

A VOLUME IN EVALUATION AND SOCIETY

# VISIONARY EVALUATION

FOR A SUSTAINABLE,  
EQUITABLE FUTURE



*edited by*

BEVERLY PARSONS  
LOVELY DHILLON  
MATT KEENE

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# **Visionary Evaluation for a Sustainable, Equitable Future**

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A volume in  
*Evaluation and Society*  
Jennifer C. Greene and Stewart I. Donaldson, *Series Editors*

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# PREFACE

Sparks of hope, possibility, opportunity, and energy are enlivening society and nature, bringing forth transformation and inspiration to a world filled with rapid and challenging changes. We can all be part of igniting life-giving sparks through our daily actions, thus shaping the future for all of us.

Join us as we use the art of storytelling to envision a future of well-being that we believe can bring life to values that revolutionize our thinking, actions, and outcomes for people, planet, and nature. Join us in turning in a new direction despite the turmoil of our times.

In this book, we use creative elements and a collaborative approach to encourage learning in a way that diverges from the norm. The story is set in motion by a conversation that occurs in low-Earth orbit in 2030. The book engages with three diverse scenarios about the future: the extension of current trends toward mass extinction; the extreme and rapid advances in all facets of technology including artificial intelligence; and the bringing about of a sustainable, equitable future.

We invited change makers from multiple sectors—social protection, nature, law, business, health, financial investing, transportation, education, and design—to envision the future by writing in terms of 2030. We use “Praxis Quests” to illustrate how diverse “questors” support one another to reweave a net of supporting theory, practice, inquiry, and more to enact the values of sustainability and equity. We bring the story together around the book’s title: *Visionary Evaluation for a Sustainable, Equitable Future*.

As choreographers and orchestrators of this book and its story, we invite you to take the position of a “Visionary Evaluative,” a term we coined to



envision and experience our whole selves engaging differently in evaluative processes. We focus on the power of values in adjusting the trajectory of life. We anchor to two core intertwined values—equity and sustainability—as we adjust our personal and professional lives.

We especially call on our colleagues in the transdisciplinary field of evaluation—either as practitioners of evaluation or users of the processes and results of evaluation—to step up to the power of evaluative inquiry as a means of igniting a future of well-being. The book is intended to help us all reposition ourselves, not only in relation to evaluation, but also to our many other roles in this world. The book is not a toolkit, yet it can potentially revolutionize how we use tools of all types to engage in co-creating a sustainable and equitable future for people, nature, and the planet.

We believe in the goodness and power created by people who interlock their values with those of others to envision and create a desired future. We experience this daily as we work with inspirational people who are dedicated to the well-being of the world across highly diverse situations, sectors, geographies, and communities.

Before you jump into the book's framing and story, a few words about the backstory and the supporting steps beyond this book.

## **THE BACKSTORY**

This book has its roots in our shared work around the theme of the 2014 conference of the American Evaluation Association<sup>1</sup> that bore the same name as this book. That year, I (Beverly) was the president of AEA and we (Matt and Lovely) were program cochairs. With the positive feedback we received from conference attendees and our diverse backgrounds, perspectives, and experiences connected to the evaluation field, we decided to write this book. We sought to push ourselves and others to move to another level of depth about what it could possibly mean to engage in visionary evaluation for a sustainable, equitable future. The development of this book has moved us far beyond our starting point in both understanding and action.

## **THE NEXT STORY**

The next story is all of ours. We invite you to engage with your colleagues, community, classmates, friends, family, and us around the ideas in this book. Work with the Visionary Evaluative Principles to make them your own. Keep in touch with us via our website at [www.visionaryevaluation.com](http://www.visionaryevaluation.com).

We are committed to living as Visionary Evaluatives and will passionately join you in pursuing a flourishing future of life and equity for all. Share

with others what you are learning, how you are living, and what you are doing to co-create a future that is sustainable and equitable. It is the interconnections among us all that will help elevate these values above the turmoil of our times and build momentum toward our united well-being.

## ACKNOWLEDGMENTS

We thank the authors of the Sector Visioning chapters of this book who joined us in the artful adventure of positioning their writing in 2030 and connecting with the Visionary Evaluative Principles and living as Visionary Evaluatives. They represent the many colleagues with whom we have worked in multiple sectors who continually inspire us with their dedication to a flourishing and equitable world.

We gratefully acknowledge the decades of work by Michael Scriven that grounds our focus on values as the core of evaluation. We thank him for that significant contribution to the field as well as a grant from his Faster Forward Fund that made it possible for us to build connections among our contributing authors and enrich the overall presentation of this book.

Jennifer Greene, coeditor for Information Age Publishing's series, *Evaluation and Society*, kept us on the path to completion with her ongoing encouragement, her patience with our ever-evolving timeframe, and her feedback on drafts of ideas, then chapters, then a full book.

We are ever grateful to our many colleagues who reviewed portions of the book and challenged our ideas, and to our family and friends who supported us throughout the development process.

—Beverly Parsons, Lovely Dhillon, Matt Keene

## NOTE

1. Learn more about the American Evaluation Association (AEA), its many topical interest groups, and its 7,000+ members at [www.eval.org](http://www.eval.org). At this website, you can also learn more about AEA's connection to the international evaluation community. For more information about the many international evaluation organizations that exist, see International Organization for Cooperation in Evaluation at <https://www.ioce.net/> and EvalPartners at <https://www.eval-partners.org/>.

## CHAPTER 1

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# INTRODUCTION

## **Visionary Evaluatives Co-Creating a Sustainable, Equitable Future**

**Lovely Dhillon, Beverly Parsons, and Matt Keene**

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Welcome to the Anthropocene—a time in which humanity is exerting its influence on all of the earth’s ecosystems. Humans are more interconnected than at any other time. With the addition of digital technology,<sup>1</sup> the significance, impact, and pace of these changes is unprecedented, leading us to new evolutions in our social and natural world.

Many of us are asking: What will the impact be on me, my family, my personal and professional communities, my country, and our world? What role and responsibilities do we have in this new era as individuals, organizations, and countries? How do we make progress on issues that have challenged humanity for generations, and work toward a future of well-being for all?

In this book, we ask you to join us in contemplating these questions and envisioning ourselves as “Visionary Evaluatives” (VEs)—those who utilize evaluative inquiry and a set of VE principles to contribute to a sustainable, equitable future. This approach recognizes the rapid ways in which the world

and society are evolving; the ways in which we can actively co-create progress through evaluative inquiry; and the ways that those conducting evaluative inquiries and those using evaluative inquiry results can join together as VEs to move the world toward a more sustainable, equitable future.

Visionary Evaluatives are guided by these principles:

1. Commit humbly and compassionately to a sustainable, equitable future.
2. Recognize the world as composed of living, entangled systems.
3. Discover, reveal, and respect intersectionalities.
4. Facilitate the transparency and understanding of human values.
5. Learn through iterative action and inquiry.
6. Engage in deep praxis.

The VE approach, described below, centers on values. The approach builds on the belief that humanity's best chance at well-being during the Anthropocene depends on purposeful and disciplined attention to human values.

## **LIVING IN THE ANTHROPOCENE**

Humanity's impact on the earth has become so profound that some have called for the declaration of a new geological epoch—the Anthropocene.<sup>2</sup> The current officially recognized epoch, the Holocene, covers the 12,000 years of stable climate since the last ice age. It is during the Holocene that all human civilization has developed. However, the striking acceleration of humanity's impact in the mid-20th century marks the end of stability. The evidence of the impact envelops us—the creation of a new geological layer on Earth formed in part by sea level rise, climate change, plastic pollution, ocean acidification, population growth, extinction of species, nuclear weapons testing, deforestation, and urbanization.<sup>3</sup>

Although the Anthropocene has not yet been formally defined as a geological unit within the geological time scale, the current informal use of the term has proven to be helpful as scientists, artists, and citizens alike shift beyond seeing the changing conditions of the planet as isolated or disconnected events to recognizing that these and other changes collectively are setting a different trajectory for the earth system on which humans are, at least for the time being, wholly dependent.

Perhaps the Anthropocene began when human capabilities and intentions began to be offloaded to machines, initiating the acceleration of our influence on the world and ourselves. The dramatic change of pace marks a point of departure from the rest of evolution. Until then, the evolutionary

forces of nature had been driving and guiding change on Earth for billions of years. Humans introduced additional avenues of accelerating change, not driven by the familiar forces of the entirety of natural evolution but instead by the force of human values. It is only in recent decades that humans, as a species, have considered and taken action for the co-evolution of nature, humanity, and technology for the equitable and sustainable well-being of the planet as a whole. In fact, currently dominant human societies most often consider humanity as the “whole” in and of itself and nature as only important to the extent it served a purpose for humanity. As a result of the lack of attention to the interdependence of nature and humanity, patterns have emerged in the relationships between human values, actions, outcomes, and visions that undermine the very things that may be most important for human well-being, even survival as a species—water, air, food, dignity, love, life, and connection with one another and nature. As human and planetary interdependence and sustainable boundaries for co-existence are better understood among citizens and leaders alike, humans are recognizing our responsibility for our impact and our future. More and more of us are recognizing our responsibility and potential to rebalance and co-create for a future that serves nature, and in doing so, serves ourselves as well.

Many scenarios are circulating about the future of humanity and the earth. This book engages three diverse scenarios for rich contemplation about the future: the extension of the current trend toward mass extinction; the extreme and rapid advances of all facets of technology, specifically artificial intelligence; and the bringing about of a sustainable, equitable future.

*Scenario 1—Path of mass extinction:* Some declare that humans are on a path toward a mass extinction that is far more significant than any in the history of the Earth. Humans have so damaged the support systems of the earth that natural life is eroding and eventually nature, including humans, simply will not be able to survive. Such a scenario depicts a huge amount of destruction and suffering along that path for both humanity and all life on Earth.

*Scenario 2—Technology and Artificial Intelligence:* A second scenario points toward a technological takeover where life and reality is transformed through the expanse of technology such as artificial intelligence, synthetic biology, virtual existence, and artificial superintelligence (ASI). ASI, the most extreme example of this scenario, represents the emergence of a machine intellect that far exceeds current human cognitive abilities in almost every conceivable way. ASIs could be entities separate from humans or something that some humans attempt to integrate into themselves as they transform and transfer their biological selves into creations aimed at transcending current human limitations. In this second scenario, ASIs and/or enhanced humans will evolve independently of humans, and will

take control of the future of humanity, the Earth, and all life on it. These new technological beings may determine whether humanity, in our current form, has enough value to be worthy of survival.

*Scenario 3—A sustainable, equitable planet:* A third scenario offers possibilities that humans can rein in the move toward Scenario 1 or 2, and shift away from the overpowering and excessive consumption, greed, and dominance that have been expressed through genocide, slavery, and colonization as well as moving away from a focus on constant technological “advancement” without considering the impact on nature and humanity. This third scenario builds on the patterns of nature’s evolution, its right to exist, and also on the rights of all people. In this scenario, humans have the chance to turn internally, focus on values, and share those with others as well as learn of the values of others. In Scenario 3, we are moving in the spirit of a humanity-focused<sup>4</sup> approach which will inevitably lead to care for the planet, nature, and others. It is through this approach that we will be able to create a sustainable planet and a more equitable society.

In this book we encourage putting our energy into co-creating the third scenario while recognizing that the first and second scenarios may be playing out at the same time. We purport that, as we make choices among visions of the future, it is our human values that will guide our future, especially as we work to envision and contribute to it.

## VALUES

Values have been described as trans-situational goals that serve as guiding principles in the life of a person or group (Schwartz, 2011). They emerge from a multitude of diverse relationships found at the nexus of, for instance, other values and related actions, outcomes, and visions. Each person has a unique collection of values co-evolving with, for instance, community, group, and family values and influencing perceptions and experiences. Expressions of values are dependent on context.

While human values have been studied and discussed historically, those discussions have not been in the context of today’s complex world. We contend that values can be understood more deeply, and that they should be more systematically, transparently, and purposefully a part of our decision-making. Given the complexities of accelerating changes for humanity in an unprecedented future, we must attend to how we think about and address the potential need for changes to our values. At the same time, we must humbly acknowledge that even when we have the best of intentions based on our well thought out values, it is dangerous to assume that we can know or even recognize the full range of outcomes for ourselves and future generations that will result from our actions.

These recognitions call for attention to the intersection of planetary changes with social and personal value changes. We consider the time period between now and the year 2030 to be a critical window during which humans have to make collective, wise decisions about the values that they hold and take actions with careful attention to unanticipated and unknowable outcomes in order to bend the trajectory of humanity toward an equitable, sustainable future.

No matter which of the above-noted scenarios, or versions thereof, that the planet is headed toward, in this book we contend that the values of equity and sustainability are worthy of primary attention to give us and future generations a planet that supports well-being for all life. We are guided in our thinking by the statement of the Universal Declaration of Human Rights which begins, “Whereas recognition of the inherent dignity and of the equal and inalienable rights of all members of the human family is the foundation of freedom, justice and peace in the world” (UN General Assembly, 1948, Preamble, para. 1). We are also guided by the recognition that all life, all ecosystems on this planet are deeply intertwined leading to a growing Rights of Nature movement, which asserts, “nature in all its life forms has the *right to exist, persist, maintain, and regenerate its vital cycles*” (Global Alliance for the Rights of Nature [GARN], (n.d.); What is Rights of Nature? (section) para. 2)<sup>5</sup>

In this book, we take the position that values are at the heart of bending the curve of our current planetary trajectory toward a sustainable, equitable future. While recognizing their multiple meanings and expressions, some of which are discussed below, we put forth sustainability and equity as values that are essential to guide us through the Anthropocene.

It is in this context that evaluators and evaluation have a powerful role to play.

## THE ROLE OF EVALUATION AND EVALUATORS

The field<sup>6</sup> of evaluation has a uniquely important role to play because of its connection to values and to systematic inquiry. Evaluation, as a field in the United States, has largely been considered to be the act of looking critically at a social intervention<sup>7</sup> to determine its merit, worth, and significance (Scriven, 2016). The field builds from the natural human activity of holding and acting upon certain values—those beliefs or principles, implicit or explicit, that are important in the lives of individuals or groups. Evaluation as a field is also grounded in the process of systematic inquiry (the basis of many fields, especially in the sciences) but it goes beyond systematic inquiry in intentionally conducting inquiry with certain ethical principles of respect for all people and nature as expressed in the guiding principles of the American Evaluation Association.<sup>8</sup> Evaluation, and its corresponding

components of evaluative thinking and inquiry, is well positioned with systematic approaches to question assumptions and beliefs, test for their existence, and examine relationships between values, actions, and outcomes.

Evaluation, evaluative thinking, and evaluative inquiry mean different things to different people and fields. This book uses these terms in the following ways. Evaluation is a field that looks beyond whether something has happened or not to consider as well the influence of that change or lack thereof. Evaluation utilizes evaluative thinking and evaluative inquiry with a practiced consideration of values, methodologies, and use. Traditionally, an evaluator would collect data, analyze that data, develop an interpretation, and share information about that interpretation. This process would follow a mostly linear pathway, addressing the needs of decision-makers by generating inferences on how well-intended outcomes were reached. The underlying values that guided the thinking about desired outcomes were seldom clarified and, even if they were, rarely made explicit.

Today and into the future, evaluation is evolving in multiple ways to address the complexity of the world, the expanded means and uses for conducting evaluation, and the legitimacy of multiple audiences for evaluation. The significance of the underlying values of what is being evaluated, who is doing the evaluation, who is requesting the evaluation, who is using the evaluation, the stakeholders of the evaluation, and those values inherent in the overall process of evaluation is being recognized in the field, especially as it relates to equity.<sup>9</sup> Similarly, a consciousness of the importance of seeing environmental sustainability as a value that shapes evaluation is rapidly coming into the evaluation field.<sup>10</sup>

Evaluative thinking—a combination of critical, creative, inferential, and practical thinking focused on values and valuing—is essential when considering the difficult and complex issues of the Anthropocene. Everyone engages in evaluative thinking, though to various degrees, in considering issues and events in families, communities, organizations, and the world. This consideration and focus on values at multiple scales, though not nearly acknowledged enough, is at the heart of evaluative thinking.

Finally, there is evaluative inquiry which is a systematic process of using empirically derived and value-based data, as well as evaluative thinking, to move to action related to the issue at hand. People take their learning and integrate it into their work regarding the issue—such as modifying strategies, changing activities, and adjusting goals. For example, there may be systematic inquiry into the homelessness issue in a community through the gathering of information about the level of homelessness compared to other similar cities, having conversations with some of the homeless community members, considering the values that underlie what worked in the past and projecting how those values might apply in the future, and using that data and evaluative thinking to propose legal, health, policy, educational,



and/or other avenues for addressing the homeless issue. Evaluative inquiry helps find potential pathways for change.

Evaluation crosses social sectors and academic disciplines. People across sectors and disciplines use evaluative thinking and inquiry to various degrees. Sectors and disciplines as well as individuals within them may differ in their assumptions about the role of values, the appropriateness of various inquiry methodologies, and the purposes and use of evaluation. Each discipline and sector has its own theories and assumptions about the world as well as their histories of the use of different inquiry methodologies. These differences affect the role evaluators can play or expect to play in addressing societal and environmental issues. In this book we call on evaluators to open their thinking and practices to the breadth of methodologies and theories from multiple disciplines and sectors about how evaluative inquiries are conducted that can inform the links among values, actions, outcomes, and visions of the paths that move us all toward well-being. It is what is needed for these times.

Evaluation, as a field in the United States, has tended to look to the past to see what worked and has assumed that what worked in the past will work in the future. That may be appropriate if the intention is to keep on the same path into the future that we were on in the past. But if as a species we are recognizing that humans are creating conditions that can lead to our very collapse, do we want to continue down that same road? Instead, evaluators and others who engage in evaluative inquiry can use the past to help humanity understand what needs to be changed while working to design a future that includes respect for the well-being of all people and nature. The understandings derived from inquiries of the past about the complex interplay of values, actions, and outcomes can be projected wisely and carefully to map out a new path guided by a vision of a different future. In this book, that future is framed as equitable and sustainable for many generations of life to come.

The belief that evaluators and the values that they hold should be (and can be) distanced from the evaluative inquiry process is another important belief of many evaluators relevant to this book and our concept of VEs. In this book, we take the opposite position—that evaluation practitioners and users of evaluative inquiry should, with conscious attention to their values and those of others, be far more personally connected to, aware of, and active in their roles; that more methodologies should be considered; and that a broader spectrum of sectors and individuals should collaborate in considering the pervasive issues of the Anthropocene.

Those involved in evaluation, as well as all of humanity, cannot approach the future with the same mindset that has gotten us to this dangerous position. That mindset has been one of assuming that change happens in a steady linear way, and that a command-and-control approach focused on efficiency and optimization for human benefit, especially for those with power, is the primary, if not only, goal.

A different mindset is needed, one that recognizes our impact on nature and the planet as well as other societal evolutions that are upon us—increasing interconnectedness, significant and growing levels of inequity, greater complexity of systems, and ever-present and changing technology. This mindset must include the interdependence of values; be one that recognizes the importance of others, including other species; and recognizes the natural planetary boundaries within which we must work. The mindset additionally recognizes that we need the wisdom, innovative capacity, humility, and compassion that comes from explicit attention to the intersections of sciences, humanities, arts, cultures, and nature.

We need approaches that move toward flexibility in and learning from both social and ecological systems to give us the ability to deal with the turbulence of global changes. We need to be persistent in shifting toward a world that becomes more robust and resilient with the shocks and allows us to support one another for our mutual well-being and health. We must think and act innovatively to rise above crises while also adapting to inevitable change. We must rediscover, maintain, and unearth old ways that have worked, and invent new systems that use boundaries, interrelationships, and perspectives that are a better fit for the future we want than those that have dominated, and desecrated, much of the world today.

We believe that the challenges of the times in which we live require a new and rapid evolution in evaluation. We believe we all must work together in order to find ways to allow us to sustain humans and nature. We propose a new evolution—the Visionary Evaluative.

## VISIONARY EVALUATIVES

Visionary Evaluatives are people who recognize the shifting state of the world and believe that they have a personal and professional responsibility to contribute to creating a sustainable, equitable future through the use of evaluative inquiry. We are using the term *visionary* to emphasize our respect for the needs of both current and future generations, with special consideration for the social and natural environments in which future generations will live. Visionary also emphasizes the need for innovative and creative thinking to give an aspirational direction, a vision, of where we are seeking to go.

Anyone can become a VE. This way of being is available to anyone who wants to use the processes of evaluative thinking and inquiry to study and constructively address important social-ecological systems utilizing the Visionary Evaluative Principles (VEPs). It is an integrated way of living that connects people, communities, organizations, disciplines, and sectors. It is a way of living during a time when the very existence of our planet and people is threatened. It goes beyond moving in the world in an isolated

state, or just with our family, friends, culture, workgroup, or other personal or professional circles. This way of being recognizes that all in the world are bound together and that the more deeply we move in a VE way, the more we will all have a sustainable, equitable future.

The VE recognizes that evaluative inquiry is not the sole domain or responsibility of one group (i.e., evaluators), but rather an active, co-creative process involving those conducting evaluative inquiries and those using the results of those inquiries. Users are inclusively conceptualized to include all evaluation stakeholders. Visionary Evaluatives co-create useful evaluative knowledge, facilitating and ensuring both the usefulness of the evaluative inquiry and its action-ability throughout the process. Evaluators still play a unique and important role in a VE world. They are deeply immersed in the evaluation field, having expertise in methods, values, and use, that allows them to provide relevant evaluative perspectives, experience, and techniques.<sup>11</sup>

Evaluators and evaluation users differentially engage in roles in the back and forth between action and inquiry. The evaluation user is more focused on carrying out actions and the evaluator is more focused on the inquiry process itself. They support one another in their shared purpose of, and active involvement in, contributing to a sustainable, equitable future. In sharing their perspectives and experiences, they use the evaluative inquiry process to push one another's thinking, and they keep one another on the VE path.

Being a VE is a way of intentionally, mindfully, rigorously, emotionally, and creatively moving through life guided by the intentional exploration and application of values that support a sustainable, equitable future. It is about integrating these values in VEs' personal and professional lives. The complexities of a sustainable, equitable future are ever present. Visionary Evaluatives are actively, consciously, and transparently aligning their lives to their work and their work to their lives so that all of their actions support an evolution toward a future that is sustainable and equitable for all living beings and for our planet.

## **Visionary Evaluative Principles**

Visionary Evaluatives are guided by certain principles that we refer to as fundamental Visionary Evaluative Principles (VEPs).<sup>12</sup> Visionary Evaluatives integrate these principles in their daily personal and work lives as they use evaluative inquiry to co-create a sustainable, equitable future:

1. Commit humbly and compassionately to a sustainable, equitable future.
2. Recognize the world as composed of living, entangled systems.

3. Discover, reveal, and respect intersectionalities.
4. Facilitate the transparency and understanding of human values.
5. Learn through iterative action and inquiry.
6. Engage in deep praxis.

Many people currently use one or more of these principles to different degrees, in different ways and combinations, and at different times. We present them to be used together, with intentionality, in the evaluative inquiry process, as a powerful personal and professional approach to creating a future that serves humanity and nature.

***Visionary Evaluative Principle 1: Commit Humbly and Compassionately to a Sustainable, Equitable Future***

Visionary Evaluatives have a commitment to the values of sustainability and equity. They prioritize these values in every situation with humility and compassion, recognizing that their own knowledge is inevitably limited and that situations are dynamic. That is, VEs know that in prioritizing these values, the relationship with other values are impacted, often unpredictably, lifting some and subordinating others. Visionary Evaluatives further recognize the depth of complexity of these values, and know that their and others' understanding of equity and sustainability may differ depending on how communities experience inequity and a lack of sustainability.

First, let's look at equity. Equity means many things to different people. In this book, we employ the concept of equity to mean aligning a belief in equality with mindful actions that lead to equitable outcomes. Equity entails, therefore, considering both if people are provided with access and opportunity to participate fully in society, while carrying with them the beauty of their differences, and also considering if the results of their participation and inclusion reflect outcomes that are fair. Visionary Evaluatives regularly and honestly consider their roles in equitable outcomes—in how they treat and interact with others, in their actions and inactions, and the resulting impact on increasing or decreasing equity. Visionary Evaluatives make space for these differences and find ways to be inclusive that may feel unfamiliar and uncomfortable, and which may require unanticipated and challenging changes in their own actions.

Aligning actions with a commitment to the value of equity takes a considerable amount of reflection, open-mindedness, cultural competence, learning, resources, and, at times, creativity. For example, a university, in aspiring to equity in college admissions, may convene a diverse group of stakeholders to consider if all applicants have equal access to apply (e.g., waiving application fees when unaffordable, recruiting in underrepresented communities); if the university is utilizing application criteria that are fair (e.g., culturally inclusive testing); if they are allowing people from diverse backgrounds to

provide insight on the application process and are integrating that input (e.g., regarding gender identity questions); if they are reaching out to communities that are underrepresented (e.g., rural communities); if they are allowing people to apply in creative ways (e.g., artists); and, finally, determining if the results of their collective admissions processes are an equitable reflection of our nation's vast, diverse communities. In evaluating whether the outcomes are equitable, the university may want to look at whether the efforts have actually resulted in better representation; it may undertake efforts to find out how applicants experienced the process and what encouraged or discouraged application; and, in being true to its value of equity, the university may also consider factors seemingly outside of the admission processes such as course offerings, student organization leadership, and retention of a diverse student body. Equity is considered every step of the way—from intent to action (or inaction) to outcome—and it is a complex series of value assessments along that path. Visionary Evaluatives believe in the investment necessary for equity and believe that in supporting equity, they give all of us the opportunity to live life as our full, best selves.

Similar to equity, the process of defining, describing, and supporting sustainability can be a challenge. In referring to sustainability in this book, we are referring to it in the context of and relationship with nature and the environment rather than the sustainability of a program, practice, organization, or a type of development. Early attempts to define sustainability assumed that stakeholders had a shared view of an acceptable standard of living and that capitalism and free markets were the systems within which sustainability initiatives should be defined and deployed.<sup>13</sup> They assumed that it was possible to determine and predict acceptable rates of natural resource depletion that would maintain or improve standards of living for humans for both present and future generations.

We now know that these assumptions underpinning descriptions of sustainability are a poor match for the current conditions of the world. For example, capitalism as currently practiced creates a mandate for perpetual growth that requires incessant, and at times, irreverent consumption of nature through systematic physical degradation of nature, introduction of synthetic materials, and extensive extraction of substances from the earth's crust. It also creates and strengthens structural obstacles to many people's health, influence, and expression of values. To thrive and survive, humans and other living beings require natural resources such as air, water, and land that humanity and its dominant economic systems are destroying.<sup>14</sup> Further, we cannot predict much about future generations and the world within which they will live, and our past focus on an economically based definition of sustainability may not be the currency in a future in which preserving the wonder of nature and its life-giving role may become infinitely more valuable. The Rights of Nature movement, which has been gaining

prominence in the 2000s, recognizes that the well-being of human society and the human economy is interdependent with, if not ultimately wholly dependent upon, the well-being of nature. If nature fails, so do we.

In this book, we present and position sustainability and equity as complex human values that emerge from the nexus of relationships between values, actions, outcomes, and visions. Both equity and sustainability are values that cannot be untangled, isolated, and set apart from these relationships, but instead necessarily draw in all life, humans, technology, and all else that humans have created.

The combined values of equity and sustainability are an organizing force and a process, not a condition or state, that look different from all angles, for each person, at each moment and cannot be predetermined or measured against predictions. They are values that must be collectively sensed, described, and assessed in the present and used to organize and instruct for the well-being of all life. Although all of these definitions can help us understand and take action that supports equity and sustainability, at the core, it's not the definitions themselves that matter but rather the recognition that equity and sustainability are values that we individually and collectively can choose and intentionally apply in our lives. Equity and sustainability are values, not rules.

Visionary Evaluatives, in embracing the values of equity and sustainability, recognize that a commitment to both is not just for a certain situation, time, context, or circle. Values, all values, will change over time, in different situations and contexts, and with different circles. Additionally, the ways in which values interplay with one another create even more complexity. Visionary Evaluatives in their commitment to values, especially those of equity and sustainability, realize this, and in their recognition, they nevertheless work mindfully to use evaluative inquiry to understand their values and those of others and to ensure that their values permeate their daily lives—in their work, in their social life, in their buying and investing choices, in what they read, in their friendships, in their community involvement, in the policies and candidates that they support, and in every aspect of how they move in the world. Visionary Evaluatives, therefore, are always considering the intersection of their values, actions, and impact. They also consider the long term and systemic impacts rather than just the impacts that are immediately discernible. Further, VEs look not only at the impacts that are intended but also investigate unintended and difficult-to-see consequences.

### ***Visionary Evaluative Principle 2: Recognize the World as Composed of Living, Entangled Systems***

Visionary Evaluatives recognize that every issue is part of entangled, living systems. They recognize that the systems are plentiful, nuanced, networked, messy, beautiful, and most especially, living. Visionary Evaluatives move from looking at a particular issue in linear, isolated, and static ways

toward seeing that issue in the larger, interdependent, and constantly shifting and evolving systems in which it exists. Visionary Evaluatives also know that an evolving issue often forms discernible patterns within an entangled, living system. Issues emerge and may mature, thrive, flourish, be threatened, rebalance, adapt, evolve, die, and/or re-emerge. The goal is not to sustain the intervention, organization, and/or system, but to allow for the transformation of the social and ecological patterns in which an issue exists toward a more sustainable, equitable future.

Similarly, VEs recognize that people and nature are all linked; we are an entangled web of life that relies on one another with increasing frequency and need. Indeed, issues do not relate to or reside in solely one social unit of life, for example, a social sector such as business or education. Rather, units intersect as do we with each other, and with other communities, other organizations, nature, and technology.

***Visionary Evaluative Principle 3: Discover, Reveal, and Respect Intersectionalities***

The recognition of entangled, living systems leads naturally into seeing the intersections of choices, evidence, actions, information, values, and biases. Visionary Evaluatives realize that actions affect multiple sectors, power, and cultures, none of which operates in a vacuum, but are interconnected and often deeply entrenched. Visionary Evaluatives search for those intersectional points, reveal their existence, and share their impact. When possible, and through collaboration with others, they unearth ways to release the oppressive forces that may lock them into place while still appreciating and respecting the hold they have on systems and the impact they have on people and nature. Rethinking the traditional boundaries of sectors, power, and cultures opens up new ways of thinking and acting to address the pressing issues the Anthropocene triggers. It also allows new opportunities for change as we continue to address our longtime social and environmental issues.

***Visionary Evaluative Principle 4: Facilitate Transparency and Understanding of Human Values***

Visionary Evaluatives realize that people will have differing understandings of and commitment to sustainability and equity and that the role of VEs, in part, is to hold that tension and facilitate conversation and joint collaboration toward increasing the transparency and understanding of human values.

Visionary Evaluatives are both attuned to values (their own and those of others) and actively increase awareness and conversation about them. Visionary Evaluatives also recognize that multiple values will be present and that many will intersect and some will conflict. They know that choices may need to be made regarding which values are most vital to the work at a given

point in time and in a particular situation. Visionary Evaluatives participate in processes to determine the values that are to be prioritized and engage stakeholders in dialogue about the implications of various actions. They ensure that the prioritized values are integrated and reflected.

***Visionary Evaluative Principle 5: Learn Through Iterative Action and Inquiry***

Visionary Evaluatives move through their evaluative inquiry knowing that their purpose is beyond undertaking a study of the facts, an intellectual exercise, or a well-articulated report. Rather, VEs are continually engaged in iterative learning. Visionary Evaluatives utilize the evaluative process as the basis for action that, like a living, flourishing evolving system, can benefit from ongoing feedback, learning, iteration, and adaptation. Visionary Evaluatives—throughout the process of considering an issue, engaging in study and fact-gathering, analyzing and making meaning of what they find, and sharing their learning throughout this process—ask themselves how their work and way of being can help lead to strategic action.

***Visionary Evaluative Principle 6: Engage in Deep Praxis***

Visionary Evaluatives go beyond the basic form of praxis—where theory informs practice and practice informs theory—to a deeper praxis in which they seek to integrate creative actions, inquiry, theory, and learning, with all anchored to their guiding values and the future. Deep praxis, similar to concepts of deep ecology,<sup>15</sup> does not see the world as a collection of isolated events or objects but rather a network of fundamentally interconnected, intertwined phenomena. Visionary Evaluatives are actively and communally engaged in deep praxis, iteratively learning and evolving theory, practice, and evaluative inquiry to fit the situation in which they are participating. Visionary Evaluatives, reflecting different perspectives, values, and sectors, come together and also engage with others in ongoing conversation and reflection, all the while synthesizing learning and applying that learning and wisdom to the next action. Visionary Evaluatives bring together the other five VEPs in their praxis. They continuously consider how the values of equity and sustainability relate to other values. Visionary Evaluatives weave these principles together in all phases of their work and life.

## **Being and Becoming Visionary Evaluatives**

This book was written with a belief in these VEPs. Indeed, through the process of writing and rewriting this book, we evolved in our own journeys toward understanding, trying out, and embracing the depth of what these principles mean and what it means to live as VEs.



We believe that there is no greater time in which VEs are needed than now. As current and potential evaluation practitioners and users evolve into VEs, they become a community that prioritizes equity and sustainability; uses an entangled, living systems lens; discovers and navigates intersectionality; believes in engaging with and being transparent about values; learns through iterative action and inquiry; and embraces deep praxis. Through embracing the VEPs, VEs will be an active part of co-creating a future that is sustainable and equitable for humanity and nature.

## **BOOK FORMAT**

This book is divided into 15 chapters with the Introduction and Conclusion set in current time, and the intervening chapters presented as a story that takes place in 2030. This format and storyline provide a creative opportunity for considering possible trajectories of our current paths and for delving into design and visionary thinking for the creation of a sustainable, equitable future. While written as a story, the chapters in the “Sector Visioning” portion (Chapters 4–12) can be accessed in any order and combination. This book is written in a manner that allows readers to access the book for entry points that meet the readers’ styles and interests. Taken together, this book will, ideally, provide the reader with theoretical and concrete pathways for understanding how VEs would move in the world and utilize the VEPs to address societal and ecological issues.

### **Chapter 1. Introduction: Visionary Evaluatives Co-Creating a Sustainable, Equitable Future**

This introduction, focusing on the Anthropocene and emphasizing a shift toward equity and sustainability, provides the temporal context into which VEs arise. It reviews key information about evaluation and evaluative inquiry, introduces the concept of “Visionary Evaluatives” and the principles they follow, and provides a roadmap for the book.

### **Chapter 2. Visionary Evaluatives’ Perspectives Part 1: A Conversation About Humans, Nature, and Technology**

In Chapter 2, written as a screenplay set in 2030, our story begins. Eight highly influential and well-regarded VEs have been charged by a congressional committee to present a VE perspective at an upcoming United Nations Global Forum on ASI. The chapter consists of excerpts from conversations

about their upcoming contribution to the Global Forum. They grapple with perspectives that are diverse, open, nuanced, and challenging. They begin by considering the world into which ASI may arrive, emphasizing patterns and trends that are impacting the health of social-ecological systems. However, as they endeavor to understand the potential for a future of well-being, the VEs are forced to turn inward to examine humanity's and their own capacity to understand the relationships between values, actions, outcomes, and a vision of a sustainable, equitable future. Verbal and visual exchanges set off explorations of the infinitely diverse collections of intersections shaping the Anthropocene, created by worldviews, social movements, governance, economic systems, genetics, art, memory, and more. As they sense more blind spots in their conversations, they look to include the perspectives of other VEs.

At the end of Chapter 2, the group prepares to spend the next day and a half reviewing deep praxis materials (Chapters 3–13) curated by Zindzi, the lead librarian of the Deep Praxis Library.

### **Chapter 3. Visionary Evaluative Principles: Deepening Understanding**

Chapter 3, also set in 2030, is the transcript of a conversation between Zindzi and Omar. Zindzi had spent most of her career prior to 2020 conducting evaluative inquiries for government, nonprofit organizations, and private foundations before being introduced to the concept of VEs. For over 10 years now, Zindzi has served as the lead librarian of the Deep Praxis Library. For VEs, deep praxis is the process of integrating creative actions, evaluative inquiry, theory, and learning into one's work and life with a humble and compassionate commitment to a sustainable, equitable future.

Omar, a former evaluator who left the evaluation field in the late 2010s, is considering rejoining the field, and is intrigued by the VE approach which aligns with his own values. In the conversation, Zindzi and Omar delve into the VEPs with an emphasis on the perspective of an evaluation practitioner.

At the end of Chapter 3, Zindzi asks Omar to review the "Sector Visioning" materials (Chapters 4–12) that she has put together for the VEs described in Chapter 2. She and Omar will reference these materials in their subsequent conversation, captured in Chapter 13.

### **Chapters 4 Through 12: Sector Visioning**

Chapters 4 through 12 are framed as "Sector Visioning" chapters which are curated materials from the Deep Praxis Library. They are written by people who are part of "praxis quests" in a variety of sectors and provide insight and information as to how these sectors have been evolving from

2020 to 2030 to address changes in the world, especially in consideration of the values of equity and sustainability.

The “Sector Visioning” chapters focus on: Social Protection, Nature, Law, Business, Health, Financial Investing, Transportation, Education, and Design. These sectors have not been chosen to signify those as the most important but rather serve to exemplify how VEs can transform sectors to intentionally change the trajectory of human history toward a more sustainable, equitable future. The authors of these chapters position themselves in 2030, and discuss some important actions, perspectives, and inquiries of VEs in their sector.

As the “Sector Visioning” authors project into 2030, they consider the ways in which their sectors are learning, adapting, transitioning, and transforming toward better situations for people, place, and planet. These chapters provide the reader an opportunity to think about how what they are learning from the sectors plays into their own VE approach.

In engaging with multiple disciplines, we hope to stimulate new conversations, learn from other sectors, and share expertise from our varied fields, experiences, and perspectives.

## **Chapter 13. Visionary Evaluative Inquiry: Moving From Theory to Practice**

Chapter 13 is a transcript of a second conversation between our two characters, Zindzi and Omar, introduced in Chapter 3. In this conversation, Zindzi and Omar discuss how a particular approach to deep praxis, referred to as “Praxis Quests,” is used to deepen any and all aspects of the evaluative inquiry process. In the term *praxis quest*, the word “quest” captures the notion of praxis being an ongoing search, exploration, and discovery. It involves engaging in praxis, refining a praxis, finding fit-for-purpose behaviors, adaptations, states of being, and more. It engages VEs across sectors and disciplines in a process of continually “becoming” both in one’s life and work through a focus on evaluative inquiry. Being and becoming a VE is a journey of reflection and supportive engagement with others.

In their conversation, Zindzi and Omar frame their conversation around four basic phases of evaluative inquiry: (a) positioning and designing the evaluative inquiry; (b) data collection, compilation, and credibility; (c) meaning-making (e.g., illuminating the link between data and strategic action); and (d) shaping action and practice. They consider how each phase (or as they say, “arena”) of evaluative inquiry can be thought of as encompassing the whole of the evaluative inquiry process and the whole of the VEPs.

## **Chapter 14. Visionary Evaluatives' Perspectives Part II: A Conversation About Creating a Future of Well-Being**

Chapter 14 returns to the eight VE leaders from Chapter 2 who are preparing for the ASI Global Forum. They have now reviewed the “Sector Visioning” materials and the transcripts of the conversations between Zindzi and Omar. In Chapter 14, they reconvene to reflect upon what they have learned. Here, they discuss the roles, competencies, and responsibilities of VEs; threats to evaluation and evaluators; the relationship between the VE and evaluation; the origins and properties of values; and notions of a truly effective humanity. Finally, just as they seem to be honing some of their most critical contributions to the forum, they are blindsided by a crisis of understanding and opportunity and forced to question their fitness for the task they’ve been given.

## **Chapter 15: Living as a Visionary Evaluative**

The conclusion of this book moves back to where we began—the present day—with a practical call to action for those who want to move in the direction of being VEs in order to create a sustainable, equitable future. The conclusion provides a checklist-style framework for testing the use of the VEPs as you consider what it is like to be a VE in the Anthropocene.

### **CONSIDERATIONS FOR THE READER**

This book reflects our own values, especially those of equity and sustainability, and a belief that values, evaluative inquiry, visioning, interconnectedness, collaboration, action-ability, and praxis can be a source of hope for the future. In writing this book, we worked closely with our “Sector Visioning” chapter authors and with each other. We facilitated a series of webinars,<sup>16</sup> which provided an opportunity for creative cross-sector discussion and collaboration and, as co-editors, we engaged in conversation nearly every week for over four years in an effort to evolve the book into one that captured the myriad of changing impacts on our world and potential approaches that VEs can use to influence those impacts toward a more sustainable, equitable future. It was a challenging and enjoyable process that deepened our thinking, gave us a renewed sense of the potential of evaluative inquiry for the times in which we live, and, we hope, enhanced the book’s value for the reader.

There are a few things the reader may want to consider. This book has a United States focus given our deep knowledge of this community. However, we view the United States as an integral part of the world whose actions,

cultures, and perspectives affect the world, and vice versa. We, as well as our “Sector Visioning” chapter authors, have incorporated this orientation in our thinking and writing. We suggest that readers read through the United Nations Sustainable Development Goals (United Nations, 2018) which provide a complement to the values and perspectives reflected in this book. We further believe that the opportunities for being and moving in the world as a VE extend beyond our borders, and that the implications and call to action we provide to U.S.-based evaluators may be adapted by evaluators in other nations with careful attention to their particular context.

Our goal in writing and curating this book is to provide pathways for moving through the Anthropocene that recognizes our interconnectedness and interdependence across sectors, organizations, communities, and cultures. Evaluative thinking and inquiry are essential means by which all can consider the ways that we play a part in impacting people, place, and planet through the actions of our organizations, our institutions, our communities, our families, and—most importantly—ourselves. Evaluation practitioners and users cannot stay on the sidelines but rather must be an active, engaged, and self-reflective part of bringing to life the vision of an equitable, sustainable future for the well-being of all.

We hope that this book can be used as a resource that not only provides information and ideas for action and evaluative inquiry but one that also provides readers with ways that they can consider, learn, and iterate as they read through the book.

This book was a challenge for the three of us as we explored and challenged our own values and as we integrated our thinking, experience, and backgrounds personally and professionally. We evolved as we wrote this book. We became more deeply aware of the issues of each of our sectors, cultures, communities, identities, and histories. We also learned to not just consider our values of equity and sustainability remotely but to integrate both deeply into our daily work and lives.

Evolving is never easy—personally, organizationally, as a community, nation, species, or even planet. It is often scary as it can feel that something of us is being lost, perhaps our very selves. Evolution, however, is not only inevitable and necessary for all life but it is also a beautiful form of growth. We hope you enjoy the journey.

## NOTES

1. We use digital technology (also referred to as digital and/or online media/platforms) to refer to technology publicly introduced around the mid-1900s that creates, stores, processes, and/or communicates data such as computers, social media, artificial intelligence, and so forth. Hereinafter referred to as “technology.”

2. See the Subcommittee on Quaternary Stratigraphy Working Group, a constituent body of the International Commission on Stratigraphy, the largest scientific organisation within the International Union of Geological Sciences. See <http://quaternary.stratigraphy.org/working-groups/anthropocene/>
3. See <https://www.nature.com/articles/415023a>
4. We are using the term “humanity-focused approach” to mean emphasizing compassion, kindness, love, and other life-enhancing ways of being.
5. See <http://therightsofnature.org/what-is-rights-of-nature/>
6. We use the term “field” when referring to evaluation as a disciplinary subject and evaluation as a “profession” when referring to its practice as part of an industry.
7. A social intervention is something that is intended to improve the human condition.
8. See [www.eval.org](http://www.eval.org)
9. See The Center for Culturally Responsive Evaluation and Assessment (CREA), a highly collaborative and well known evaluation organization that brings together evaluation practitioners, users, academics, and others to continually enrich understanding of the meaning and practice of equity in evaluation. Other sources for deepening an understanding of equity and evaluation include the Equitable Evaluation Initiative and the AEA statement on Cultural Competence in Evaluation.
10. The application of the value of nature-focused sustainability in the evaluation field does not have as long a history as equity. Historically, it has been heavily intertwined with sustainable development and international issues. To understand more about this history, see the Environmental Evaluators Network, *Blue Marble Evaluation* by Michael Quinn Patton, United Nations Development Programme, Global Environmental Facility, and *Evaluating Environment in International Development*, edited by Juha Uitto (2014).
11. These are explored more fully in Chapters 3 and 13 of this book.
12. The VEPs are discussed further in Chapters 3 and 15 of this book.
13. See, for example, the 1969 National Environmental Policy Act and the 1987 Brundtland Report, *Our Common Future*.
14. See <https://thenaturalstep.org/approach/>
15. The term “deep praxis” parallels the term “deep ecology” that “recognizes the fundamental interdependence of all phenomena and the fact that, as individuals and societies, we are all embedded in (and ultimately dependent on) the cyclical process of nature” (Capra & Luigi Luisi, 2014, p. 12).
16. The webinars, as well as other aspects of this book’s development, were supported by a generous grant from the Faster Forward Fund which strives to advance the practice and profession of evaluation.

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