

## METHOD 6

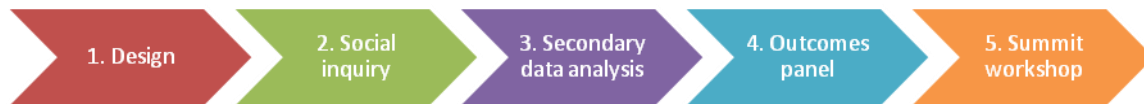
### Collaborative Outcome Reporting Technique (CORT)

The Collaborative Outcome Reporting Technique (CORT) was developed by Dr Jess Dart and is characterized by two elements: a participatory process whereby the information is generated and a five-part structure in which the report product is presented.

**Report structure:** the report aims to explore and report the extent to which a program has *contributed* to outcomes. Under the CORT, reports are short and generally structured against the following sections:

1. A narrative section explaining the **program context** and rationale.
2. A **'results chart'** summarising the achievements of a program against a theory of change model.
3. A narrative section describing the **implications** of the results e.g. the achievements (expected and unexpected), the issues and the recommendations.
4. A section which provides a number of 'vignettes' that provide **instances of significant change**, usually first person narratives.
5. An index providing more detail on the sources of **evidence**.

**Participatory process:** CORT uses a mixed method approach that involves participation of key stakeholders in a number of process steps:



Participation can occur at all stages of this process for example:

1. **In the planning workshop.** In this workshop the theory of change is clarified, existing data is identified and evaluation questions developed. Consultants play the role of facilitation and documentation.
2. **In the data trawl.** Program staff may be enlisted to help with the collation of data, although in our experience consultants usually lead this process as the evaluation managers.
3. **The social inquiry process.** Volunteers can be given a short training session in interviewing and with the help of an interview guide can conduct the interviews. This is a very effective way to involve staff in the data where there is sufficient enthusiasm around the process. Otherwise consultants or the evaluation managers conduct all or a proportion of the interviews.
4. **Outcomes panel.** People with relevant scientific, technical, or sectoral knowledge are brought together and presented with a range of evidence compiled by the consultants. They are then asked to assess the contribution of the intervention towards goals given the available knowledge. We call this an outcomes panel and it is usually facilitated. It is sometimes also referred to as an expert panel. It can be substituted for a citizen's jury.
5. **Summit workshop.** At a large workshop instances of significant change are selected (incorporating aspects of Most Significant Change Technique) and key findings and recommendations are synthesised. The summit should involve broad participation of key stakeholders such as program staff and community members.

**Advantages:** Organisations often place a high value on the reports because they strike a good balance between depth of information and brevity and are easy for staff and stakeholders to understand. They help build a credible case that a contribution has been made. The participatory process by which reports are developed offers many

opportunities for staff and stakeholder capacity building. Compared to standard outcomes evaluations approaches they are relatively straightforward. They are a great way to kick off a new monitoring and evaluation system, because they involve synthesising and reflecting on all existing data and data gaps (a great platform to think about what data is really needed!). It has been used in a wide range of sectors from overseas development, community health, and Indigenous education. But the majority of work has occurred in the Natural Resource Management Sector, with the Australian Government funding 20 pilot studies in 2007-9.

**Limitations:** PSR's have been criticised for being too appreciative, or for being incapable of telling a bad story. While this is certainly a risk, the technique does attempt to address this in a number of ways. Firstly all informants are asked to describe the strengths and the weaknesses of the program. These weaknesses or issues are documented in the report. Secondly, the outcomes panel is encouraged to report on negative as well as positive trends in terms of the outcomes. So the "negatives" are not avoided in this process. However, the choice of topic for an outcomes report is often purposeful rather than randomly selected. Topics for reports are often selected on the basis that they are likely to show some significant outcomes. In addition CORT only address one type of key evaluation question. That is the question concerning the extent to which an investment contributes to outcomes. It is an extremely important question, but it is not the *only* type of key evaluation question that is important. This needs to be understood and acknowledged. For this reason, CORT should not be seen as the only reporting tool. The idea is that it should complement other reporting processes or be extended to encompass more.

**Values:** CORT is based on the premise that the values of stakeholders, program staff and key stakeholders are of highest importance in an evaluation. The evaluators attempt to "bracket off" their opinions and instead present a series of data summaries to panel and summit participants for them to analyse and interpret. Values are surfaced and debated throughout the process. Participants debate the value and significance of data sources and come to agreement on the key findings of the evaluation.

**Quality:** The focus on quality is largely associated with *process quality*: ethical conduct; culturally appropriate methods; ownership of the evaluation process; ensuring that the evaluation provides credible but useful recommendations to inform the next phase of the program. Interviews are usually taped and transcribed. Data is double analysed by participants at workshops and by the consultants using thematic coding.

**Complexity:** CORT is especially useful when a program has emergent or complex outcomes that are not fully defined at the onset of a program. For this reason a theory of change is refreshed at the start of the evaluation process. In addition qualitative inquiry is used to capture unexpected outcomes and deliberative process are used to make sense of the findings.

**Resources:** Clear Horizon runs a two-day training program on this technique. We have also drafted a comprehensive User Guide that lays out all steps of the process. See [www.clearhorizon.com.au](http://www.clearhorizon.com.au). Examples report can also be found here. Jess hopes to write the book soon!