

## **Special online resource for Utilization-Focused Evaluation, 5<sup>th</sup> ed**

### **Getting to Maybe Workshop Resource**

#### **Social Innovations and Adaptation**

Michael Quinn Patton

in collaboration with Frances Westley and Brenda Zimmerman

Inquiring into adaptation and evaluation of social transformations, and the experiences of social innovators, one set of questions inevitably led to another set, and then another. At the beginning we asked how social transformations start and tried to unravel the role of social innovators in “getting to maybe.” We followed what happens as social innovators encounter larger social forces, experience the surge of momentum, and face the possibility of failure. Never a straight line from the crisis-forged idea, the determination that change must be possible, and defiantly daring to hope, we’ve followed the ups, downs, overs, and arounds of social innovators, watching with them for tipping points and struggling to understand what it all means, we were drawn inexorably to the question intrinsic to the very idea of social transformation: What happens over time? How do social transformations evolve and adapt? How does evaluation support adaptation? The story line inheres in the very notion of transformation – some social condition existed, was experienced as intolerable, was attacked, began to yield, momentum built, significant change occurred (significant enough to attract attention, certainly our attention, as we sought cases to examine and learn from), and some degree of success emerged. Things are different than they once were. What’s this like for those who have devoted themselves to fostering change? What role does evaluation play?

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**We found this question embedded in the cases of social transformation we studied. Just when things seemed to be going well, we noticed, social innovators often encountered their greatest obstacle: “success”. When a small initiative suddenly tips into a huge success, those involved face anew the dynamics of power, control, and letting go in ways for which they are not necessarily prepared.**

For Bob Geldof, success meant being catapulted to a whole new arena, a highly political one in which he had to find his way. For Paul Born it meant an effort to “roll out” his formula to multiple communities across Canada, no small task. For Mary Gordon, success has meant finding the right training forward to ensure proper replication of her programs. For Jeff Brown it meant a ten-point program that could be taken to other cities and a deep and deliberate standing still to understand the essence of what had allowed him and his group to succeed in Boston.

In all these cases, social innovators found that dynamics or interactions at one level generated a whole different set of dynamics at another level and required rethinking, at a fundamental level, their original purpose – indeed, a reassessment of all the core elements of social innovation. For some, success can be paradoxically demoralizing, as disorientating as facing failure. Indeed, more so, because these leaders are prepared, even determined, to fight on in the face of failure, but what does one do in the face of success?

Successful social innovation is not a “fixed address” that can be arrived at and the burdens laid down. For the kinds of intractable problems that we are dealing with in this book, success is always only a moment in time, from which point the other elements of social innovation that we have discussed here must be reconsidered. Understanding the

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forms and the dynamics of success as well as the potentially distorting pull of success on mission is key to sustainable and ever-adapting processes of social transformation.

**Hearing the outcry and the birth-cry of new life at its term**

In 1980 Candy Lightner's twelve year old daughter, Cari, was killed by a drunk driver -- a repeat offender. Brought to trial, the driver was given a slap on the wrist and released. Lightner at the time was a realtor in Sacramento, California. In her 1990 memoir she wrote: "I promised myself on the day of Cari's [death](#) that I would fight to make this needless homicide count for something positive in the years ahead."

One can imagine many grief-stricken parents making such a vow. Candy Lightner was certainly not the first mother to be outraged about lenient drunk driving laws that returned chronic drunks to the streets, putting yet more children at risk. The statistics were already well known and widely publicized. Drunk driving was the major cause of traffic fatalities in North America. In fact, it remains the single largest criminal cause of death in Canada. In 1994, there were 700 homicides in Canada. In comparison, there are approximately 1,500 fatalities as a result of impaired driving each year. The death rate from impaired driving is two to three times higher than Canada's national murder rate. The situation is worse in the United States. [Statistics can be back-dated, updated and expanded.]

Following her daughter's death, Candy Lightner founded Mothers Against Drunk Driving (MADD). During the eight years she headed MADD, she built the organization from a one-woman crusade into a worldwide movement. She began by writing to

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newspapers, getting on radio and television shows, giving speeches, seeking out other mothers whose children had been killed by drunk drivers, and organizing demonstrations. She formed a network of survivors of alcohol-related crashes to campaign for victim's rights, engage in legislative advocacy, form local grass roots organizations, and call attention to the contributions that women and children can make in bringing about meaningful and substantial social change.

The goal of MADD was to reduce drunk driving traffic fatalities and the organization has been highly effective in raising public disapproval of drunk driving. The proportion of traffic fatalities that are alcohol-related has dropped 40% over the last quarter century. Most observers give substantial credit for that decline to the efforts of MADD. Release of the 1993 Fatal Accident Reporting System statistics revealed that alcohol-related traffic deaths had dropped the previous year to a 30-year low; the federal agency NHTSA credited MADD along with tougher laws. In 1984 MADD released results from its second year-long Gallup survey on drunk driving, which showed the public becoming increasingly less tolerant of drunk drivers and more supportive of stiffer penalties.

Today MADD's effect is felt with chapters in all fifty states, all Canadian provinces, and many international affiliates. Its goals are to educate, prevent, deter and punish. It has caused judicial reforms throughout the United States. MADD helps victims, monitors the courts, and works to pass stronger anti-drunk driving legislation. With a worldwide reputation for vision and effective action, today's MADD enjoys unprecedented success as a charitable organization. What began with anger and a broken

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heart has developed into an association of more than 600 chapters, two million members and supporters, with net assets of US\$23.5 million. Since its start in 1980, more than 2,300 anti-drunk driving laws have been passed (NHTSA 1996). In a 1994 study by the *Chronicle of Philanthropy*, MADD was the most popular non-profit cause in the U.S.. It ranked second among the most strongly supported charities and third on the most credible list. MADD reports that people continue to contact the organization to request guidance in establishing their own grassroots organization.

But along the way, MADD lost Candy Lightner. She left in a highly visible and widely publicized display of anger and disgust from the organization that she herself created and served as founding president. Officially, she left because MADD changed its goals. "It has become far more neo-prohibitionist than I ever wanted or envisioned," she has explained. "I didn't start MADD to deal with alcohol. I started MADD to deal with the issue of drunk driving." She believed that if MADD really wanted to save lives, it would focus on going after the real problem drivers. Her departure spawned rumors that she, herself, had been arrested for drunk driving, an allegation that has proved as false as it is hard to stop from circulating. The organization has moved beyond its founder. Some charge that it has become a prohibitionist organization. In the early years of MADD's greatest policy successes, drunk driving became defined in the U.S. as driving at the .10 BAC level. That is now being re-defined down to .08. At least five states have attempted to lower that definition of drunk driving to .05. Doris Aiken, the founder of MADD's sister organization, Remove Intoxicated Drivers (RID), wants to lower the level to .04. Exploiting the tragedies of September 11, the RID leader charges that "Drunken

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drivers are the terrorists of the road." There is now a move in Vermont to define drunk driving at the .02 BAC level. What's the ultimate goal? MADD's Tina Pasco asserts that "The only safe amount when you are mixing drinking and driving is zero -- double zero. No alcohol."

Those who oppose this prohibitionist focus, including Candy Lightner, argue that it is misguided and ultimately ineffective. No one should drive after drinking, but defining drunk driving as driving after using mouth wash is counterproductive and impractical and a waste of limited resources. Zero tolerance isn't working in schools [9](#) and it won't work on the highways, they insist. ([Zero Tolerance](#).) They assert that most alcohol-related traffic deaths occur when other important causal factors are present, such as using a cell phone, fatigue, drug use, inexperience in driving, road rage, speeding, poorly lit roads, and failure to use safety belts. [10](#) And, of course, most traffic fatalities don't involve any alcohol at all. If MADD really wanted to reduce traffic fatalities, they argue, it would also care about these major causes of traffic deaths. MADD is no longer a safety-promotion organization, they complain, but an anti-alcohol organization. These charges are but one example of the antagonism MADD's success has spawned. A web search will turn up anti-MADD cyber-sites attacking MADD for greed, corruption, lack of integrity, opportunism, using junk science, lies, selling out, overpaid staff, unscrupulous fund-raising tactics, mission drift, mission-too-narrow, and so on and so forth. Thus do successful social innovations find themselves in an ongoing and never-ending battle with supporters and opponents about what their mission is and ought to be, and how they ought to operate.

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MADD faces new challenges around its mission and focus. MADD is focused on the demand for justice or vengeance on the group that took the lives of friends and children. This warrants harsh punishment, whether or not deterrence is achieved. It also leads to rejection or a lack of enthusiasm for policies that promise to save lives of crash victims without regard for the cause of an accident. A case in point. Widespread concern has emerged that using a cell phone while driving may cause more traffic fatalities than driving drunk. But when a MADD official was asked how traffic fatality statistics involving cell phone use compared to those involving drunk drivers, he tellingly replied "I have absolutely no idea, nor do I care." (source: [7 http://www.alcoholfacts.org/Note7](http://www.alcoholfacts.org/Note7)) The issue for MADD is not longer preventing auto accidents but preventing drinking. **In taking this position does MADD demonstrate the discipline of a focused mission, or a resistance to change that threatens to marginalize it in the future?**

The story of MADD offers rich data for reflection on and learning about the nature and consequences of successful social innovation. The organization itself has been reflective about its success, concluding that successful organization social innovation requires much more than desire, anger, or a broken heart. As part of a strategic planning process as MADD entered "a third decade of changing lives, public opinion, and public policy," leaders identified key elements from its past that helped it become a force for change. These invaluable lessons learned along the way include:

- [Enlist a charismatic and tireless spokesperson](#)
- [Choose a name that is catchy or symbolic](#)
- [Develop a simple mission statement](#)

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- Enlist a financial and emotional mentor
- Recruit enthusiastic volunteers
- Cultivate support of national legislators
- Meet all government and Better Business Bureau requirements
- Generate visibility and media attention
- Diversify leadership
- Diversify fund-raising

(source: <http://www.madd.org/aboutus/enlist>)

Since our focus is on understanding how a small grassroots initiative like MADD becomes a worldwide force for change, let us look at some of the ways in which micro and macro forces aligned in this case when hope and history certainly appear to have rhymed and, in so doing, add from a complexity perspective to the list of lessons learned from MADD. The MADD lessons are primarily organizational and operational, but a larger and broader macro views adds depth of understanding to how MADD's momentum was connected to, was supported through, and propelled by larger forces. Analyzing these may provide guidance about how to be more intentional and prescient about managing macro-micro alignments in moving social innovation to high-and-wide impact scale.

*“The times they are a changin’”*

The year in which Candy Lightner's daughter was killed, 1980, was the year in which Ronald Reagan was elected President of the United States. His campaign, and that of the Republican Party generally, included a national call to arms to get tough on crime,

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stop drug use, and make judges take criminals off the streets. Reagan had just completed two terms as Governor of California, where MADD was born. His campaign rhetoric indicted the court system, especially “liberal” judges, for lenient sentences. This began a quarter century of legal and judicial reform, still going on, to “toughen” the courts, including mandatory sentencing initiatives, and longer and harsher sentences, especially targeted at repeat offenders. These larger efforts paralleled perfectly the specific MADD agenda. In 1982, in time for President Reagan’s first mid-term effort to get more Republicans elected to Congress, he announced a Presidential Task Force on drunk driving and invited MADD to serve on it. That same year MADD backed a resolution enacted into law by Congress to establish the first National Drunk and Drugged Driving Awareness Week. By the end of 1982, MADD had grown to 100 chapters. In 1984 Canada inaugurated the first international chapter of MADD. In that same year the Federal "21" minimum drinking age bill was enacted.

*“Just say no.”*

First Lady Nancy Reagan launched the anti-drug “Just Say No” campaign. The school program D.A.R.E. (Drug Abuse Resistance Education) was founded in 1983 in Los Angeles to fight all kinds of drug use, including playing a lead role in defining alcohol as a drug. MADD and DARE rode parallel and mutually reinforcing waves, as DARE grew to being implemented in nearly 80 percent of U.S. school districts involving 26 million students, and in more than 54 countries around the world, reaching another 10 million.

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Partners Against Crime

Given the responsibility to control Civil Rights marches, feminist protests, and anti-war demonstrations in the 1960s, police had come to be viewed by the youth culture as the enemy. Both MADD and DARE built their strategies for change on making the police partners against crime. The police were early supporters of MADD's efforts to toughen drunk driving and increase enforcement. Police were the teachers in the DARE program. These efforts emerged at a time when police were working to rebuild their community connections by engaging in crime prevention instead of just arresting criminals, enlisting community support, reaching out to youth people, and undertaking community policing initiatives. The agendas of the police, MADD, and DARE overlapped and reinforced each other perfectly.

From Treatment to Punishment

In the 1960s, symbolized by the liberal "Great Society" programs of the time, all kinds of social ills were seen as the result of poor family backgrounds, inadequate education, and insufficient social support systems. Alcoholism became widely understood to be a disease rather than simply a sign of character weakness. Programs for the treatment of alcoholism and drug abuse flourished along with treatment programs for juvenile delinquents, child abusers, sex offenders, wife beaters, and others who had come to be seen as victims of society's past injustices and lack of caring. The "Just Say No" campaign marked a turning point toward the current emphasis on personal responsibility. Reagan's huge tax cuts especially targeted treatment programs, most of which were considered by the 1980s to have failed to achieve their promises of redeeming the fallen.

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Punishment replaced treatment as the order of the day. Prison populations grew exponentially and changed their missions – not rehabilitation but punishment and keeping criminals locked up as long as possible. MADD’s underlying messages of vengeance and punishment, especially for repeat offenders, resonated deeply with the backlash against coddling criminals, drunks, addicts, child molesters, and rapists. The tide had turned culturally from hopeful rehabilitation to harsh condemnation, from treatment to punishment.

### Women as Activists and Agents of Change

MADD culminated a century-long process of ever-increasing female activism and social innovation. The earlier temperance movement in the United States, like the suffrage campaign, had been led by women, the latter eventually successful while the ultimate failure and repeal of Prohibition cast doubt on whether women could lead a movement other than that of winning the vote. By the 1980s the role of women in society had changed so fundamentally across every dimension of society that MADD faced none of the barriers of activism that their earlier temperance sisters had faced, questions at that time about the appropriateness of women even appearing in public without their husbands, much less speaking out and demanding change. While MADD has male members and allies, MADD was born as and remains a female-led movement, benefiting from the sea change in women’s role in society that epitomizes the twentieth century.

### Changing Perceptions of Drunkenness

Historically, drunkenness was portrayed in movies and television as amusing. Drunks did and said funny things. Moreover, drinking was perceived as a coming of age

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rite – and right. It was one of the ways that boys became men. Men drank, and drank to excess, simply a cultural fact of life. Changing these deeply embedded cultural perceptions and expectations would require major social innovation. MADD's first innovation was making such changed expectations part of its explicit agenda. In 1986 MADD launched its first telemarketing programs to spur growth in grassroots support and serve as a major public awareness campaign to educate the general public on drunk driving issues. That same year *Project Red Ribbon* is introduced and one million red ribbons are distributed as motorists pledge to drive safe and sober during the Christmas and New Year holidays. In 1987 a national 1-800 hotline was created to provide victim support. These strategies and developments coincided with the emergence of public interest marketing, using advertising for the first time to promote positive images supporting change in the public interest.

## HOPE AND HISTORY RHYME

It has been said that nothing is so powerful as an idea whose time has come. What we've been trying to trace and understand is how Candy Lightner's personal crisis intersected with larger societal forces, how her individual commitment became intertwined with streams of social momentum, until, at that complex intersection of individual and societal, some significant part of the world emerged as different, as transformed. In attempting to understand the dynamics of social transformation, we found that one of the greatest challenges is knowing when our efforts are truly in sync with the times, when macro forces of change and micro (grassroots) efforts are synergistically flowing together, when "*hope and history rhyme.*" How can leaders

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assess the extent to which their efforts are aligned with the metaphorical stars? The “stars” in such alignments are long-term and large-scale political, social, economic, cultural, and ecological changes in overlapping and mutually reinforcing systems? Seamus Heaney observed: “Change seems impossible when you are looking forward and inevitable when you are looking backwards.” Looking back, it has become popular to attribute such change breakthroughs to having achieved “critical mass” or having reached a “tipping point.” But what is “critical mass” and how does a leader recognize a “tipping point.” How do we know when our change efforts are ready to “go to the next level”? When is it time to “scale-up”?

Miscalculation about “going to scale” can doom a promising effort by prematurely stretching limited resources to the breaking point. Contrariwise, too much caution can mean missing that moment when the window opens but briefly. We have conflicting proverbs that guide us in both directions:

*He who hesitates is lost.*

*Fools rush in where angels fear to tread.*

Tension and paradox abound in the space between these admonitions. Ultimate success hangs in the balance. In the next section we want to share one of the frameworks, Fitness Landscapes, that we have found useful in mapping the progress of social transformation, a thinking tool from complexity theory that offers a way for social innovators and their supporters to think about, test, and ultimately *see* macro-micro alignments, strategize about critical mass and tipping points, attend to feedback loops

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about efforts at scaling up for broader impact, and make sense of the false starts and pitfalls that can accompany such initiatives.

### RECOGNIZING FITNESS LANDSCAPES

*Fitness landscape is a term coined by complexity scientist Stuart Kauffman to describe an evolutionary process* for organisms, organizations and industries in which one moves across a shifting rugged landscape with an eternal quest to get to ever higher peaks - a metaphor for increasing fitness or capacity to be resilient. The research on fitness landscapes provides a cautionary reminder that successful social innovation is not a “fixed address” that can be arrived at and the burdens laid down. The insights derived from mapping fitness landscapes emerged from exploring the question: How does evolution happen?

*-The external environment shapes evolution.* Ecological theories suggest that evolution happens by external factors. As the environment, or ecology, changes, species, or organizations, which “fit” the new environment will thrive.

*-The internal constitution shapes evolution.* Genomic theories are based on the principle that internal factors or genetic mutations create new attributes. The survival of the fittest concept shows that those attributes which are best adapted to the environment will then be passed on to future generations. In organization theory, this is akin to developing processes and practices as an organization culture that shapes how the organization will look in successive generations.

But Kauffman, argues that neither the external nor internal arguments tell the whole evolutionary story. Instead, he argues that we need to think about evolution more as movement on a shifting rugged landscape – a fitness landscape. (Lewin, pg. 68)

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Evolution – biological or organizational – requires abilities to move around a landscape which can vary in terms of ruggedness. The evolutionary goal is to get on higher and higher peaks.

When a landscape is simple, like the Fujikawa landscape with one huge dominant peak, the goal is clear – climb Mount Fuji. In organizational terms, this is the equivalent of knowing the one key to success or the best practice to be replicated. Those who follow the presumed best practice will be higher on the one important peak in the landscape.

But a landscape becomes more rugged – with more peaks and valleys – as more factors come into play. More factors lead to more interdependence. Hence, it is usually not as straightforward as discerning the “Mt. Fuji skill” for success or the one best practice. Instead, combinations of factors come into play and they influence each other. Picture the Rocky Mountains. Now the landscape looks more like a series of peaks and valleys with no clear dominant peak in sight.

The goal of climbing to the top of the highest peak becomes a problem when one is on the side of mountain. We can only see the immediately surrounding peaks. We may believe we are climbing a huge mountain only to find when we reach the top that the mountain we were on blocked the view of the next mountain range – an even higher set of peaks.

Add another level of complexity to the picture – the landscape evolves as we move across it – and we have a more accurate picture of the challenge of evolution. Not only do we have the challenge of a rugged landscape where we may not be able to see the peaks beyond our current mountains, but the peaks themselves are shifting by our actions

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and the actions of others in society. A mountain may become a hill or even a valley over time and vice-versa.

If a social transformation's evolutionary landscapes were as straightforward as the Fujikawa landscape, it would be clear what had to be done to be a "winner". Climb up Mt. Fuji. Although this is a daunting task, the task and goal would be clear. For social transformation, the landscape is more often than not rugged and shifting.

MADD's story is one of a co-evolving, shifting landscape influenced by and influencing external forces. MADD was both shaped and was shaping the societal attitudes the public policies and legislation in Canada and the USA on drinking and driving. Candy Lightner started her crusade to reduce drunk driving fatalities. The goal was clear and the landscape was one that she and her cohorts became more and more skilled at navigating. But the movement wasn't hers alone. External and internal forces, some of which she helped to initiate took on a life of their own. Initially this meant that the mountain they were climbing grew ever taller and in some ways they were able to climb higher just because the mountain itself was growing. MADD's timing coincided with a variety of societal and political trends that meant that the spread of their ideas was rapid and profound. They were riding the wave, to mix metaphors. The time was right, the mood of the community was right and there were enough local powerful stories of loss and grief that there was a human or micro connection.

However, as time passed, the landscape continued shifting and the peak or trend of "reducing drunk driving" began to be less significant than the neighbouring peak or trend of zero tolerance. The movement for zero tolerance was gaining ground in part due

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to the efforts of MADD. Lightner was in some ways caught off guard by the power and shifts both internal and external to MADD that led them to spend more and more time on the growing trend of zero tolerance.

We don't know whether Cindy Lightner would have been able to maintain the original course and goals of MADD had she been more aware of fitness landscapes. However, we do know that it is very difficult to see the shifting landscape when all of your energies are focused on climbing the current mountain. Landscapes may shift in subtle ways such that each minor change may be missed and one can experience the boiled frog syndrome. Or landscapes may shift dramatically and with apparent discontinuity. We believe that an awareness of the shiftiness, if you will, of landscapes is important for social innovators. The capacity to both work with context and recognize that context will change is a paradoxical leadership challenge for social innovators.

***Growing by abandoning growth***

When the landscapes are more rugged and co-evolve, we are faced with conceptual (as well as physical challenges). It is not enough to be a good climber. One also has to know when to abandon a climb, when to slide down a slope, and how to jump from one peak to another.

Reverend Jeffrey Brown and his colleagues in Boston began the long, slow ascent to addressing the problems of escalating rate of youth murders. In time, they made tremendous progress and the peak seemed to be in sight as the murder rate plummeted from 150 per year to 40. They learned a great deal and shared the learning by creating the Ten Point Coalition movement. However, the landscape was shifting and co-evolved

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with the very work Rev. Brown and his colleagues were doing. As the local gangs lost their grip on the neighbourhoods, the international gangs saw an opportunity to move in to "fertile" territory. As the youth murder rates began to increase for the first time in 5 years, Rev. Brown realized the mountain they were climbing was shrinking as another large mountain grew in the background. They were slipping down and needed to regroup to begin the ascent up a different mountain. The ground has shifted and their work needs to continue but the new landscape brings new challenges, and new opportunities.

Rev. Brown's story is a powerful reminder of how ephemeral success is in social transformation. Viewed from a fitness landscape perspective, this is not a failure but rather an inevitable trait of a co-evolving world. Success needs to be re-defined not as a destination but as a journey; a journey of increasing attentiveness to the shifting landscape and the capacity to be resilient. Resilience includes the ability to abandon efforts that are no longer working, even when they were highly successful in the past.

***Vision of the ultimate peak is often wrong.***

One cannot rely on sight or vision to determine the highest peak. The very mountain one is climbing often blocks our vision to other peaks. This is clear if we are talking about climbing a physical mountain. We also think it is true when we are talking about the metaphorical mountains climbed by social innovators.

At PLAN, Al and Vicki Etmanski felt compelled to stop climbing the mountain they were on and ask if there were other more significant mountains to climb. They understood what they couldn't articulate at the time. They knew that their very successful model of working with parents of disabled adults was not the mountain they now needed

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to climb. This took a great deal of courage as they were becoming highly skilled at the service delivery model they had created. But they felt it wasn't enough and their hard work wasn't going to change the world, even though it clearly changed the world for those directly affected by their work. They had the insight to look beyond their mountain and look for the potentially larger peaks of transforming the way we think about persons with disabilities. They were looking for the micro-macro connections that would make their ideas have significant and broad impact on the lives and families of persons with disabilities. They could see that although they could replicate their current model in new communities across the country, this type of spread was not enough. The impact would be very significant locally and yet not change the overall landscape. The next chapter of their work involves thinking about the macro level factors which impact societal views of persons with disabilities.

***Beyond Continuous Improvement***

To look beyond the current mountain is to buck a significant trend in management today: continuous improvement for ongoing adaptation. The continuous improvement movement created a whole cadre of approaches that initially allowed players to climb higher on local peaks. Much of it related to a “stick to the knitting” concept of getting rid of unnecessary steps, products and services so we could get ever better at producing what we were really good at. However, the same approaches that were designed to focus on eliminating unnecessary steps in the value chain frequently diverted attention away from issues such as “is this the right value chain for us to be pursuing?” Improving the

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efficiency and effectiveness of service delivery can divert attention away from the question of whether delivering services is the best way to achieve the ultimate goal.

Becoming ever more proficient at our primary skillset and developing more efficient and effective ways to produce and deliver goods and services may seem like a sound strategy. This may seem especially true when everyone else seems to be focused on the same skillset, and efficiencies. But working harder and harder at being fit may not be a sufficient strategy when others can change the fitness landscape. Cindy Lightner was effectively pushed away from the organization she founded because the landscape shifted, in part due to her own actions.

***No Best Landscape***

Mapping fitness landscapes is based on complexity-sensitive contingency thinking. A particular social transformation strategy needs to be ‘fitted’ to the landscape in which the social innovator is working while, at the same time, realizing that the landscape may be shifting. The hiking truism that “the map is not the territory” offers the insight that one has to be moving constantly back and forth between map and territory, revising the map as our understanding of the territory evolves. This kind of contingency-oriented, fitness landscape thinking runs counter to the emphasis on knowledge generation disseminated in the form of best practices that has swept like wildfire through all sectors of society. The U.S. federal government publishes *best practices* for education, health, highways, and welfare reform. Philanthropic foundations are anxious to discover, fund, and disseminate best practices. Corporations advertise that they follow best practices. Management consultants teach best practices. Measuring,

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managing, and improving upon intellectual capital has quickly become one of corporate America's top priorities, according to Knowledge Management of Internal Best Practices (*Best Practices, LLC*, 2001). Their benchmarking study and "BestPracticeDatabase" provides an example of what is being promulgated. Derived from "studying world-class customer service practices [that] foster higher quality customer service and satisfaction..." **Best Practices Benchmarking**<sup>TM</sup> reports provide "fast and effective access and intelligence to world-class excellence:

...Using best practice research findings, the Best Practices, LLC research team identified key performance dimensions or sub-elements that are cornerstones of the integrated management system. The key performance dimensions include:

1. Link Best Practices to Strategy Fulfillment
2. Best Practice Identification Systems
3. Best Practice Recognition Systems
4. Communicating Best Practices
5. Best Practice Knowledge Sharing Systems
6. Ongoing Nurturing of Best Practices

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Best Practices have become a highly prized form of knowledge as the world looks to identify and emulate success. But we have come to believe that complexity theory and practitioner wisdom (as represented by the cases we've examined) converge in cautioning social innovators against the temptation to declare one's own success to be a *best practice*. To do so is to fail to identify the dynamic context factors that contributed to a specific success in a specific context under particular systems conditions, in other words,

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the very idea of best practices presumes the possibility of a one-size-fits-all fitness landscape map. Part of the problem is the very language of “best” -- not just effective practices, or decent practices, or better practices – but best. Seldom do such statements identify for whom the practice is best, under what conditions it is best, or what values or assumptions undergird its best-ness.

The assumptions undergirding the phrase “best practices” (e.g., that there must be a single best way to do something) are highly suspect. In a world that values diversity, many paths exist for reaching some destination; some may be more difficult and some more costly, but those are criteria that take us beyond just getting there and reveal the importance of asking, “best” from whose perspective using what criteria in what context (fitness landscape)?

From a systems point of view, a major problem with many "best practices" is precisely the way they are offered without attention to context. Suppose automobile engineers identified the best fuel injection system, the best transmission, the best engine cooling system, the best suspension system, etc. Let us further suppose, as is likely, that these best subsystems (fuel injection, etc.) come from different car models (Lexus, Infiniti, Audi, Mercedes, etc.). When one had assembled all the "best" systems from all the best cars, they would not constitute a working car. Each best part (subsystem) would have been designed to go together with other specifically designed parts for a specific model of car. They're not interchangeable. Yet, a lot of "best practices" rhetoric presumes context-free adoption.

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"Best practices" that are principles to guide practice can be helpful. "Best practices" that are highly prescriptive and specific (e.g., "first graders should be read to by teachers out loud at least fifteen minutes a day" -- to cite an example I was shown by a teacher) represents bad practice of best practices. Calling something "best" is typically more a political assertion than an empirical conclusion. The substitute phrases "better practices" or "effective practices" tend less toward overgeneralization, providing there is reasonable evidence to support such an assertion in terms of both internal and external validity criteria.

***Lessons Learned***

Utilization-focused developmental evaluation is a way of emphasizing the potential of evaluative thinking and practice to yield learning, a way of enhancing and systematizing feedback, reflective practice, and *ongoing adaptation* as a social transformation unfolds. Along those lines, let us propose a way for social innovators to capture and communicate "lessons learned" in a way that is both more rigorous and more meaningful than best practices.

A common problem when some idea becomes highly popular, in this case, the search for lessons learned, is that the idea loses its substance and meaning. As these phrases have become widely used, they have been applied to a wide range of successes (many quite short-term) and any kind of insight (evidentially-based or not). In contrast, we pondered what might constitute a high-quality lessons learned. The transferability or extrapolated relevance of a supposed lesson learned would increase to the extent that it

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was supported by multiple sources and types of learnings, and that the context within which the learnings emerged was communicated with the learnings.

High quality lessons learned from successful social innovations, then, would represent principles extrapolated from multiple sources and independently triangulated to increase transferability as cumulative knowledge working hypotheses that can be adapted and applied to new situations, a form of pragmatic utilitarian generalizability, if you will. The internal validity of any single source of knowledge would need to be judged in terms of the criteria appropriate for that type of knowledge. Thus, practitioner wisdom and evaluation studies may be internally validated in different ways. However, when these various types and sources of knowledge cohere, triangulate, and reinforce each other, that very coalescence increases the likelihood of external validity, perhaps sufficient to justify designation as a triangulated better practice, or a high quality lesson learned. This book has followed this approach in that before an insight or lesson found its way into these pages it had been subjected to the tests and multi-layered screens of real world practice (cases), complexity and social science theory, wisdom from experts and scholars, and our own diverse experiences shared through reflective practice.

This brings some degree of rigor to the notion of lesson learned. Such rigor takes on added importance as, increasingly, the substantive contribution of social innovators includes not only how to achieve success in a particular setting but also generating knowledge based on having learned how to synthesize cross-innovation findings about patterns of effective interventions, that is, promising practices in innovation design and lessons learned about effective social innovation generally. Below we present a list of

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kinds of evidence that could be accumulated from a successful social innovation to support a hypothesized lesson learned, making it more worthy of application and adaptation to new settings in that it has independent triangulated support from a variety of perspectives. Questions for generating “lessons learned” are also listed.

### High-Quality Lessons Learned

High-quality lessons learned: knowledge that can be applied to future action and derived from screening according to specific criteria:

- (1) evaluation findings--patterns across programs;
- (2) theory supported by basic and applied research conclusions;
- (3) practice wisdom and experience of practitioners;
- (4) experiences reported by program participants/clients/intended beneficiaries;
- (5) expert opinion;
- (6) cross-disciplinary patterns and mutually reinforcing ideas;
- (7) assessment of the importance of the lesson learned;
- (8) strength of outcomes documentation and attribution claims;
- (9) clarity of context for each source; and
- (10) detailed case examples that illuminate dynamics of the lesson.

The idea is that the greater the number of supporting sources for a “lesson learned,” the more rigorous the supporting evidence, and the greater the triangulation of supporting sources, the more confidence one has in the significance and meaningfulness of a lesson learned. Lessons learned with only one type of supporting evidence would be considered a “lessons learned hypothesis.” Nested within and cross-referenced to lessons learned should be the actual cases from which practice wisdom and evaluation findings have been drawn. A critical principle here is to maintain the contextual frame for lessons learned, that is, to keep lessons learned grounded in their context. For ongoing learning, the trick is to follow future supposed applications of lessons learned to test their wisdom and relevance over time in action in new settings.

#### Questions for Generating High Quality Lessons Learned

1. What is meant by a “lesson”?
2. What is meant by “learned”?
3. By whom was the lesson learned?
4. What’s the evidence supporting each lesson?
5. What’s the evidence the lesson was learned?

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6. What are the contextual boundaries around the lesson (that is, under what conditions does it apply)?
7. Is the lesson specific, substantive and meaningful enough to guide practice in some concrete way?
8. Who else is likely to care about this lesson?
9. What evidence will they want to see?
10. How does this lesson connect with other “lessons.”

**ENDURING SUCCESS**

For a social innovator to be able to offer high quality lessons learned about how to achieve success, some degree of success needs to be evident. In the last chapter we looked at the trap of taking too much responsibility for and personalizing failure. The other side of this Janus conundrum is falling prey to and being seduced by success. The result: Hubris. Nothing turns success into tragedy more certainly than the prideful blinders and arrogance of hubris. Success can create resistance to ongoing change, blindness to the nature of co-evolution as the fitness landscape changes, incapacity to adapt to changing conditions, and undervaluing continuing innovation to build on past successes. Both individual leaders and entire organizations are vulnerable to the rigidities that can accompany hubris. Consider the cautionary tale of the NASA space shuttle tragedies.

When the Space Shuttle Columbia crashed on February 1, 2002, killing all seven astronauts aboard, a comprehensive independent investigation ensued by a 13-member board of inquiry. While the direct mechanical problem was damage caused by a foam tile that came loose during lift-off, the more basic cause, investigators concluded, was NASA’s culture, a culture of complacency nurtured by a string of successes since the 1986 Challenger disaster, which also killed seven. This led to a habit of relaxing safety

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standards to meet financial and time constraints. The Columbia Accident Investigation Board concluded in its 248-page report issued in August, 2003 that the space agency lacked "effective checks and balances, does not have an independent safety program and has not demonstrated the characteristics of a learning organization."

"The board strongly believes that if these persistent, systemic flaws are not resolved, the scene set for another accident," the report said.

Retired Navy Adm. Harold Gehman, the board's chairman, told reporters at a Washington briefing that NASA tends to follow safety procedures diligently at first, then "morph or migrate away" from that diligence as time goes on. In addition to detailing the technical factors behind Columbia's breakup, just minutes before its scheduled landing at the end of a 16-day science mission, the board's report laid out the cultural factors behind NASA's failings. It said NASA mission managers fell into the habit of accepting as normal some flaws in the shuttle system and tended to ignore or not recognize that these problems could foreshadow catastrophe. "These repeating patterns mean that flawed practices embedded in NASA's organizational system continued for 20 years and made substantial contributions to both accidents," the report said.

During Columbia's last mission, NASA managers missed opportunities to evaluate possible damage to the craft's heat shield from a strike on the left wing by flying foam insulation. Such insulation strikes had occurred on previous missions, and the report said NASA managers had come to view them as an acceptable abnormality that posed no safety risk. This attitude also contributed to the lack of interest in getting spy satellite

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photos of Columbia, images that might have identified the extent of damage on the shuttle and came to incorrect conclusions.

But most of all, the report noted, there was "ineffective leadership" that "failed to fulfill the implicit contract to do whatever is possible to ensure the safety of the crew."

Management techniques in NASA, the report said, discouraged dissenting views on safety issues and ultimately created "blind spots" about the risk to the space shuttle of the foam insulation impact. The report noted: "Little by little, NASA was accepting more and more risk in order to stay on schedule." Also: "The program was operating too close to too many margins."

Success, then, can trap leaders into complacency and blind them to the need to constantly scrutinize what is happening. Successful leaders need to become skilled at asking "wicked questions" about their own successes, carefully examining the factors that appear to have contributed to success while paying special attention to small problems that might, in complex and unpredictable ways, grow to undermine success. Successful social innovators may need to find a modern version of the Roman servant assigned to stand behind triumphant generals as they entered Rome to the adulation of the masses, that servant's responsibility being to whisper continuously in the General's ear: "All glory is fleeting." So are the successes of social transformation. New peaks to climb can be counted on to appear in evolving fitness landscapes.

Insert a sidebar on "wicked questions."

Guerrilla Tactics

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In the spirit of drawing lessons and insights from different fields, we offer the guerrilla tactician as a metaphor for the social innovator successfully traversing shifting fitness landscapes. Guerrilla fighters are especially attuned to the elusiveness of final success. They are always outnumbered and out-resourced. They always face seemingly overwhelming odds against superior forces. Their primary advantages, when they are effective, mirror the premises of complexity theory and panarchy (an integrating perspective forthcoming in the final chapter): they are intensely connected to each other through dynamic information flows; they discover and unlock local resources embedded in the local context, resources often unseen by and unknown to those they oppose; and they are highly adaptable, being quick to change course and take advantage of shifting circumstances and emergent opportunities. Social transformation efforts often take on a guerilla flavor as they encounter large scale social forces and organized opposition (sometimes in the form of powerful strangers). Guerrilla tactics are all about achieving *maximum gain with minimum effort*. The rules of guerrilla engagement exemplify the simple rules orientation of complexity science. Here, then, are six rules of guerilla engagement adapted to social innovation.

1. **Make diversity work for you, move on a broad front, don't put all the eggs in one basket.** This flies in the face of the usual advice to concentrate limited resources and focus change efforts, but intentionally diverse forays provide more feedback in the search for the big macro wave that can carry you forward. MADD organized demonstrations, make media appearances, worked

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behind the scenes with legislators, sought allies anywhere and everywhere, sought out other grieving and angry families – and in the process honed its message and figured out where the leverage points were.

2. **Direct efforts where you will get the largest multiplier effect. Avoid gestures.** Surfers try to catch a wave as it is forming, then ride it as it crests and reaches maximum force. It's harder to ride a wave that is far advanced, though such alignment is better than facing an opposing force. But aligning with a macro force as it is forming will provide the greatest momentum. MADD got started as the political-cultural transition from treatment to punishment was just taking off.
3. **When attacked - don't fight back. Pull out and re-strategize.** A lot of energy can be wasted trying to overcome major opposition and fight macro forces. Successful guerillas look for points of weakness, make quick forays, emphasize flexibility, use feedback effectively, and nurture resilience. They learn to go with the flow of what's working until it isn't working any more, then they try something else. MADD grew initially through informal networking, responding to inquiries generated by initial publicity and interpersonal contacts. They then turned to a more proactive tactic of seeking people to organize chapters in areas where there were gaps in the network. Expanding internationally required yet another change of tactics to adapt to local cultures and politics.

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4. **Go around, or encircle resistance. Reduce its power.** Leaders can be tempted to make frontal assaults driven by an impatience to bring about change quickly. In general, however, frontal assaults fortify resistance rather than defeat it. MADD did not attack breweries and liquor vendors who were initially defensive about the nascent organization's message. The liquor industry had huge resources to put into play if they felt directly threatened. MADD focused instead on public policy and the courts where resistance would be less organized and diffuse. MADD also went after hard core, repeat offenders, not social drinkers. The opposition that has now surfaced against MADD is fueled in part by the perception that its mission has changed to one of prohibition, which has generated more opposition and resistance than at any time in its history.
5. **Encircle from within (find out who can influence from inside).** This is where MADD made especially effective use of mothers who had lost children, embracing and supporting them even as they provided opportunities for action and engagement, a way of channeling grief and anger for change.
6. **Keep an eye on the environment. Depending upon what is happening there you may have to change and reorder strategies.** This is fundamentally about ongoing scanning, futuring, and assessing the alignment between macro and micro forces. Guerillas thrive through flexibility and adaptability in the face of changing conditions.

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- ❖ *Detecting macro-micro alignment offers a framework for bringing systems understandings into evaluation, especially making understanding of context and system dynamics central to interpreting findings.*

Traditional evaluation approaches hue closely to the tasks of measuring goal attainment and determining causal attribution. These are seen as the primary functions of evaluation. Thus does evaluation reinforce linear, mechanical thinking and a narrow focus on micro-level goals and objectives. Embedded within every evaluation is a way of thinking about the world. Embedded in developmental evaluation are sensitivities to systems dynamics, continuous change, and ongoing learning. Judging macro-micro alignment is fundamentally an evaluation problem. Interpreting a fitness landscape is fundamentally an evaluation problem. Evaluators familiar with and comfortable with these more open and emergent approaches to evaluation will be a better match for social innovators and the challenges they face. This suggests that evaluation needs a more contingency-based conception of its function in which the primary challenge is to match the evaluation approach to the nature of the effort being evaluated.

Where social innovations are based on, monitoring, and attending to macro-micro alignments, evaluators schooled only in traditional linear modeling and narrow goals-focused measurement will actually become barriers to rather than enhancers of innovation. To be useful and assure appropriate methods, evaluators need to adapt to the nature of the social innovation rather than imposing traditional

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evaluation on nontraditional innovations – beginning with being able to recognize the difference.

❖ *Help social innovators ask not just are we doing things right, but also, are we doing the right things.*

As noted in the discussion of fitness landscapes, the continuous improvement movement focused on helping those involved in change climb higher on local peaks through incremental and gradual improvements on the margin. However, this focus on increasing effectiveness frequently kept leaders and evaluators from asking: Is this the right thing to be pursuing *in the current context and under current, emerging conditions?* Improving the efficiency and effectiveness of service delivery can divert attention away from the question of whether delivering services is the best way to achieve the ultimate goal. Evaluative thinking invites these larger strategic questions aimed at assessing the changing fitness landscape.

### **Conclusion**

The story of Mothers Against Drunk Driving provides a sterling case example of what can happen when hope and history rhyme. Hindsight analysis of the movement's huge impact and success reveals the magnitude of the rhyme. The challenge explored in this chapter is whether hindsight can become foresight. Can accidental and merely fortuitous alignments become intentional and strategic? Can we see macro-micro alignments as they unfold, when we're in the middle of the unfolding? Can we learn to detect the sea changes underway and ride the wave to support large-scale social innovation? This chapter answers affirmative to these questions.

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We close this affirmation of the possibility of being intentional and strategic about the rhyming of hope and history with a reminder of the Cassandra Paradox. In the Iliad, she is described as the loveliest of the daughters of Priam (King of Troy), and gifted with prophecy. The god Apollo loved her, but she spurned him. As a punishment, he decreed that no one would ever believe her. So when she told her fellow Trojans that the Greeks were hiding inside the wooden horse, they ignored her warning. The irony is that it would have been so easy to check out that possibility, to engage in reality-testing. The Cassandra Paradox is that the most obvious possibilities may be ignored or dismissed precisely because they are so obvious. The Trojan Horse was not hard to see. It was huge – right there before their eyes. Macro forces are not inherently or always murky, ambiguous, and uncertain. Sometimes, perhaps often, they are huge and very visible – but we have to look to see, study closely to distinguish figure from ground, listen carefully to distinguish signal from noise, and attune all our senses to detect when hope and history are rhyming and use all our intellectual powers to interpret the implications of the rhyme.