the themes we explored in the Carrefour, but to do so in a way that builds from our strengths. It will become part of the natural rhythm of our core Meals-on-wheels program rather than competing with it.

Measuring

Measurement requires a combination of simple *counting* and complex *conversation*.

In the end, of course, one of the primary purposes of any evaluation process is to assess value. What is the organization contributing to the world? What are the resources it uses to provide this contribution? This type of assessment is intimately connected to a voluntary organization's ability to raise money and to develop relationships with funders.

Two principles are key to the way that we assess value at Santropol Roulant.

I. First, quantitative measures need to be simple and frequent. They need to be simple, because for evaluation to be truly organic it has to be participatory. And few people have the time or inclination to study complicated statistical data. At Santropol Roulant, we track basic output and basic costs via figures such as: number of meals per month, number of volunteer hours per week, meal costs, and individual program costs. These measures need to be frequent because, as we've emphasized, organic evaluation has to operate in a way that is synchronized with an organization's daily work. Quantitative measures that are available as needed can inform questioning and reflection in way that measures produced less frequently cannot.

II. The second assessment principle at Santropol Roulant is that for things to be measured fully, they can't simply be counted; they have to be described in rich, qualitative ways. Any value assessment process basically involves comparing benefits to costs, but a simplistic view of what these benefits and costs are can lead to a seriously distorted picture of value creation within an organization, particularly in the voluntary sector. In fact, in the voluntary sector, it's important to go beyond the *value* created by describing the social *meaning* that is created. At Santropol Roulant, we believe we create meaning.

This meaning cannot be reflected in simple numbers. A meal delivered to a homebound person can be counted. And it is important to do this kind of counting. But the simple conversation between the volunteer and the client cannot be counted, such as the feeling of being valued or heard. The security that the client feels in being able to call us at any time just to chat cannot be counted. The growth in confidence, creativity, and connection that a volunteer might experience cannot be counted. These things can be shared with others only by telling stories and by inviting people to have these experiences themselves.

If the meaning an organization creates is not adequately described and shared, the organization's work runs the risk of being perceived as a commodity. If all we do is prepare and deliver meals, then it's a sensible question to ask why our meal cost is \$3.50 when someone down the street is producing the "same thing" for \$3.00. An alternative perspective calls for a kind of deep differentiation: not the kind of differentiation that tries to persuade us that there is a difference between Nike and Reebok, but the kind that truly reflects the nature of the work that the organization is doing.

Evaluation based on differentiation also requires deep relationships with funders. Funding organizations are part of the organic evaluation process, not simply consumers of that process. **They must taste and touch the organization over time, actively participating in the reflecting, questioning, and sharing process or they too will tend to treat the organization's work as mere commodity.**

It is important not only to describe the costs and benefits deeply but also to describe them completely. For example, a volunteer hour can be seen as a contribution, a cost (that "pays" for itself) and a benefit. The volunteer both gives to and receives from the organization. When tallying up benefits, many organizations overlook the personal growth experienced by volunteers and the community growth that can result from this kind of engagement.

What is “Organic” about Organic Evaluation?

The word ‘organic’ can mean many things, but we usually associate it with what is alive, natural, and whole. What is organic has an innate structural coherence. Organic evaluation is about bringing an organization to life by deepening that coherence. Here are some of the ways in which we’re learning to think about what evaluation means to us:

It is rooted in who we are . . .

Traditional evaluation focuses on what an organization *does*. We have found that evaluation is more highly leveraged when we focus on who we *are*. It is not that we think that what we do is not important. Quite the contrary. Preparing food, delivering food, and connecting people are at the center of our organization. Without this “doing,” Santropol Roulant would not be a meaningful organization, nor in the end would we survive. But in our experience, if we evaluate ourselves by focusing exclusively on the mechanics of what we do, our ability to improve remains incremental. Worse, this narrowness of focus can cause us to ignore profound problems and opportunities that simply aren’t showing up (yet!) in our day-to-day operations.



On the other hand, focusing on who we are leads to a much clearer sense of what is right and what is wrong in our organization. In the end, if we pay attention to our shared sense of meaning, our ways of working together, our relationships, we are inevitably *shown* just what we need to do. In this sense, we believe that ‘doing’ flows *from* ‘being’. They’re both important, but you have to get them in the right order. If traditional evaluation can be thought of as process of *course correction*, organic evaluation can be thought of as a process of continual *re-centering*.

It is holistic . . .

Traditional evaluation is discreet. It happens in clearly defined stages that are quite separate from each other. Organic evaluation is holistic, even holographic. At every moment, with every interaction, all of its “stages” (questioning, reflection, sharing, etc.) are happening at once. Although conceptually we can think of these stages as separate, in practice they are not divided at all. Reflection and participation are present in questioning. Sharing and questioning are present in reflection. If an organization’s evaluation process is truly organic, each interaction between any two participating human beings contains the seeds of the entire process.

It is integrated . . .

Not only does traditional evaluation take place in discreet stages, but these stages tend to be conceived of as occurring separately from the organization’s day-to-day operations. This kind of evaluation, even if it is done internally, can be thought of as a way of looking at the organization from the outside in. That is, the evaluator, whether internal or external, tries to find a position from which she can look clearly *at* the organization. She is explicitly distanced from the organization.

Organic evaluation is a *part of* the organization’s daily operations. It is built into every facet of what the organization does. It is intrinsic. There is no “evaluator” looking at the organization from a particular perspective. The organization *looks at itself* from multiple perspectives.

It is informing . . .

The traditional evaluation process is often clearly and formally defined. It is crafted so that it explicitly coincides with the organization’s visible, formal systems. Organic evaluation is informal in the sense that it is not based on an explicit set of procedures and definitions. And it is not only informal, it is “informing” in two senses: it informs by providing information; and it informs by giving rise to emergent “forms” or structures. These emergent structures are different from formally defined structures. They are deeper, more flexible, and more richly connected to the organization’s visible *and* invisible systems.

It is participatory . . .

Organic evaluation doesn’t require experts. At least it doesn’t require experts in evaluation. Instead, it treats everyone as an expert from his or her own perspective. Everyone involved in the organization is continuously engaged in evaluation. Note that this is very different from an evaluator who includes multiple perspectives by interviewing people. While this practice is certainly better than not including multiple perspectives, there is a real difference between being asked to describe your feelings or give an opinion and being actively engaged in the evaluation process. Each member of the Santropol Roulant community is an evaluator in his or her own right, perfectly capable of discovering value or discovering where it is lacking – which is empowering to all involved.

It creates value . . .

Rather than simply analyzing or assessing value, organic evaluation creates value. Because it is holistic, continual, integrated, and participatory, it increases the engagement of organization members. Consequently, new ideas, solutions, projects, products and services flower naturally from this engagement.

Principles of Evaluation: Two Perspectives

Traditional Evaluation	Organic Evaluation
Rooted in What We Do	Rooted in Who We Are
Focused on Course Correction	Focused on Re-centering
Linear and Discrete	Holistic
Separate From Daily Operations	Integrated
Formal	Informing
Expert-driven	Participatory
Value-Assessing	Value-Creating

Where is the Downside?

We don’t mean to suggest that there is no place for traditional, formal evaluation processes or that organic evaluation is without its difficulties. Several of these difficulties are clear to us:

- Organic evaluation can’t be “implemented.” It can only be nurtured with a great deal of attention and care over a long period of time.
- Funders may demand more explicit evaluation processes. We are interested in working with funders who are willing to take the time to explore the organization with us. Our evaluation methods do not lend themselves to simple summaries or predetermined reporting formats. At

times, we decide against using particular funding sources because their evaluation requirements are not in harmony with our approach to organizational development.

- Even Santropol Roulant staff, board members and volunteers do not always find it easy to work with such a continual and open-ended process. Sometimes it would feel more comfortable to be assessing ourselves against a clear timeline and a clearly defined set of goals.
- How do we ensure there is leadership or a “champion” so that the organization, including board, staff, volunteers and others, experiences continued capacity-building and growth?
- We still have a great deal to learn in terms of distilling what we do into formats that our different partners understand – for example, cost-benefit analyses, social return on investment and other forms of measurement and analysis. In other words, we also need to identify what we could and should be evaluating, and have loose frameworks so that we can learn from these processes.
- Documentation: it is very difficult to document our learnings because things move so quickly at Santropol Roulant. Our challenge is to incorporate documentation into our evaluation process to maximize our learning, and to retain organizational memory.
- We are also struggling to find ways to share our experiences with other organizations. We speak to those interested in those interested in social innovation and finding new ways to organize, manage in the voluntary sector, but how do we speak to other funders or organizations whose perspectives or approaches are very different than ours. So much of what we do and what we know is tacit that we are still learning how to make our ideas explicit enough to transmit to others.

Our biggest organizational challenge is developing processes and tools that allow us to integrate our evaluation findings into the day-to-day operations of the organization, keeping it alive and accessible in a way that helps us continually revisit our mission, our *raison d’être* in the first place.

Growing an Organic Evaluation

This paper arose from our attempts to reflect more carefully on what evaluation means to us. It has allowed us to do two things:

- to value the way in which we actually do evaluate and to understand that we have a unique and special organizational culture that fosters this kind of on-going, participatory evaluation.
- to identify where we need to develop certain tools or access specific information about our programs in order to understand even better the value we are creating, the impacts we are having, and the results.

The important aspect of this process is that we took the time to identify and value our organizational strengths and processes, rather than starting from what we do not do and what we need to do better.

The key question is how can organizations move away from more traditional ways of doing things and move towards organic evaluation?

Our goal is not to offer a prescriptive recipe but to suggest an alternative perspective, one that is based on our own experience and that values our organizational culture. While we believe that this perspective is evocative, we don't claim that it is definitive in any way.

This paper outlines what works for Santropol Roulant and it is very clear that an open, flexible, non-hierarchical organizational "structure" which encourages input and creativity is one of the key elements to our flow between feedback, response and change. Organizations interested in developing new ways of evaluating need to start with identifying the positive elements of their organizational culture, how they already communicate with each other, and their flow between feedback, response and change.

Ultimately, evaluation is about vision, and articulating a vision of organizational practice. For Santropol Roulant, our vision is to empower the organization and our programs, as well as the individuals that make up the organization. Why are we evaluating in the first place? It is much more than to meet the needs of funders; it must be an inclusive, engaging, organizational development exercise which aims to improve Santropol Roulant's practice and not just to measure results. We are questioning, reflecting and experimenting all in the spirit of empowering ourselves to improve the organization and to develop new models that address social issues, and that are a catalyst for community development and social change.



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