Building a Community of Practice Through Adaptation and Integration of Multiple Methods and Diverse Approaches to Evaluative Inquiry

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ABSTRACT
Six major research and evaluation trends provide a context for presenting an innovative adaptation of the Delphi method that combines multiple methods and diverse evaluation approaches to support and enhance building a community of reflective practice around the issues of physical, emotional, and spiritual well-being for social change advocates and activists. Real-time feedback and evaluative inquiry that both generates knowledge and constitutes an intervention illustrates how research and action can be mutually reinforcing in a co-created participatory inquiry process. The importance of adaptive and emergent multiple methods designs that can both evaluate and foster change in complex dynamic systems is discussed. The article closes with concern about the credibility, use, and value of research-based evaluation findings in what has been dubbed the post-truth era.

KEYWORDS
Adaptation; Delphi approach; emergence; multiple methods; program evaluation

A Cautionary Tale

The king of the Kingdom of Wisdom was growing old. He had two sons to whom he commissioned the task of expanding the kingdom. One traveled south and built Dictionopolis, the city of words; the other went north and built Digitopolis, the city of numbers. The two brothers and their two cities entered into a fierce rivalry. The people of Dictionopolis believed that words were wisdom and much more important than numbers. The people of Digitopolis believed that numbers were wisdom and much more important than words. The rivalry intensified.

To avoid war and settle the matter, they agreed to arbitration by two independent thinkers, Rhyme and Reason, princesses who lived in the capital city of Wisdom. After lengthy and thoughtful deliberation, they pronounced that words and numbers were both essential and equally valuable. Outraged, the brothers banished Rhyme and Reason from the Kingdom of Wisdom.

Eventually, after a great and dramatic rescue, Rhyme and Reason were returned to the Kingdom of Wisdom. To find out how, and why this story matters, you’ll have to enter into the Kingdom of Wisdom through The phantom tollbooth (Juster, 1961), a classic children’s book for children of all ages. Its relevance here, in setting the stage for this article, is that today, instead of commissioning just two independent evaluators, Rhyme and Reason, to adjudicate the issue, a mixed methods Delphi inquiry would have permitted crowdsourcing the answer from a community of expert and engaged practitioners using multiple research methods.

The Emergence of Multiopolis

Let’s expand the ancient Kingdom of Wisdom further with a new city of utilization-focused multiple methods that we’ll call Multiopolis, a sister city of Minneapolis (city of water) from whence I scribe. The people of Multiopolis believe in using any and all data they can gather to understand issues, solve problems, inform action,
and make decisions. Six modern trends have given rise to *Multiopolis* as a vibrant city in the Kingdom of Wisdom:

1. the emergence of the Knowledge Age transcending the Agricultural and Industrial Ages;
2. the rise of applied social science research that brings evidence to bear in service of a better world;
3. the adaptation and application of research and evaluation processes as direct interventions in the quest for a better world, beyond just studying and understanding the world to being used as mechanisms for changing the world;
4. the increasing demand for speed—real-time results and feedback usable now;
5. the ascendance of the Internet making global interactions possible, easy, and relatively inexpensive; and
6. the Platinum Standard of methodological appropriateness replacing the outdated Gold Standard of methodological rigidity.

In this article, I’ll briefly review these trends, then provide an example of their integration as an example of research in *Multiopolis*, Kingdom of Wisdom, where a modern and innovative version of the Delphi oracle has emerged. I’ll close with the imminent threat to *Multiopolis* from the gathering army of Post-truthioplois, anti-intellectual barbarians preparing to lay siege to *Multiopolis* and destroy the Kingdom of Wisdom. The rivalry between the cities of *Dictionopolis* and *Digitopolis* involved academic skirmishes and paradigm wars, but no actual shedding of blood. Rhyme and Reason prevailed. That happy outcome is not assured in the portending war and skirmishes already occurring, threatening to become full-scale battles with lives and livelihoods at stake.

**Six Trends Affecting Evaluation Research Designs and Uses of Findings**

**Trend 1: The emergence of the Knowledge Age transcending the Agricultural and Industrial Ages.** It has been dubbed the Information Age, the Communications Age, the Post-Industrial Age, and the Digital Age, among other monikers. *Knowledge Age* gets to the heart of the matter. In the agricultural age, land and labor created value. In the industrial age, access to capital, mechanized production, and worldwide trade produced economic growth and societal value. In the knowledge age, usable, timely, and actionable information rules. Gillings, Hilbert, & Kemp, 2016; New Zealand Council for Educational Research [NZCER], 2015. With the correct information, one can obtain land, labor, capital, efficiency, and global reach. Research and evaluation are the hard currency, the central intellectual bank, of the knowledge age. The esteemed and influential management scholar Peter Drucker (1959) coined the term *knowledge workers*, which he foresaw would become the most valuable asset of 21st-century institutions of all kinds because of their productivity, capacity to spark innovation, and their adaptability in a rapidly changing world (Drucker, 1999). Anyone reading this journal is likely a knowledge worker in the knowledge age and a denizen of *Multiopolis*.

**Trend 2: The rise of applied social science research that brings evidence to bear in service of a better world.** In the interest of space, I shall limit my illustration of this trend with a single example, the one I know best, the growth and globalization of program evaluation. The United Nations declared 2015 as the International Year of Evaluation with the following themes:

- Evidence for the world we want, and
- Using evaluation to improve people’s lives through better policy making (EvalPartners, 2014).

There are now more than 150 national and regional evaluation associations worldwide and an estimated 75,000 professional evaluators serving in a variety of data collection, analysis, reporting, and evaluation functions across diverse sectors, institutional settings, positions, and organizational responsibilities (Donaldson, 2015). Evaluators are valued and leading citizens in *Multiopolis*.

**Trend 3: The adaptation and application of research and evaluation processes as direct interventions in the quest for a better world, beyond just studying and understanding the world to being used as mechanisms for changing the world.** This important trend, controversial among traditional researchers to be sure, involves making data collection part of the intervention. In traditional social science, reactivity has been considered a problem. Reactivity refers to how data collection affects people, including learning from pretest instruments, being stimulated to form opinions while responding to surveys, and being affected by in-depth interviewing. But, from the perspective of those interested in social change, participatory inquiries that support and enhance learning from involvement in an inquiry, makes participatory and collaborative research a mechanism and pathway to change. In program evaluation, this is called *process use*.

The learning that occurs as a result of stakeholder involvement in evaluation is twofold: (a) the inquiry can yield specific insights and findings that can change practice and (b) those who participate in the inquiry learn to think more systematically about what they are doing and their own relationship with those with whom they
work. In many cases, the specific findings are secondary to the more general learnings that result from being involved in the process (Patton, 2008, 2011, 2012, 2018b). To elaborate on this point, changes in thinking and behaving can and do occur among those involved in evaluation as a result of the learning that occurs during the evaluation process. Changes in program or organizational procedures and culture are also documented to occur as manifestations of process impacts. Cumulatively, at a societal level, this means that stakeholder-involving evaluation approaches and other forms of participatory action research can have dual tracks of impact: (a) a more informed electorate through use of findings and (b) a more thoughtful and deliberative citizenry through helping people learn to think and engage each other evaluatively and evidentially.

**Trend 4: The increasing demand for speed—real-time results and feedback usable now.** Real-time feedback and results are the order of the day. If actions are to be informed by data in the worlds of action research and program evaluation, findings must be available in as timely a fashion as possible—that is, a trend that affects both quantitative and qualitative data, and mixed methods. It is captured in the title of a book written by distinguished international evaluation pioneers and thought leaders, Ray Rist and Nicolleta Stame (2006), *From Studies to Streams: Managing Evaluative Systems*. The terms rapid reconnaissance, rapid review, and rapid assessment connote doing fieldwork and analysis speedily, often to meet tight decision deadlines for policymakers (Beebe, 2001, 2008; Saul, Willis, Bitz, & Best, 2013). In our highly dynamic world, it’s important to stay close to the action.

In an epidemiological crisis, as in the outbreak of highly contagious diseases (e.g., the Ebola virus in Africa) or the emergence of AIDS, rapid reconnaissance teams made up of medical personnel, public health researchers, and social scientists are deployed to investigate the crisis and determine the immediate interventions and longer term actions needed. Rapid assessments are important to inform timely decision making in highly fluid natural disaster and political turmoil situations, where understanding and meeting the critical needs of refugees and displaced persons are urgent (Tutul, 2014; Weiss, Bolton, & Shankar, 2000). Rapid assessments are especially aligned with interventions and strategies that seek rapid results, like the Rapid Results Institute. Rapid appraisals respond to increasing demands for real-time data. Where decisions have to be taken with imperfect data, some data are better than none, and timely findings are better than reports that come in after a decision has been taken. Although speed can contribute to utility, the quality and selectivity of rapid recon data can raise credibility questions. Rapid appraisal teams need to be carefully selected to be credible, represent diverse perspectives and skills, be politically and culturally sensitive, have the capacity to gather and analyze data quickly, communicate effectively, and work together smoothly under pressure. We live in a real time world where things change rapidly, attention spans are short, windows of opportunity open and close quickly, and information flows continuously from multiple directions. This elevates the importance of timeliness as an evaluation research principle. Feedback is not rapid for the sake of being rapid. It’s rapid because it must be to support timely decision-making, adaptation, and fork-in-the-road funding and strategy decisions. Timeliness is driven in part by the recognition that evaluation findings have a short shelf life, especially in turbulent environments. What is relevant and meaningful can change rapidly. Keeping findings fresh and useful requires speed. Timeliness connected to utility for providing timely findings is essential for use. The bottom line is that Multiopolis is a real-time, now-time, all-the-time physical and virtual space.

**Trend 5: The ascendance of the Internet making global interactions possible, easy, and relatively inexpensive.** This trend needs neither explanation or elaboration. We are all living it 24/7. This trend affects all kinds of methodological inquires, including mixed methods. One advantage of online and social media inquiries using multiple methods is that the data are entered into analysis systems as part of the inquiry; so, there is no need for transcription or mechanical data entry. Online inquiry, both quantitative and qualitative, and mixed methods, can also be conducted more quickly and, therefore, be increasing expectations for real-time results. Let me just state this: *Multiopolis* is totally wired, highest speed, broadest band, net neutrality, and complete interconnectivity—qualities befitting the knowledge age.

**Trend 6: The Platinum Standard of methodological appropriate replacing the outdated Gold Standard of methodological rigidity.** Not everyone is up-to-speed on this trend, although, hopefully, readers of this journal are in-the-know in the knowledge age. In platinum standard references, the designation *platinum standard* has been used by Deborah Lowe Vandell, chair of the Department of Education at the University of California at Irvine, to describe an evaluation design that uses a range of data collection approaches (e.g., observations, interviews, surveys) to collect qualitative and quantitative data on program implementation and outcomes (Harvard Family Research Project, 2010). I refer readers to “Toward a Platinum Standard for Evidence-Based Assessment by 2020,” which incorporates case studies, comparative methods, triangulation, and alternative causal approaches in recognition of the wide array of goals and methodologies that are appropriate for assessing programs and policies in a dynamic and globalizing world (Khagram & Thomas, 2010); and Michael
Scriven’s (2008) article, which refers to a higher standard than gold for causal research, a platinum standard (p. 18).

In essence, the practice of methodological pluralism and appropriateness involves adapting designs to the existing state of knowledge, the available resources, the intended uses of the inquiry results, and other relevant particulars of the inquiry situation. As an elder in the evaluation profession, once deeply engaged in the qualitative-quantitative debate, I now avoid argumentative and aggressive responses in challenging gold standard narrow-mindedness. Having decided that it’s more likely a matter of ignorance than intolerance, I’ve adopted the stance of being kind, sensitive, understanding, and compassionate, and say, “Oh, you haven’t heard. The old RCT [randomized controlled trial] gold standard has been supplanted by a new, more enlightened, Knowledge-Age platinum standard” (stated while beaming wisely).

Professor David Storey (2006) of Warwick Business School, University of Warwick, has offered a competing metaphor to replace the gold standard. He has posited “seven steps to heaven” in conducting evaluations, where heaven is a randomized experiment. So, materially oriented and worldly evaluators are admonished to aspire to the gold standard, whereas the more spiritually inclined can aspire to follow the path to heaven, where heaven is an RCT.

In contrast, the metaphors of multiple methods inquiry are more along the lines of staying grounded, looking at the real world as it unfolds, going with the flow, being adaptable, and seeing what emerges. Suffice it to say, Multiopolis runs on platinum, not gold.

Knowledge Age, Multiple Methods, Participatory Action Research and Evaluation in the Modern Kingdom of Wisdom: A Case Example

Here’s the scenario. A network of philanthropic foundations and non-profit organizations working in areas of social justice, anti-poverty initiatives, and systems change decide to collaborate. They come together to address difficult problems like community violence, sexual abuse, child neglect, inadequate schools, and care for the elderly, to name but a few of the challenging issues that they view as priorities for action. They support change advocates who engage these issues at the grassroots. The day-to-day grind of working on these problems takes a high toll on those engaged and can lead to burnout, stress, long hours of work (because the job is never done), sleep disorders, depression, and related declines in health and well-being. To counter these effects, the network of foundations and nonprofit organizations created a professional development process for leaders involved in social justice initiatives. They created an opportunity for these leaders to participate in three week-long retreats in which they would examine their well-being, be exposed to ways of enhancing their well-being, and get support for attending to their own well-being. In so doing, they would become part of a community of practice. Many of these social change advocates neglect their own well-being as they attempt to help those in need. The premise of the community of practice intervention is that social change advocates will ultimately be more effective over a longer time if they take good care of themselves, not only physically, but mentally and spiritually. The question was how to follow and evaluate the effects of such an initiative. The proposed multiple methods approach presented here flows from the six trends reviewed earlier: (a) knowledge age appropriateness; real-time engagement and feedback; (b) using evidence to evaluate effectiveness; (c) adaptation and application of research and evaluation processes as direct interventions in support of change; (d) real-time results and feedback; (e) using the Internet for global interactions; and (f) meeting the Platinum Standard of methodological appropriateness with participants learning through reflection and engagement.

Using a Modified Delphi Approach for Shared Inquiry with Integrated Evaluation Approaches to Build and Enhance a Community of Practice

The multiple methods approach presented here combines and integrates four distinct evaluation approaches with community of practice learning and engagement processes using a modified Delphi approach. Let’s begin with the modified Delphi approach.

The Delphi Method

The Delphi method was developed in the 1950s by the RAND Corporation in Santa Monica, California (Cuhls, 2004). It originally involved administering a survey in two or more rounds with the innovation that participants in the second round were able to see the results of the first survey so that they could adjust their initial re-
sponses in the follow-up survey. Of course, they also had the option of replicating their original responses. The surveys were administered anonymously so respondents could change their opinions without others knowing they did so, thereby avoiding embarrassment or the need to justify such changes. The assumption underlying the Delphi method was that the interactions between the first and second surveys enhanced the quality and validity of responses (Cuhls, 2004). The Delphi method became widely used for long-range forecasting (20-30 years) based on surveys of experts in science, technology, and education, soliciting opinions about likely trends and their consequences.

The name of this approach is credited to a faculty team at University of California, Los Angeles (UCLA) working for the RAND Corporation (Kaplan, Skogstad, & Girshick, 1950). They wanted to evoke the Delphic oracle in ancient Greece as the designation for this modern use of experts to make predictions for policy-making. The history is, indeed, evocative. Although the temple at Delphi was built before recorded history, the archeological record has generated extensive knowledge on the functions and benefits of the oracle.

For a thousand years of recorded history the Greeks and other peoples, sometimes as private individuals, sometimes as official ambassadors, came to Delphi to consult the prophetess, who was called Pythia. Her words were taken to reveal the rules of the Gods. These prophecies were not usually intended simply to be a prediction of the future as such. Pythia's function was to tell the divine purpose in a normative way in order to shape coming events.

One should consider that the Delphi monastery was one of the very few spots on the earth where knowledge was accumulated, ordered, and preserved. The information came in from the ambassadors through their queries and the answers were written down on metal or stone plates, several of them found by archeologists. The temple was the locus of knowledge, or, if we put it more mundanely, the Delphic oracle was probably the largest database of the ancient world. The priests could read and write; who else could do so in Greece? If due allowance is made for these circumstances, modern psychology will find no special difficulties in accounting for the operations of the Pythia and of the priests interpreting her utterances. Knowledge was intended to be used and disseminated to make the world better ...

Thanks to the oracle, the Greek people learned over many generations to abstain from bloody vendetta, to apply to courts when quarrelling in private life occurred, and to solve disputes in a fair way. It can be traced back to the oracle that one should not poison the well of one's enemy and should take care of the olive trees in war. Thus the idea of the long-term oriented development of landscaping achievements we owe to the Delphic oracle (Cuhls, 2004, p. 94).

In modern times, a number of variations on the Delphi approach have been developed. Traditionally, the Delphi method has aimed at a consensus of the most probable future by iteration. Other versions, such as the Policy Delphi, is a decision-support method aiming at integrating the diverse views to envision a desired future. The Argument Delphi focuses on articulating pros and cons rather than generating consensus.

Several Delphi forecasts are conducted using web sites that allow the process to be conducted in real-time. Recent web-based applications have used the Delphi method to support e-democracy processes. The TechCast Project uses a panel of 100 experts worldwide to forecast breakthroughs in science and technology. The Horizon Project connects educational futurists using an online Delphi method to identify possible technological breakthroughs in education.

With that brief overview of the Delphi approach, let me turn to an evaluation Delphi design that integrates multiple methods and different evaluation approaches while being responsive to the six trends that opened this article.

A Multiple Methods Community of Practice Delphi Evaluation Design

Evaluation Design Overview

Evaluation purpose. The evaluation purpose was to document and assess how nonprofit leaders approach their well-being (physical, emotional, and spiritual) over time following participation in an intensive focused reflective practice intervention.

Target population. The sample comprised two cohorts of nonprofits leaders (30 in each cohort) who had engaged in three week-long reflective practice retreats focusing on attending to personal well-being as a leadership commitment to enhance long-term effectiveness and reduce potential burn-out and stress.

Modified Delphi design approach. This approach involved the following elements: four sequential surveys asking quantitative and qualitative questions about participants’ experiences with and approaches to well-being over time; rapid feedback of results between surveys, and qualitative responses converted to survey
items from one iteration to the next; and opportunities for in-depth case studies based on clusters of responses.

Knowledge outcome. A knowledge outcome was an increased understanding of personal well-being as a dimension of nonprofit leadership and evaluation of the effectiveness of a reflective practice approach to enhancing well-being.

Community of practice outcome. A community of practice outcome was to build a networked community of reflective practice among targeted nonprofit leaders to support each other in attending to, learning about, and enhancing their well-being.

Uses and impacts. A Delphi approach to data collection provides an excellent opportunity for utilization-focused developmental evaluation data collection in order to open up opportunities for engaged interaction among those who provide data. One of the principles of utilization-focused developmental evaluation (discussed at greater length in the following section) is to make data collection meaningful to those who provide the data so that it is both a learning experience and builds deeper capacity for reflective practice and evaluative thinking.

The Modified Delphi Design

Using a Delphi approach, the nonprofit leaders who participated in the well-being reflective practice retreats are asked some questions, both open-ended and closed-ended. The results are analyzed and then fed back to participants so that they can see how their own responses are similar to, or different from, the responses of others and the full group. They also get a chance to see the range of responses for all participants.

A second round of questions are then sent to respondents from the first round, some of which may be a repeat of the first round of questions to see whether people have been influenced by the group responses, as well as adding new items of interest. It is helpful to keep the number of items limited to increase the response rate and the speed of the turnaround. This helps create a sense of anticipation among participants as they learn how others have responded. In each round, items can be added in which participants react to the patterns in the group responses.

Thus, this process involves (a) collecting targeted relevant data, (b) giving participants the chance to learn from the responses of others, and (c) supporting a learning community where people engage each other's responses. This sequential technique of administering short surveys aims to increase response rates versus including a large number of items in a single survey. Moreover, because results of survey items require interpretation for meaning and relevance, the opportunity for participants to reflect on both their own initial responses, and to compare their responses with those of the group, offers a chance to deepen reflection and appreciate the variety of responses that might be involved on important issues. The specific item examples that follow are meant to illuminate possibilities. (What follows is a thought experiment. The actual design is currently being developed with funders and participants.)

Example of a Potential Delphi Approach for Program and Organizational Directors

Let me invite you to imagine four rounds of survey items to this target population. The first round invites responses on barriers to well-being. The second survey invites responses to processes for enhancing well-being. The third survey invites reflections on the personal outcomes of increased well-being. In the fourth and final round, respondents are invited to consider the effects of changes in well-being on their engagement in the world, if any such changes have occurred. Here are some potential sample items, for illustration purposes only.

Round 1: Barriers to Well-Being

Round 1 sample items. Figure 1 presents Round 1 sample items eliciting responses regarding barriers to well-being.

Round 1 feedback and follow-up. One of the opportunities afforded by a Delphi approach is to turn open-ended responses into fixed responses to find out how many people in the group have provided similar open-ended responses. So let's say, in the first round, for the open-ended question, some respondents mention family obligations as a barrier to well-being. Family obligations was not one of the 10 items listed but in the second round, people can be asked to what extent family obligations have been a barrier to your well-being. Let's suppose further that others mention financial stress, inadequate resources to help those in need, power struggles, or some other responses. Open-ended responses can be turned into additional survey items to find
out how widespread they are. Respondents can also be invited to generate additional inputs into the overall constellation of questions to learn the extent to which those elements and factors are experienced by colleagues and peers.

**Round 2: Enhancing Well-Being**

**Round 2 sample items.** Figure 2 presents Round 2 sample items eliciting responses regarding enhancing well-being.

Please rate the extent to which you’ve experienced the following as barriers to your personal well-being.

<table>
<thead>
<tr>
<th>Items</th>
<th>Has been a great barrier to well-being for me</th>
<th>Has been somewhat a barrier to well-being for me</th>
<th>An occasional barrier for me</th>
<th>Has not been a barrier to well-being in my experience</th>
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<tr>
<td>1. Feeling responsible for always being upbeat and positive for those who look to me for leadership.</td>
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<td>2. Not getting enough sleep because of the amount of work to be done.</td>
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<td>3. Not having time to exercise regularly.</td>
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<td>4. Not having time alone for meditation, reflection, or downtime.</td>
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<td>5. Feeling guilty about taking time for myself.</td>
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<td>6. Feeling overwhelmed by the needs I see.</td>
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<td>7. Dealing with the problems of my staff and those with whom I work</td>
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<td>8. Not knowing what to do to enhance my well-being.</td>
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<td>10. Lack of peers with whom I can talk and get support.</td>
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<td>11. Open-ended question: What other barriers to your well-being have you experienced?</td>
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**Figure 1.** Round 1 sample items.

**Round 2 feedback and follow-up.** As undertaken after the first round, responses to open-ended questions can be converted to survey items in the third round. Let’s suppose that some respondents mention in-depth discussion of well-being with colleagues, or the value of mentoring novices to the field. These were not among the 10 items listed in the second round, but in the third round people can be asked to what extent those activities were important to them. Thus, a central feature of the emergent and dynamic multiple methods Delphi design is that open-ended responses can be turned into additional survey items to find out how widespread they are. Respondents can also be invited to generate additional inputs into the overall constellation of questions to learn the extent to which those elements and factors are experienced by colleagues and peers.
Which of the following have you found helpful for enhancing your well-being?

<table>
<thead>
<tr>
<th>Items</th>
<th>Very helpful to me</th>
<th>Somewhat helpful to me</th>
<th>Slightly helpful</th>
<th>Not part of my experience</th>
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<tr>
<td>1. Increased understanding of what well-being means for me.</td>
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<td>2. Having peers and colleagues to talk with authentically.</td>
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<td>3. Readings about well-being.</td>
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<td>4. Time to reflect and think about my well-being.</td>
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<td>5. Meditation, yoga, or other well-being processes.</td>
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<td>6. Eating better.</td>
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<td>7. Exercising regularly.</td>
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<td>8. Journaling or writing reflectively.</td>
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<td>9. Focusing my efforts; setting priorities; taking on less.</td>
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<td>10. Making well-being a priority in my life.</td>
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<td>11. Open-ended question: What other things have you done to enhance your well-being over the last eighteen months to two years?</td>
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Figure 2. Round 2 sample items.

**Round 3: Inquiry into Changes in Well-Being Over the Last Eighteen Months to Two Years (or Whatever Time is Appropriate)**

**Round 3 sample items.** Figure 3 presents Round 3 sample items regarding the personal outcomes of increased well-being.

To what extent has your sense of well-being changed in the following areas in the last eighteen months to two years?

<table>
<thead>
<tr>
<th>Items</th>
<th>Great increase</th>
<th>Some increase</th>
<th>Stayed the same</th>
<th>Some decrease</th>
<th>Great decrease</th>
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<td>1. Stress levels.</td>
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<td>2. Commitment to my well-being.</td>
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<td>3. My sense of purpose.</td>
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<td>4. Attention to right livelihood.</td>
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<td>5. Connecting my physical and mental well-being.</td>
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<td>6. Connection with peers and colleagues.</td>
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<td>7. My overall physical health.</td>
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<td>8. Having a more positive outlook.</td>
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<td>10. Seeing myself as a whole person.</td>
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<tr>
<td>11. Open-ended question: What other changes in yourself have you experienced related to your sense of well-being?</td>
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Figure 3. Round 3 sample items.

**Round 3 feedback and follow-up.** This discussion is the same as in previous rounds.

**Round 4: Perceived Effects on Engagement in the World**

**Round 4 sample items.** Figure 4 presents Round 4 sample items. Based on their wellness work over the last eighteen months to two years, these items invite respondent to reflect on and assess to what extent, if at all, their wellness journey has had effects on their actions in the world.
Please rate the extent to which each of these effects are true for you, if any.

<table>
<thead>
<tr>
<th>Items</th>
<th>Very much my experience</th>
<th>Somewhat my experience</th>
<th>A bit my experience</th>
<th>Not true for me</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. I’m more effective in leading my program or organization.</td>
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<tr>
<td>2. I’m more focused in my work.</td>
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<tr>
<td>3. I’ve changed priorities in my work.</td>
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<tr>
<td>4. I’ve change the focus of arena in which I’m working.</td>
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<tr>
<td>5. I’m more effective in the things I do.</td>
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<tr>
<td>6. I’m engaged in new collaborations.</td>
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<tr>
<td>7. I’m more skill in undertaking my work.</td>
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<tr>
<td>8. I’m listening better to and appreciating other perspectives.</td>
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<td>9. I’m getting more important things done.</td>
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<tr>
<td>10. I’m more knowledgeable about how to be effective in the world.</td>
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<tr>
<td>11. Open-ended question: In what other ways, if any, has your attention to and your journey of well-being affected your engagement and effectiveness in the world?</td>
<td></td>
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<td></td>
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</tbody>
</table>

**Figure 4.** Round 4 sample items.

**Round 4 feedback and follow-up.** The final round feedback includes an invitation for volunteers in identified cluster groups of responses to participate in in-depth interviews and/or case studies to more deeply document and understand the range of responses and their implications.

**Timing**

For the purpose of this community of practice project, the Delphi response cycle would involve sending out a short survey, asking for responses in two weeks, and providing feedback in one week, so that each cycle takes three weeks. Feedback and follow-up takes another three weeks for each round so that it takes six weeks to complete a two-phase survey. In a period of six months, it is possible to conduct four rounds, including feedback and follow-up each time. Because each round is short and focused, and doesn’t take much time, response rates are expected to be relatively high among motivated participants.

**Creating a Community of Reflective Practitioners**

One way to enhance interpretability and comparability of responses in sequential rounds is that only people who respond in each round get to participate in the feedback and follow-up. Thus, in the end, the final and complete set of responses are for everyone who participated in all the rounds. People who don’t respond will not get to see the feedback from others, although, in some cases, a separate follow-up is provided for the laggards so that their data can be generated in a parallel track. In terms of developmental evaluation, and keeping the experience as real-time as possible, with rapid reinforcement and feedback, a well-managed, quick turnaround Delphi process generates momentum and enthusiasm.

It is also possible to invite participants to identify questions they would ask of the cohort so that as the network becomes engaged, participants identify issues and questions that they are interested in soliciting from the community of practice reflection group. Then, over time, they can become empowered to set the agenda for ongoing inquiry.

**Additional Potential Design Features**

This kind of emergent, iterative design offers a number of potential variations and new directions that feature more methodological variation in service of further reflective practice development. Here are four examples of possibilities:

- Inviting participants with diverse responses to volunteer for in-depth interviews and/or case studies to more fully understand variations in the experiences of well-being among nonprofit leaders.
- Creating a web-based platform for community of practice participants to interact directly as their inquiry deepens.
• Enlarging significantly the sample of respondents in new Delphi rounds to enhance the scope of the community of practice and increase the breadth and depth of the evaluative inquiry.

• Supporting inquiries into naturally emergent and self-identified subgroups of nonprofit leaders who share perspectives and experiences in a nested and layered modification of the Delphi method.

What these examples have in common is the interconnection and mutually reinforcing nature of a design that is both evidence-generating and an intervention for professional development.

Integrating Evaluation Approaches with this Design

I have identified and discussed 80 different evaluation approaches and options (Patton 2008), such as the following: summative evaluation, formative evaluation, developmental evaluation, theory-driven evaluation, empowerment evaluation, outcomes evaluation, process evaluation, cost-benefit evaluation, internal evaluation, external evaluation, realist evaluation, quality assurance, responsive evaluation, independent evaluation, real-world evaluation, accountability, monitoring, and utilization-focused evaluation. Evaluation has become a field of diverse and highly specialized approaches. The modified Delphi-based community of practice design proposed in this article integrates four evaluation approaches, drawing on the strengths of each. In the sections that follow, I’ll show how principles-focused evaluation, developmental evaluation, utilization-focused evaluation, and participatory/collaborative evaluation can be interconnected and integrated for mutual reinforcement to better serve the overall evaluation and community of practice purposes described earlier.

Utilization-Focused Evaluation

Utilization-focused evaluation is a comprehensive decision framework for designing and implementing an evaluation to fit a particular situation and, in that situation, meet the information needs of primary intended uses to enhance their intended use of the evaluation. Utilization-focused evaluation is undertaken for and with specific primary intended users for specific, intended uses. Utilization-focused evaluation begins with the premise that evaluations should be judged by their utility and actual use; therefore, evaluators should facilitate the evaluation process and design any evaluation with careful consideration for how everything that is undertaken, from beginning to end, will affect use. Use concerns how real people in the real world apply evaluation findings and experience the evaluation process. Therefore, utilization-focused evaluation provides systematic, research-based guidance and a set of steps to decide what approach to evaluation is most appropriate for a particular situation and specific primary intended users. That means that utilization-focused evaluation encompasses every evaluation option methodologically, conceptually, theoretically, analytically, and process-wise. Any of the 80 options identified in “Evaluation Focus Options” in the book Utilization-focused evaluation (Patton 2008), or the many other options that have been articulated to meet particular evaluation needs and demands, can be used in a utilization-focused evaluation. In essence, utilization-focused evaluation doesn’t prescribe what to focus on but rather prescribes a process for determining what to focus on based on unwavering attention to intended uses by intended users.

Developmental Evaluation

Developmental evaluation serves the purpose of innovation development. Developmental evaluation provides evaluative information and feedback to social innovators, and their funders and supporters, to inform adaptive development of change initiatives in complex dynamic environments. Developmental evaluation brings to innovation and adaptation the processes of asking evaluative questions, applying evaluation logic, and gathering and reporting evaluative data to inform and support the development of innovative projects, programs, initiatives, products, organizations, and/or systems change efforts with timely feedback. Social innovators, funders of social innovation, advocates and supporters of social innovation, and change agents are the primary intended users of developmental evaluation—and clearly identified as such in any specific developmental evaluation. The intended use (purpose) of developmental evaluation is to support adaptation and development of the innovation. This is accomplished through ongoing and timely evaluation. The developmental evaluation feedback and findings are used by social innovators and change agents to illuminate and adapt innovative strategies and decisions. That’s intended use by intended users. That’s utilization-focused evaluation with a developmental purpose. Funders of social innovation use developmental evaluation findings to inform funding decisions and meet accountability expectations and demands. That’s also intended use by intended users. That’s also true of utilization-focused evaluation. In short, developmental evaluation is a particular kind of utilization-
focused evaluation. All that has been learned about enhancing use over 40 years of utilization-focused evalu-
tion practice and research undergirds developmental evaluation (Patton, 2008, 2012, 2015; Patton, McKegg, & 
Wehipeihana, 2016).

The developmental evaluation niche focuses on evaluating innovations in complex dynamic environments 
because that’s the arena in which innovators are working. Social-ecological innovators, for example, integrate 
understandings of and actions on the human and natural worlds as interdependent and interactive complex 
dynamic systems. Social-ecological innovators deal with people and places, and interventions within contexts. 
Innovation is a broad framing that includes creating new approaches to intractable problems, adapting pro-
grams to changing conditions, applying effective principles to new contexts (scaling innovation), catalyzing 
systems change, and improvising rapid responses in crisis conditions. Social-ecological innovation unfolds in 
social systems that are inherently dynamic and complex, and often turbulent. The implication for social inno-
vators is that they typically find themselves having to adapt their interventions in the face of complexity. Fun-
ders of social-ecological innovation also need to be flexible and adaptive in alignment with the dynamic and 
uncertain nature of social innovation in complex systems. Developmental evaluators track, document, and 
help interpret the nature and implications of innovations and adaptations as they unfold, both the processes 
and outcomes of innovation, and help extract lessons and insights to inform the ongoing adaptive innovation 
process. At the same time, this provides accountability for funders and supporters of social innovations and 
helps them understand and refine their contributions to solutions as they evolve. Social-ecological innovators 
often find themselves dealing with problems, trying out strategies, and striving to achieve goals that emerge 
from their engagement in the change process, but which they could not have been identified before that en-
gagement, and that continue to evolve as a result of what they learn. The developmental evaluator helps iden-
tify and make sense of these emergent problems, strategies, and goals as the social innovation develops. The 
emergent/creative/adaptive interventions generated by social innovators for complex problems are significant 
-enough to constitute developments not just improvements, thus the need for developmental evaluation.

Traditional evaluation approaches advocate clear, specific, and measureable outcomes that are to be 
achieved through processes detailed in a linear logic model. Such traditional evaluation demand for upfront, 
preordained specificity doesn’t work under conditions of high innovation, exploration, uncertainty, turbulence, 
and emergence. In fact, premature specificity can do harm and generate resistance from social innovators, as, 
indeed, it has, by constraining exploration, limiting adaptation, reducing experimental options, and forcing 
premature adoption of a rigid model, not because such a model is appropriate, but because evaluators, fun-
ders, or other stakeholders demand it in order to comply with what they understand to be good evaluation. 
Developmental evaluation emerged as a response to criticism of traditional evaluation by social innovators and 
their expressed need for an alternative way to engage in evaluation of their work.

Developmental evaluation involves evaluative thinking throughout. Judgments of merit, worth, significance, 
meaningfulness, innovativeness, and effectiveness (or such other criteria as are negotiated) inform ongoing 
-adaptive innovation. Such evaluative judgments do not just come at the end of some fixed period (e.g., a 
three-year grant); rather, they are ongoing and timely. Neither empirical conclusions and interpretations, nor 
evaluative judgments, are reached and rendered by the evaluator independently. Developmental evaluation is 
a collaborative, interactive process. Being utilization-focused, and because developmental evaluation unfolds 
in complex dynamic systems where the particular meaning and significance of information might be difficult to 
pre-determine, making sense together of emergent findings involves the developmental evaluators interpret-
ing patterns in the data collaboratively with social-ecological innovators, their funders, advocates, change 
agents, and systems change supporters. Through this empirically focused interaction, developmental evalua-
tion becomes an integral part of the innovative process.

**Principles-Focused Evaluation**

Here are the distinctions so far. Utilization-focused evaluation is a comprehensive decision-making framework 
for determining what kind of evaluation is appropriate for a particular situation and specific primary intended 
users to serve their intended uses. Developmental evaluation is one particular purpose of evaluation: support-
ing development of social innovations introduced by social innovators into complex dynamic situations. Prin-
ciples-focused evaluation (Patton, 2018b) calls attention to and focuses on one particular object of evaluation: 
principles as the evaluand. Outcomes are the evaluand of outcomes-focused evaluation. A project is the evalu-
and of project-focused evaluation. A theory of change is the evaluand of theory-of-change-focused evaluation. 
Program processes are the evaluand of process-focused evaluation. And, follow me closely here, principles are 
the evaluand of principles-focused evaluation.
Principles-Focused Developmental Evaluation

A principles-focused developmental evaluation would evaluate how principles are informing innovative developments in a complex dynamic situation. Because developmental evaluation often unfolds without predetermined or fixed processes and outcomes, the innovative process may be guided by adherence to principles. Adapting those principles to particular challenges and changing contexts is often a primary focus of developmental evaluation. For example, an innovative, community-based anti-poverty initiative may be committed to the principle of inclusion. A principles-focused developmental evaluation focused on inclusion would be appropriate for such an initiative because it combines the purpose of supporting and evaluating innovation development with a focus on principles as the rudder for navigating complexity in the process of developmental adaptation. But not all developmental evaluations are principles-focused, and not all principles-focused evaluations are developmental in purpose. Principles-focused evaluation is especially appropriate for the community of practice example in this article because both the well-being focus and the community of practice approach are principles-based.

Well-being principle. Take care of yourself physically, emotionally, spiritually, professionally, and personally to enhance long-term effectiveness as a leader.

Community of practice principle. Engage in reflective practice with other leaders to deepen insight, well-being, and effectiveness both individually and collectively.

Evaluating Principles

Principles-focused evaluation can evaluate processes of implementing principles, outcomes associated with principles, longer-term and broader impacts that result from principles-driven programming, and innovative approaches to principles adaptation. Principles-focused evaluation can serve a variety of purposes: accountability, formative, summative, developmental, and knowledge-generating. In all these applications, principles-focused evaluation should be utilization-focused. Across all these applications, diverse purposes, and varying uses, the distinguishing characteristic of principles-focused evaluation is the focus on principles as the object of evaluation, as the evaluand. Three core questions bring the focus to principles-focused evaluation: To what extent have meaningful and evaluable principles been articulated? If principles have been articulated, to what extent and in what ways are principles being adhered to in practice? and if adhered to, to what extent and in what ways are principles leading to desired results? (Patton, 2018b). Now let’s turn to the fourth and final evaluation approach integrated in this design.

Participatory/Collaborative Evaluation

From the classic articulation and justification of Participatory Action Research by William Foote Whyte (1989, 1991) to methods and facilitation guides on how to actually do it (Hacker, 2013; King & Stevahn, 2013; Patton, 2018a; Pyrch, 2012), participatory and collaborative engagement has been a major approach to evaluations. When conducting research in a collaborative mode, professionals and nonprofessionals become coresearchers. Participatory action research encourages collaboration within a mutually acceptable inquiry framework to understand and/or solve organizational or community problems. Participatory and collaborative inquiries have four purposes and justifications that exemplify the principle of co-creation:

1) Values premise: The right way to inquire into a phenomenon of interest is to do it with the people involved and affected. This means doing research and evaluation with as opposed to people. It means engaging them as fellow inquirers and coresearchers rather than as research subjects.

2) Quality premise: Data will be better when people who are the focus of the inquiry willingly participate, understand the nature of the inquiry, and agree with the importance of the study. Interviews will be richer and more detailed. Observations will be open and unguarded. Documents will be readily available. Data are better.

3) Reciprocity premise: Researchers get data, publications, knowledge, and career advancement from research and evaluation studies. Those who are the focus of inquiry should benefit as well. As coresearchers, through participation in the inquiry, they learn research skills, learn to think more systematically, and gain knowledge that they can use for their own purposes.

4) Utility premise: In program evaluation and action research inquiries, the findings are more likely to be useful—and actually used—when those who must act on the findings collaborate in generating and interpreting them.
Collaborative Research Exemplar

A good example of a high quality, highly credible, and already widely influential Delphi process was work undertaken by Brad Cousins, Lyn Shula, and colleagues on principles for collaborative evaluation. I was a participant in that study. The principles were developed and tested in four phases over a four-year multiple-method, multi-phase study:

- two pilot phases exploring the desirability of developing a set of principles; an online questionnaire survey that drew on the expertise of 320 practicing evaluators to identify dimensions, factors or characteristics that enhance or impede success in collaborative approaches in evaluation (CAE); and finally a validation phase involving a subsample of 58 evaluators. (Shulha, Whitmore, Cousins, Gilbert, & Al Hudib, 2016, p. 193)

They involved evaluation practitioners in responding to what their experiences were in being part of collaborative evaluations. They used the feedback from several rounds of responses to both generate and then verify a set of principles. It’s an exemplar of what can emerge from this kind of process.

Integrating Evaluation Approaches

What then are the essential elements of the proposed Delphi design that integrate these four evaluation approaches: utilization-focused evaluation, developmental evaluation, principles-focused evaluation, and participatory/collaborative evaluation? The answer is eight essential evaluation design dimensions applied in the Delphi design reviewed earlier:

1) **Developmental purpose.** The modified Delphi process has the purpose of both generating knowledge and developing a community of practice. This reflects the trend that inquiry can also be an intervention in support of change.

2) **Evaluation rigor.** The Delphi design is evidence-based throughout. The multiple methods used and feedback solicited add triangulation and cross-referencing responses from round to round as ways of validating the findings.

3) **Utilization focus.** The emergent nature of the design across the four rounds increases relevance and, therefore, evaluation utility. That makes the inquiry and engagement process utilization-focused evaluation.

4) **Innovative and emergent inquiry and engagement.** The modified Delphi inquiry is generative and confirmatory. As such, engagement is an invitation to creatively innovate both individually (applications to personal and professional life) as well as through creation of a cohesive and engaged community of practice.

5) **Complexity perspective.** The dynamic and emergent nature of the design incorporates complexity perspectives, including nonlinear interactions and potential nonlinear and tipping point impacts for the community of practice.

6) **Systems thinking.** The community of practice is an emergent system, starting out as an informal network, but with the potential for subgroups to form as nodules of knowledge creation and shared inquiry within the larger community of practice system.

7) **Co-creation.** The evaluation researchers and community of practice participants are all involved in generating relevant items, interpreting results, and using findings.

8) **Timely feedback.** The Delphi approach epitomizes timely feedback. One of the rewards of providing timely and useful feedback is having social innovators, funders, and other stakeholders understand and accept the insights offered, react appreciatively, and follow through with decisive action in a short, defined time period. On occasions, timely and astute feedback and learning leads to important reframing and new directions for a community of practice. Traditional evaluations serve accountability needs through predetermined mid-term and end-of-project reports, or standardized quarterly monitoring reports. In contrast, a rapid feedback and iterative Delphi approach offers opportunities to capture changing conditions and understandings in complex dynamic systems. Such results can inform decisions about future funding, extending the inquiry, changing the scope of work, and assessing the value-added community of practice shared inquiry processes and findings. Timeliness rules.

Summary and Conclusion

This article has proposed a modified Delphi design to evaluate and help build a community of practice made up of nonprofit leaders inquiring into how attention to personal wellness might increase their effectiveness. Their reflective practice serves the dual purposes of utilization-focused evaluation to generate knowledge and real-
time learning to inform their interactions and further development of their community of practice. Multiple methods in combination with integrating diverse but interrelated evaluation approaches (developmental evaluation, principles-focused evaluation, and participatory/collaborative evaluation) create a dynamic and emergent design that addresses major trends in both evaluation research and the nonprofit world. Authors of recent books called the The future of evaluation (Donaldson, 2013; Stockmann & Meyer, 2016) and Evaluation and turbulent times: Reflections on a discipline in disarray (Furubo, Rist, & Speer, 2013) have emphasized the importance of evaluation becoming more adaptive, responsive to complexity theory and systems thinking, and in tune with significant societal trends in the knowledge age. Positive trends include appreciating and using multiple methods, supporting and engaging in reflective communities of practice, and utilization-focused evaluation that integrates developmental evaluation, principles-focused evaluation, and participatory/collaborative forms of evaluation. Not all trends are positive, however. The kingdom of wisdom and Multiopolis are threatened by gathering dark clouds that must also be acknowledged.

The Threat from Post-truthioplai

This article was stimulated, in part, by a desire to highlight the central role of rigorous evaluative thinking in multiple methods designs and the integration of diverse evaluation approaches to enhance the utility of a particular design, the modified Delphi approach. But such designs require a commitment to knowledge, learning, and truth. As context, I am writing this shortly after the 2016 U.S. presidential election that was characterized by fabrications, lies, misrepresentations, illogic, character attacks, and a general disregard for facts, data, science, and evidence. Politics inevitably involves different opinions. But as distinguished social scientist, policy researcher, and U.S. Senator from New York, Patrick Daniel Moynihan, stated: “Everyone is entitled to his own opinion, but not to his own facts.” Would that it were so! Instead, we have seen the politics of the big lie resurrected at an unprecedented level:

If you tell a lie big enough and keep repeating it, people will eventually come to believe it. It thus becomes vitally important for the State to use all of its powers to repress dissent, for the truth is the mortal enemy of the lie, and thus by extension, the truth is the greatest enemy of the State. (Anonymous (often inappropriately attributed to Joseph Goebbels, Minister of Propaganda, Nazi Germany, World War II; cf. https://history.stackexchange.com/questions/17591/did-goebbels-really-say-truth-is-the-enemy-of-the-state-if-so-when))

Minister of Propaganda

The rise of social media makes disseminating big lies easier than ever. One consequence highlighted by the New York Times editorial board is that

when everyone can customize his or her own information bubble, it’s easier for demagogues to deploy made-up facts to suit the story they want to tell. That’s what Mr Trump has done. For him, facts aren’t the point; trust is. Like any autocrat, he wins his followers’ trust—let’s call it a blind trust—by lying so often and so brazenly that millions of people give up on trying to distinguish truth from falsehood. Whether the lie is about millions of noncitizens voting illegally, or the crime rate, or President Obama’s citizenship, it doesn’t matter. In a confusing world of competing, shouted “truths,” the simplest solution is to trust in your leader. As Mr Trump is fond of saying, “I alone can fix it.”

He is not just indifferent to facts; he can be hostile to any effort to assert them ... Mr Trump has changed this game. He has exploited, perhaps better than any presidential candidate before him, the human impulse to be swayed more by story than by fact. As one of his surrogates said recently, “There’s no such thing, anymore, of facts.” (The Editorial Board, 2016, par. 10)

We now know from research on how our brains process information that we are vulnerable to confirmation bias: the tendency to search for, interpret, favor, and recall information in a way that confirms our preexisting beliefs and prejudices, while giving little consideration to contrary evidence (Kahneman, 2011). In so doing, we mistake the repetition of the same thing over and over as confirmation of its truth. Repetition of the big lie becomes verification of its truth, a danger for people of any and all political persuasions. And if the challenge of thinking clearly and rigorously was not already daunting, truthiness has ascended to overshadow truth. Truthiness, a term introduced sarcastically by comedian Stephen Colbert on October 17, 2005 (Zimmer, 2010), refers to the quality of preferring facts that feel right and that one wants to believe to be TRUE. No need to worry about actual facts and empirical evidence.

Solidifying this trend, the Oxford Dictionaries (2016) named “post-truth” the 2016 word of the year: “Relating to or denoting circumstances in which objective facts are less influential in shaping public opinion than appeals
to emotion and personal belief” (Oxford Dictionaries, 2016). The early days of the new Trump administration have been characterized by insisting on alternatives facts, a euphemism for distortions and misrepresentations of the facts. A phrase that teachers of English grammar would have traditionally labeled redundant—true facts—is now a matter for reiteration, fact-checking, and independent verification.

So, as we inquire into the definition, parameters, nature, applications, implications, consequences, and facilitation of multiple methods, let’s bear in mind what it is not: lying, big or little; manipulation of data to support perceived positions; cherry-picking evidence to distort the full truth; illogical and unwarranted conclusions; intentionally creating and disseminating false news; treating opinions as facts; truthiness; and fabricating evidence to support ideological and political positions. And that’s just the short list. We may not agree on a precise definition of multiple methods based on rigorous evaluative thinking, but perhaps we can agree on what it is not. In that regard, one of the benefits of an evidence-oriented community of practice using multiple methods is a commitment to avoiding manipulating evidence to support predetermined conclusions; rather, such a community supports the empirical quest for facts, warranted conclusions, and, ultimately, verifiable truths.

References


