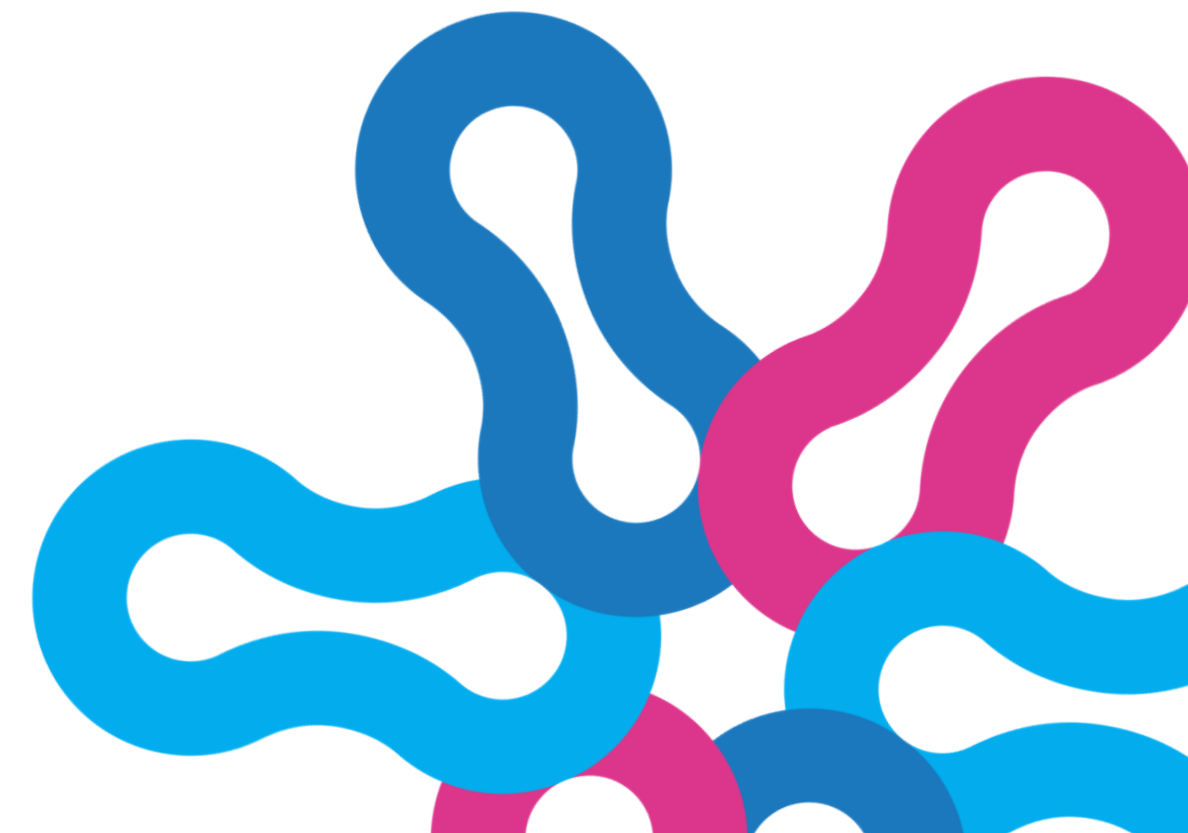


2 June 2025

# A 3 Horizons Approach to Transformational Change

## Objective

The wider evaluation community is aware of what has emerged from the 3HEI work, people buy-in to the importance of shifting the evaluation field, they are identifying current or potential H2+initiatives and are interested to collaborate on taking it forward



# Agenda

Time UTC	Session	Responsible
14.00	Welcome and intro to session and speakers	Ian Goldman (President, IEAc)
14.05	Introduction to 3H	Ian Kendrick (3HUni, IEAc)
14.20	How we applied AI	Silva Ferretti (IEAc)
14.30	Introduction to what has emerged	Sonal Zaveri (IEAc) Sibongile Sithole (IEAc) Andrealisa Belzer (President Elect, IEAc)
14.50	Reflections	Ian Goldman
14.55	H2+ initiatives	Jennifer Norins (IEAc, SAMEA) Ian Kendrick
15.15	Next steps and collaboration	Ian Goldman
15.25	Closing	Ian Goldman



# Speakers



**Ian Goldman**  
President, IEAc;  
M&E Advisor, SA  
Presidency.



**Ian Kendrick**  
IEAc Friend;  
Founder  
H3Uni



**Zenda Ofir**  
IEAc Friend;  
Specialist in Evaluation  
and Transformation



**Silva Ferretti**  
Consultant;  
IEAc Friend



**Sibongile Sithole**  
IEAc Friend



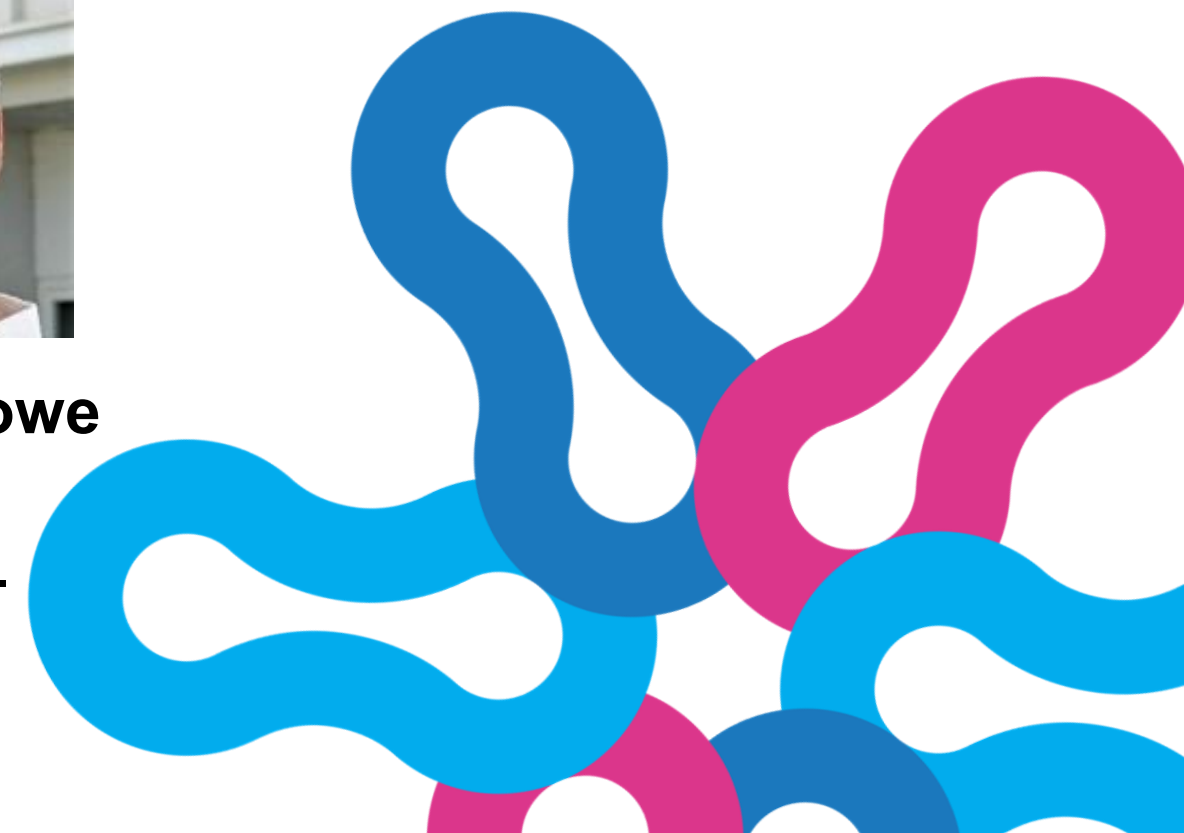
**Andrealisa Belzer**  
President elect, IEAc;  
EvalPartners/IOCE;  
Past President, Canadian  
Evaluation Society



**Jennifer Norins**  
IEAc Friend;  
SAMEA Chair;  
MIET Africa

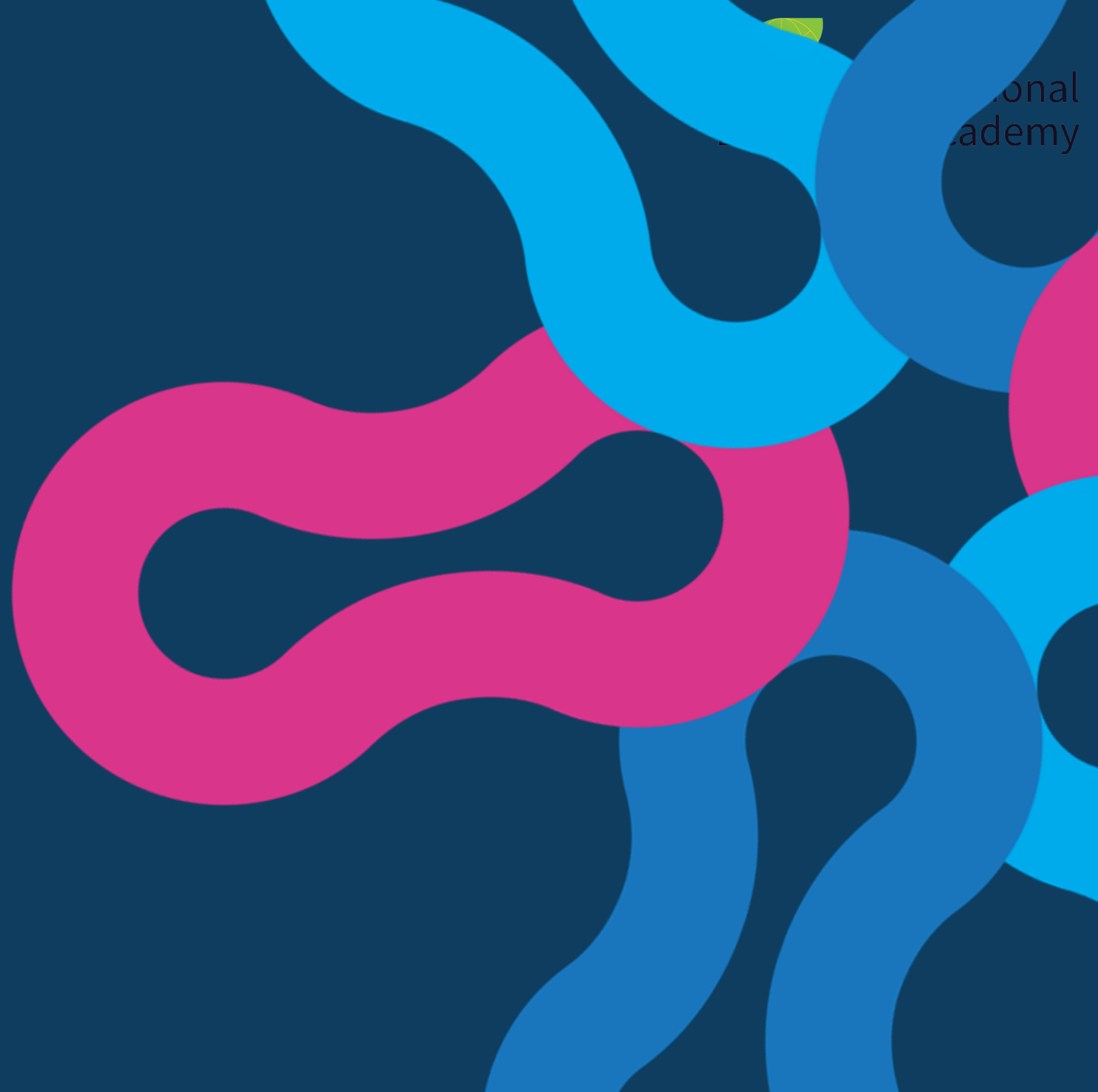


**Scott Chaplowe**  
IEAc Friend,  
former Board.

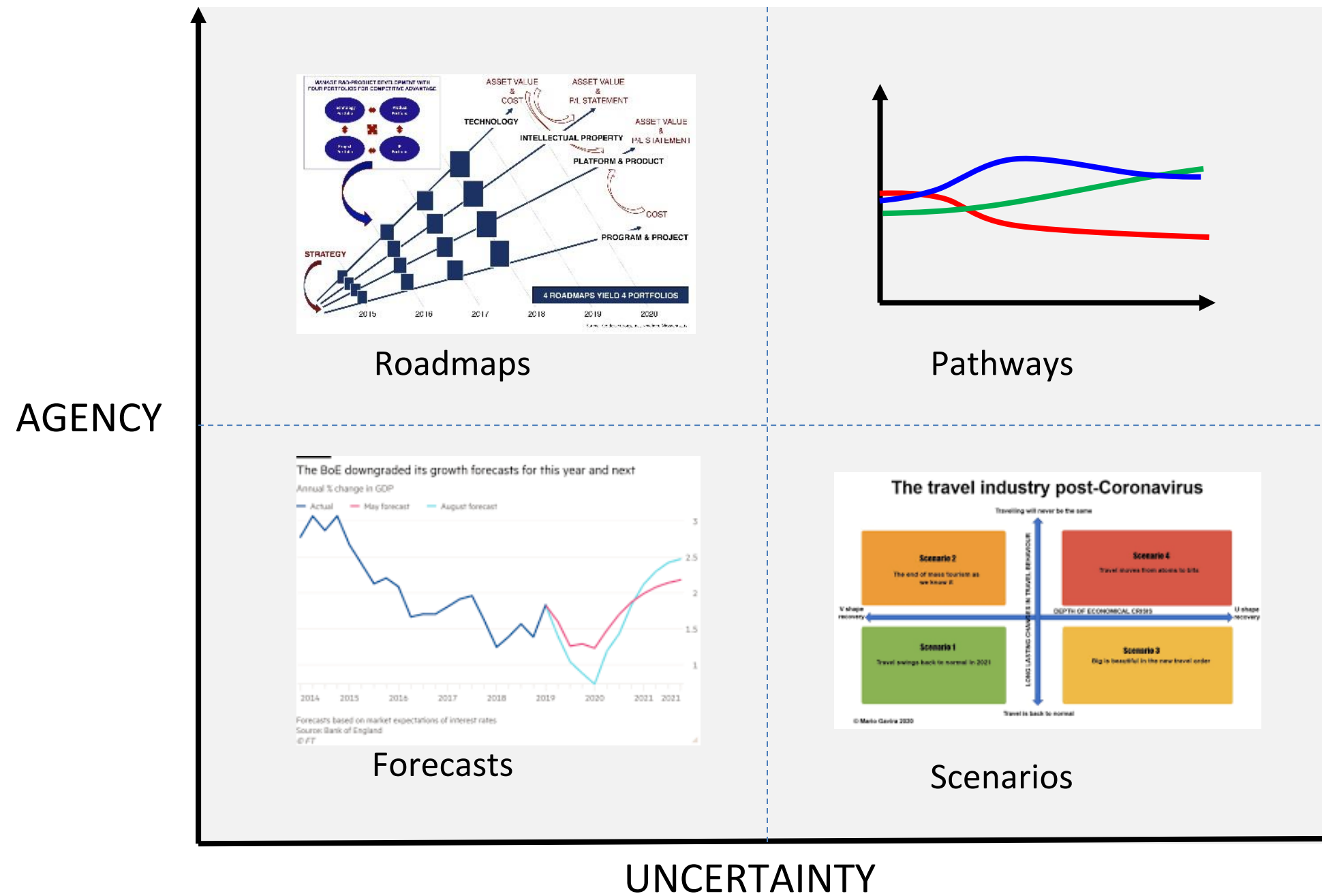


# Introduction to the 3HEi process

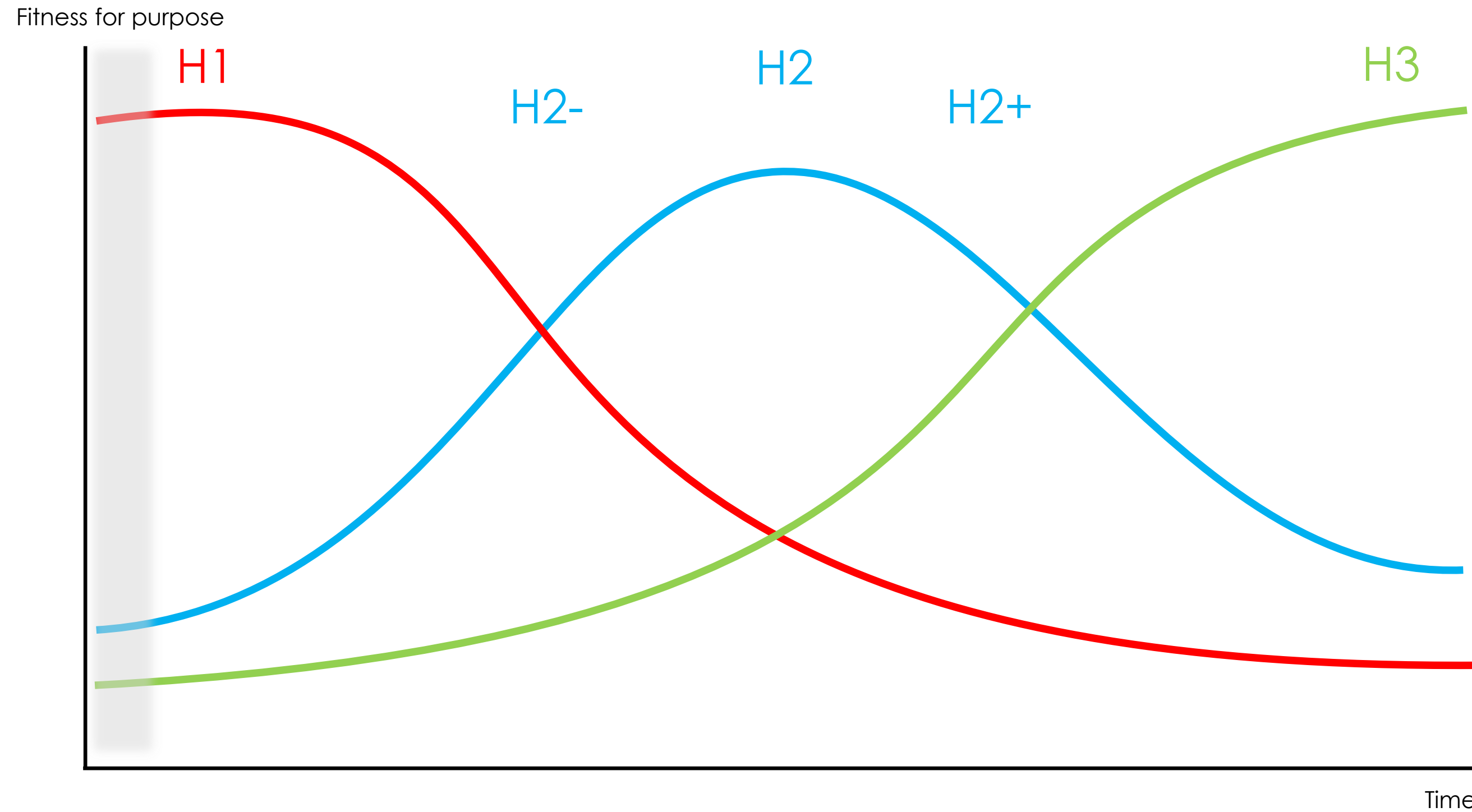
Ian Kendrick



# 4 approaches to Futures Thinking



# Thinking in Three Horizons



## The process we followed

1. Issued a Three Horizons survey to >100 selected diverse participants, 39 respondents, who generated c. 1300 individual comments / answers
2. Core team facilitated team of 18 analysts to group the 1300 comments into clusters
3. Clusters then brought together into themes within each Horizon
4. Systems maps prepared for each Horizon, showing the causal links between the themes.
5. Maps updated after respondents, Friends, SAMEA, IDEAS, Climate SMILE workshops / webinars
6. Maps refreshed to clearly include indigenous and intersectionality
7. AI used at various steps of the process

## Process step 1: Survey

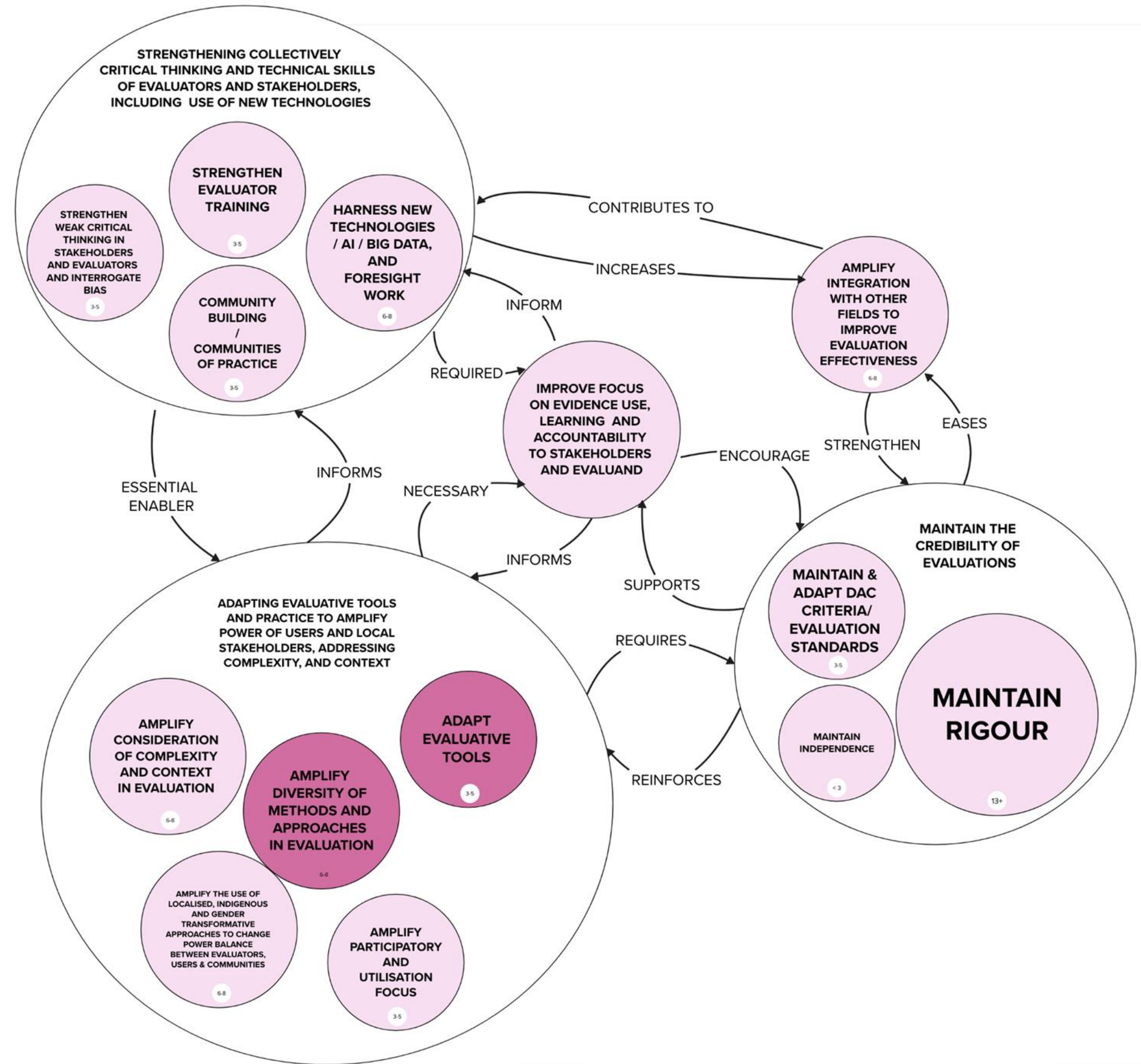
1. Collected into a spreadsheet
2. Summarised by ChatGPT
3. Reviewed by people
4. Reviewed / edited /distilled version used for the work:

<b>Question: Are there aspects of the current evaluation field that we should keep, adapt and possibly even amplify?</b>		
<b>R11:</b> Bringing multidisciplinary and diverse insights to the design of evaluations and interpretation of results is useful and should become a requirement. Using Systems maps to interrogate Theories of Change should be amplified.	H1_Q1.R11.a: Multidisciplinary and diverse insights should be brought into evaluation design and result interpretation, becoming a requirement.	H1_Q1.R11.a: Multidisciplinary and diverse insights should be brought into evaluation design and result interpretation, becoming a requirement
	H1_Q1.R11.b: Amplify the use of systems maps to interrogate Theories of Change.	H1_Q1.R11.b: Amplify the use of systems maps to interrogate Theories of Change.

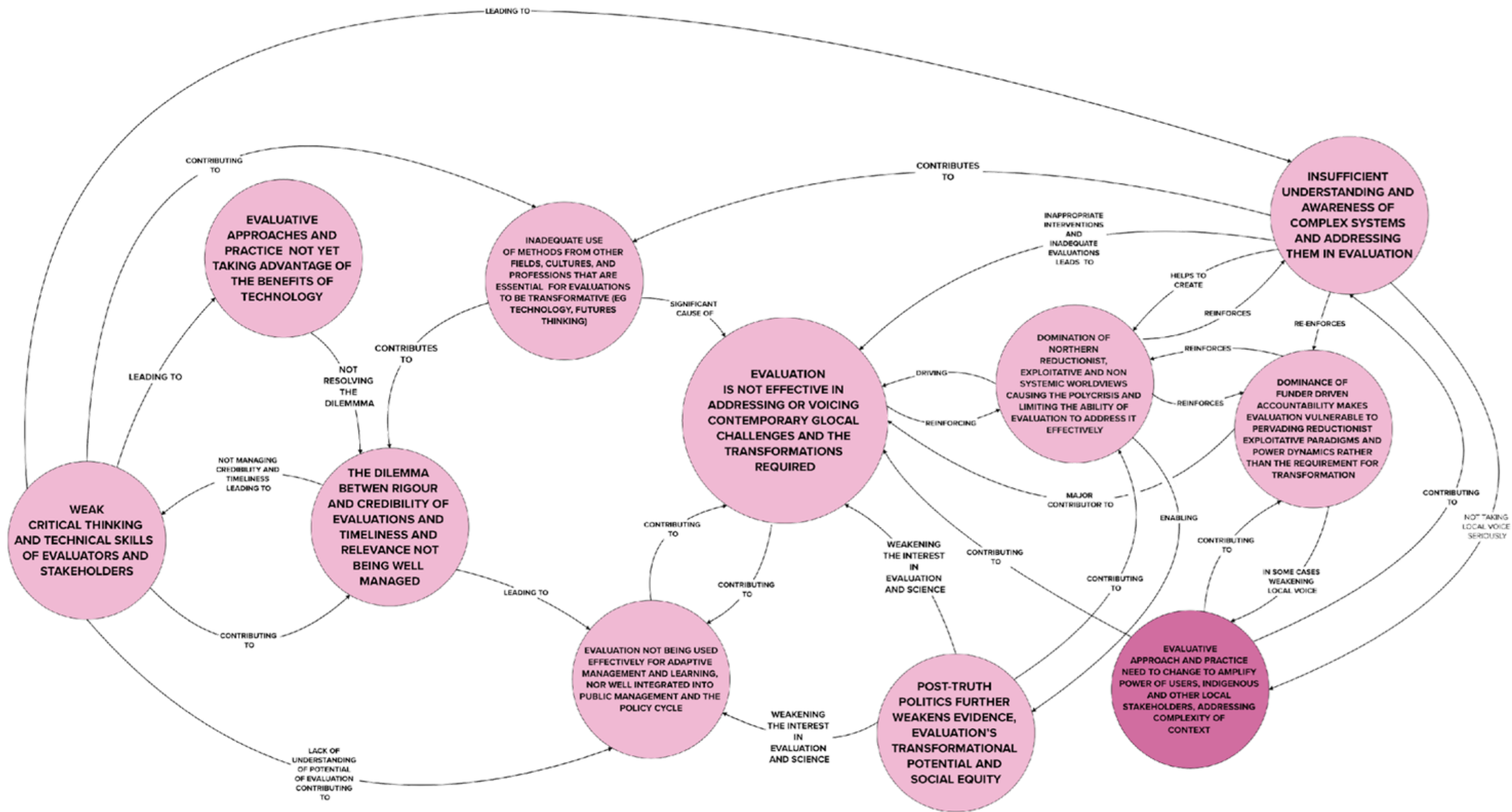
# Process step 2: Convert to clusters



# Process step 4: Cluster question responses into themes and produce initial systems map



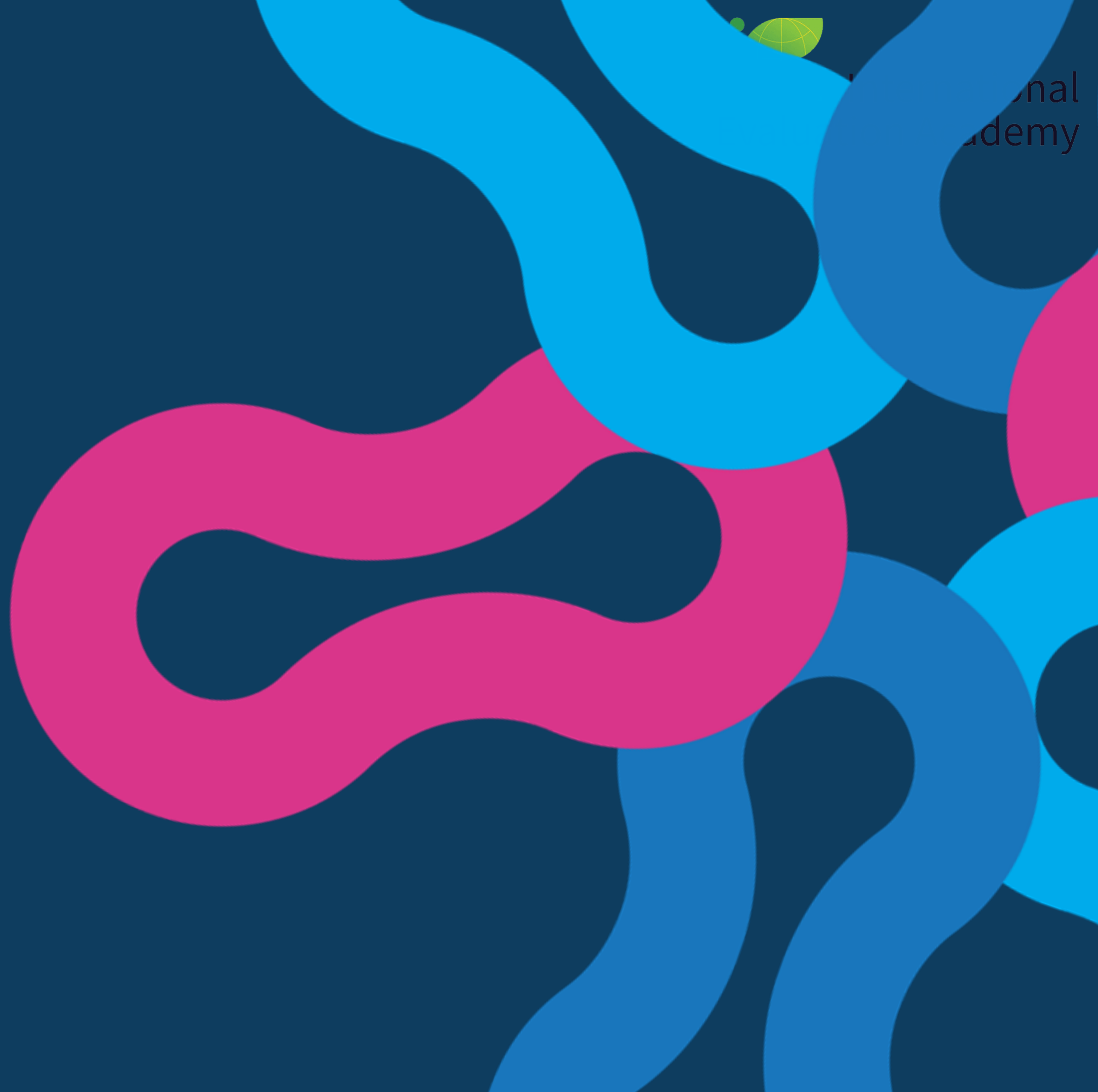
# Process step 5: Produce overall system map for each Horizon





# How we have applied AI

Silva Ferretti



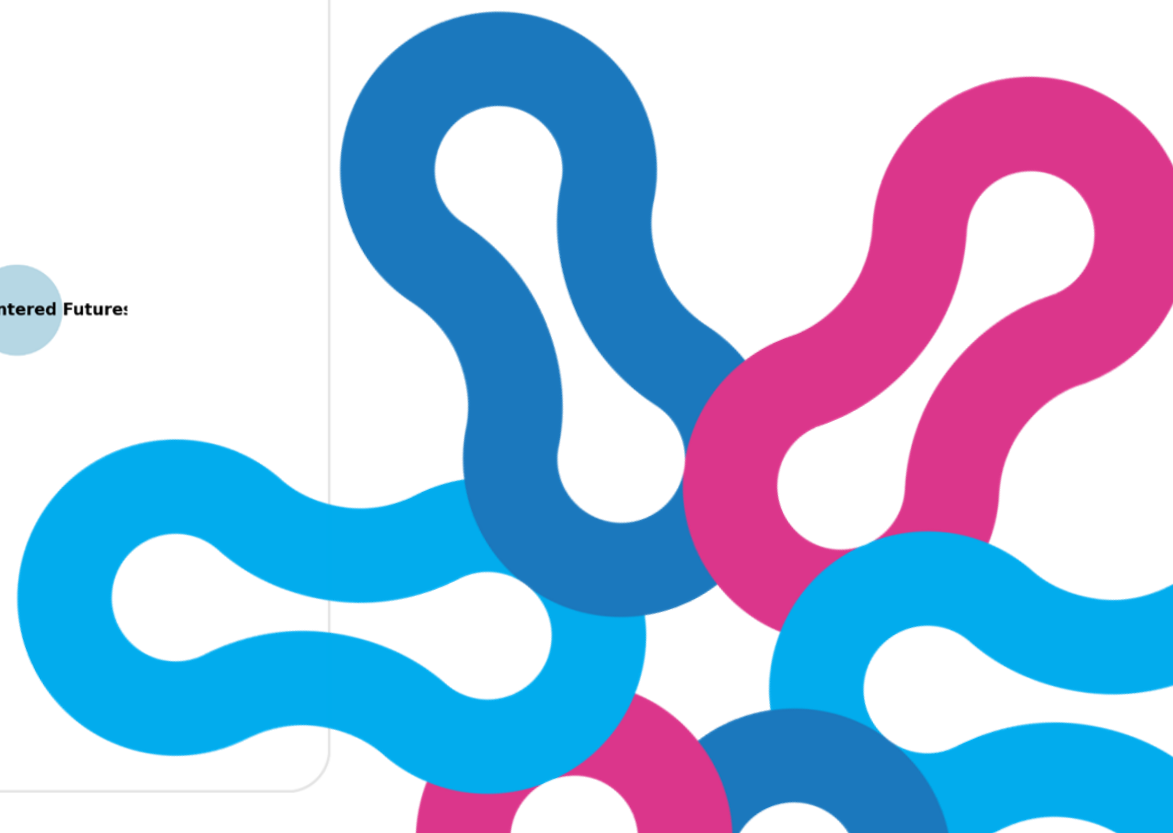
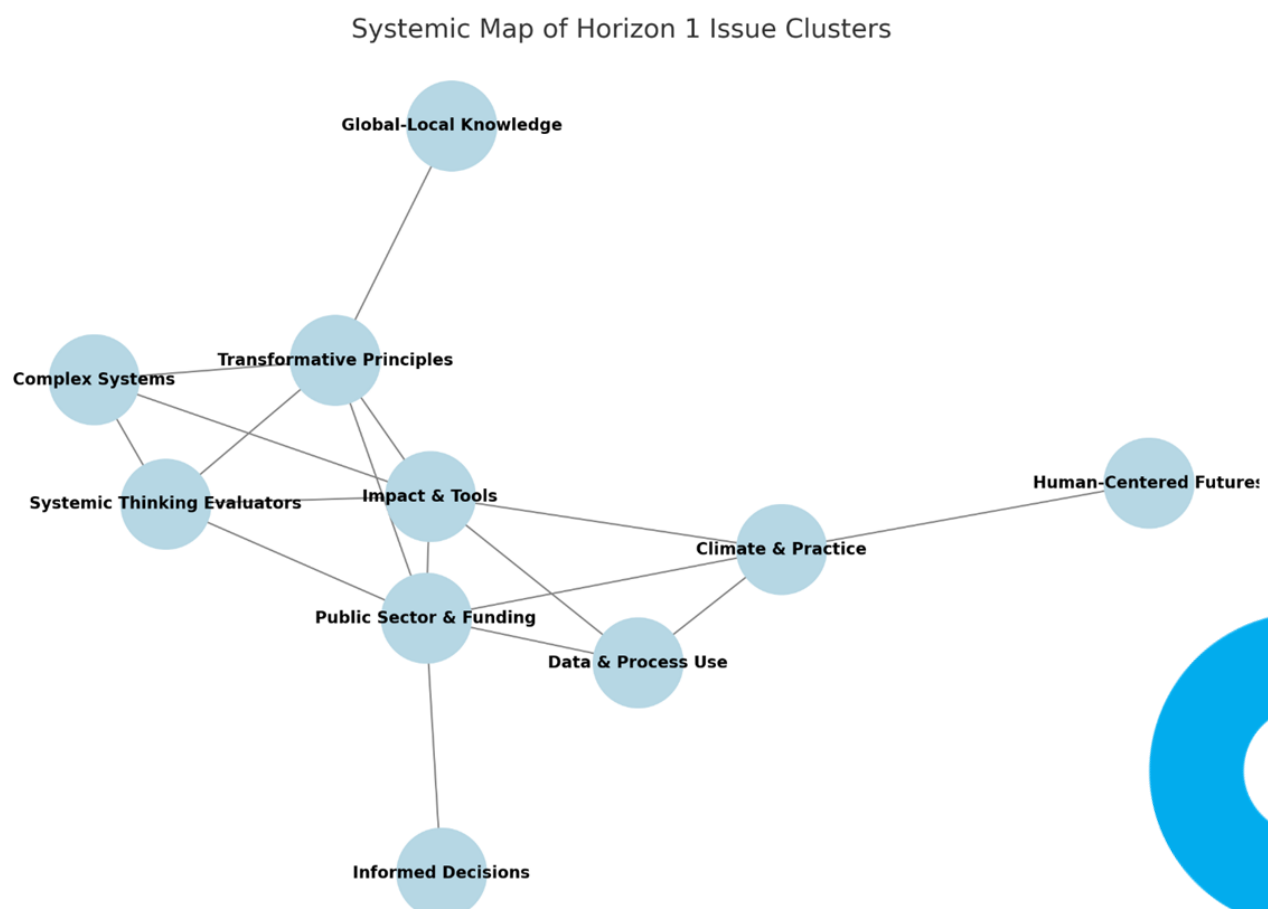
# The temptation: just do it

Analyse responses to three Horizon 1 questions. Identify at least 10 meaningful issue clusters and visualise them as interconnected systemic elements.

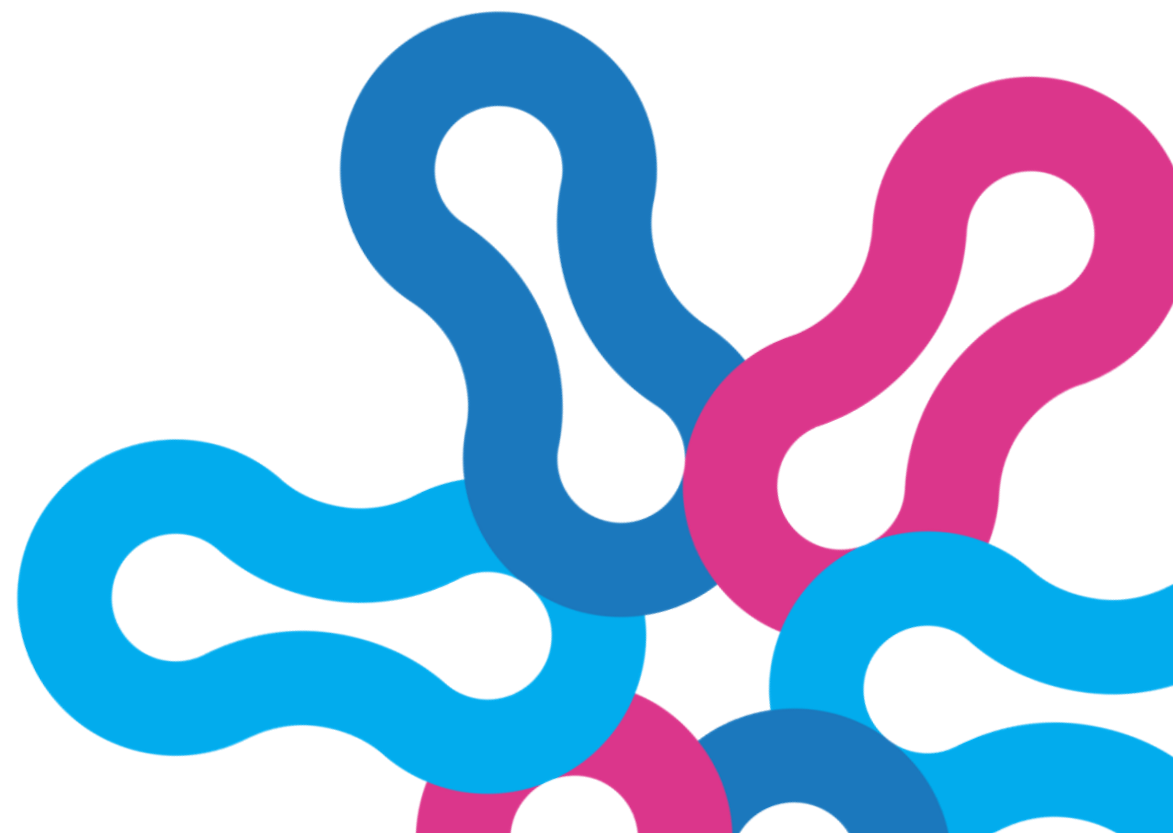
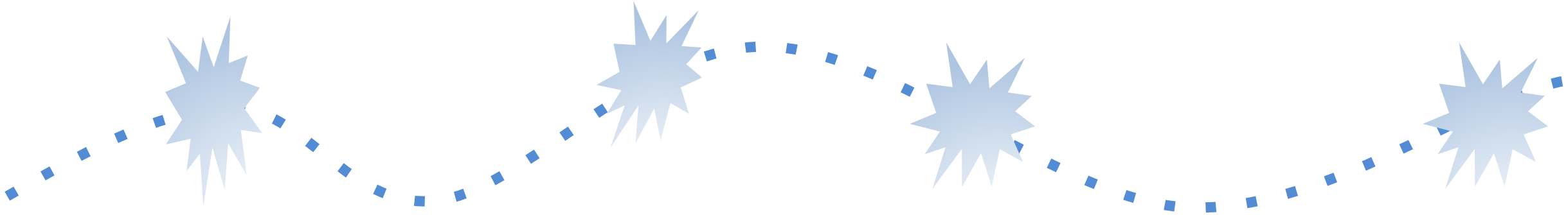
+ Tools

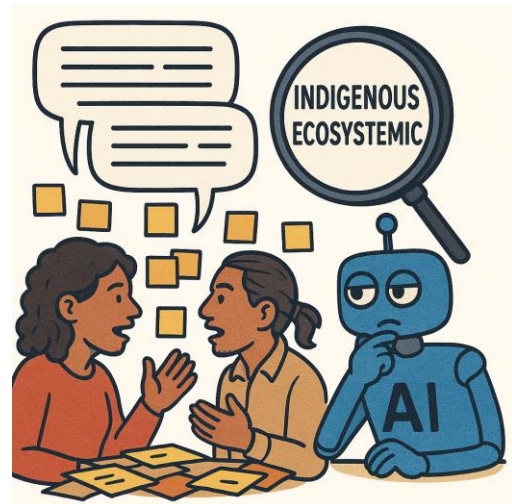


Systemic Map Of Horizon 1 Issue Clusters



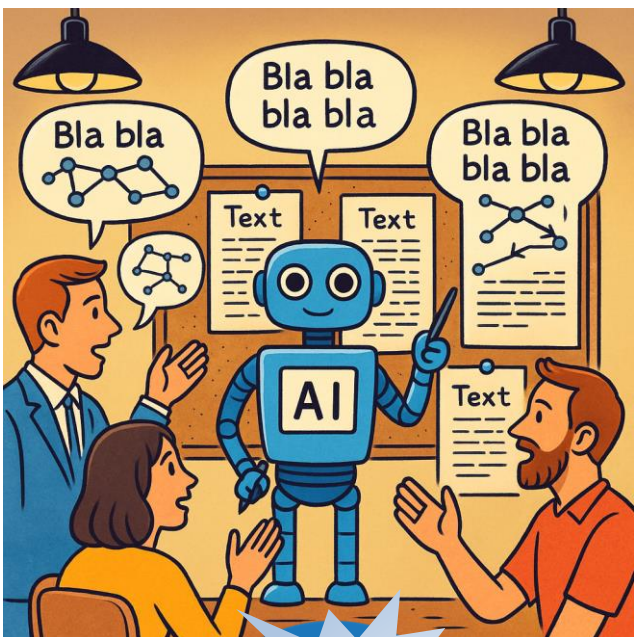
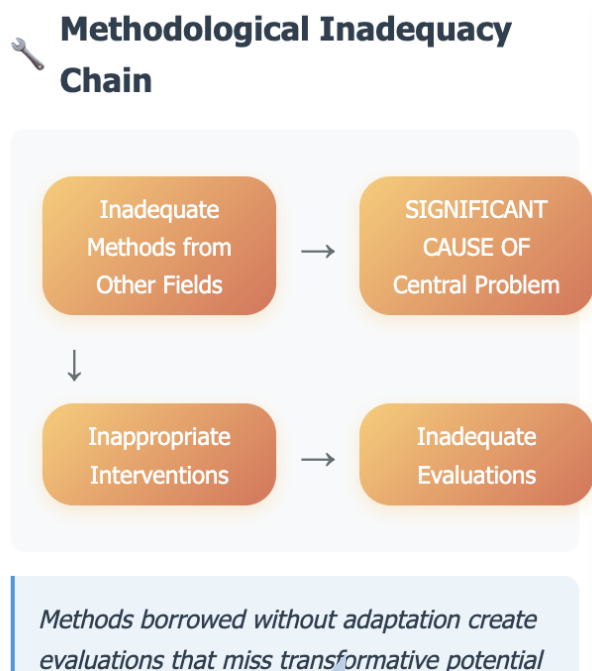
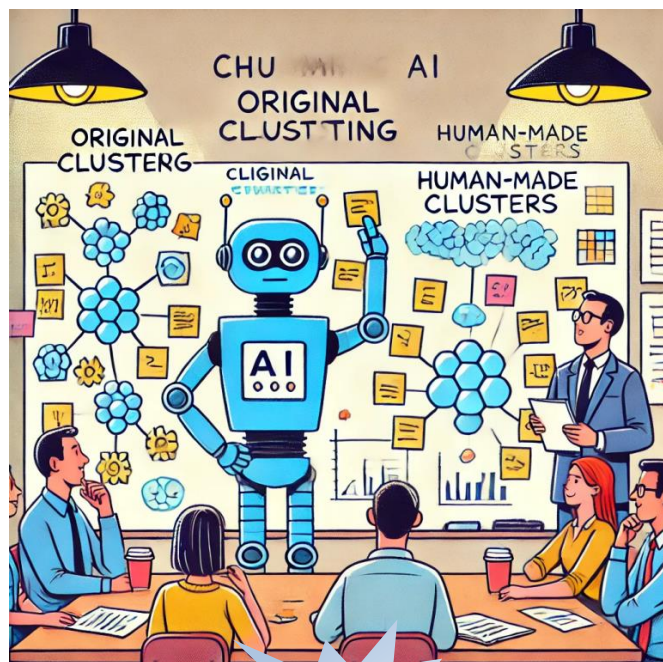
# The choice: supporting, in parallel





## Perspectives revealer

Original Response	Chat GPT summarization
R1: Not sure how to answer this question. Is it possible to make the question more simple?	Intro_Q1.R1.a: Not sure how to answer this question. Intro_Q1.R1.b: Is it possible to make the question simpler?
R2: To help us understand the effectiveness of our investment, where (in what context) they are effective, for whom and unintended consequences 2) to generate insights that we can learn and inform our investment strategies 3) to provide a framework for us to analyze scenarios (relating to policies, level of actions), understand their implications, trade-offs and 4) understand the perspectives of people	Intro_Q1.R2.a: Help understand the effectiveness of our investment: where, in what context, for whom, and unintended consequences. Intro_Q1.R2.b: Generate insights to inform our investment Intro_Q1.R2.c: Provide a framework to analyze scenarios, understand implications, and trade-offs. Intro_Q1.R2.d: Understand the perspectives of marginalized people and those benefiting from the climate crisis. Intro_Q1.R3.a: Provides the possibility of learning what is working or not and for whom.
R3: It brings the possibility of learning what is working or not, for whom, and how we can build systems, policies, and programmes that can build	Intro_Q1.R3.b: Help build equitable policies and

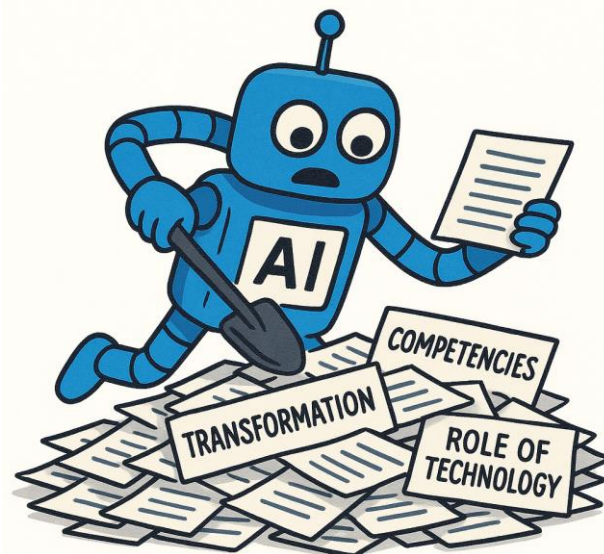


Creating "Post-its"

Clustering

Read systems

(Re) Generate narratives

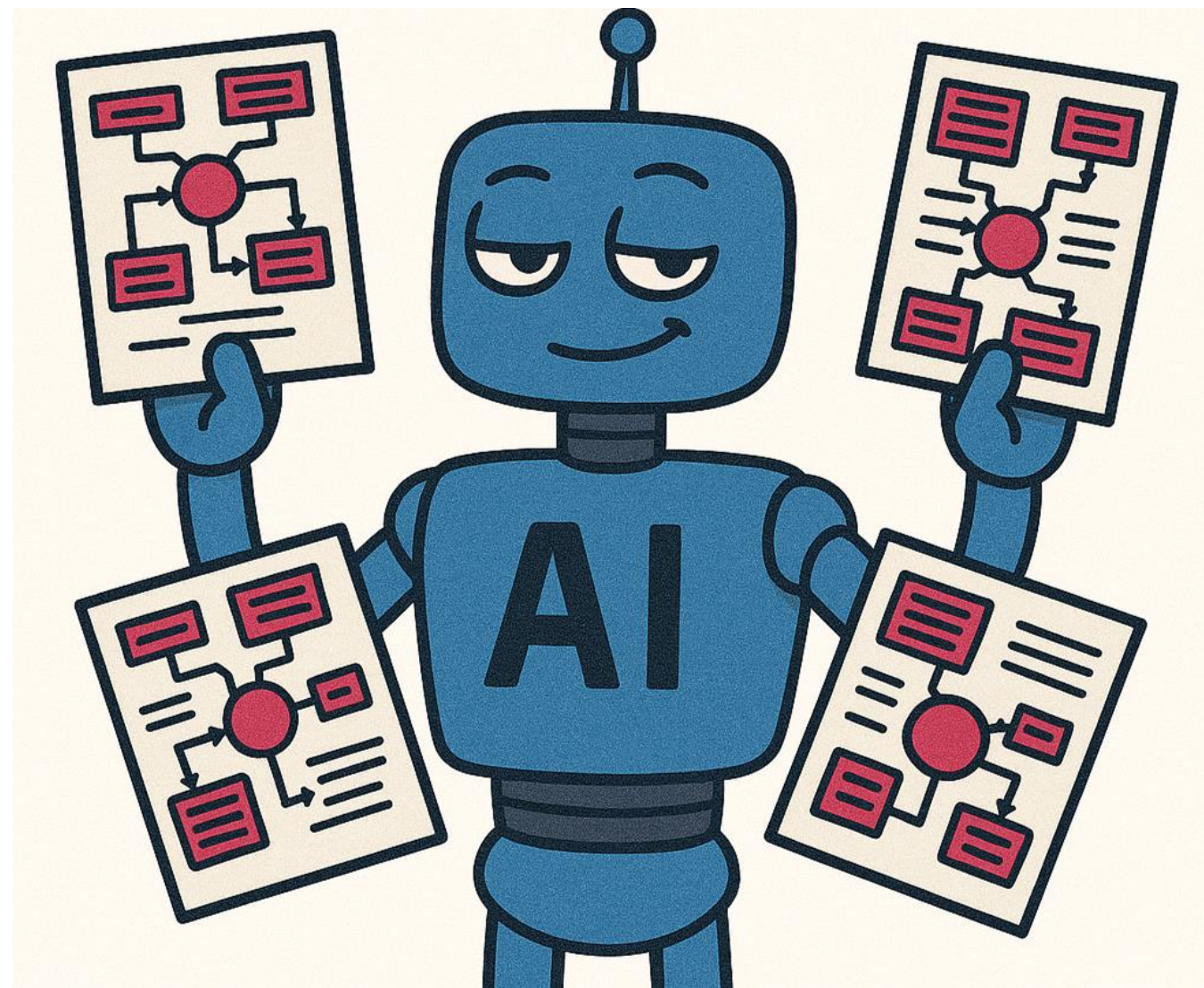


Insights digger

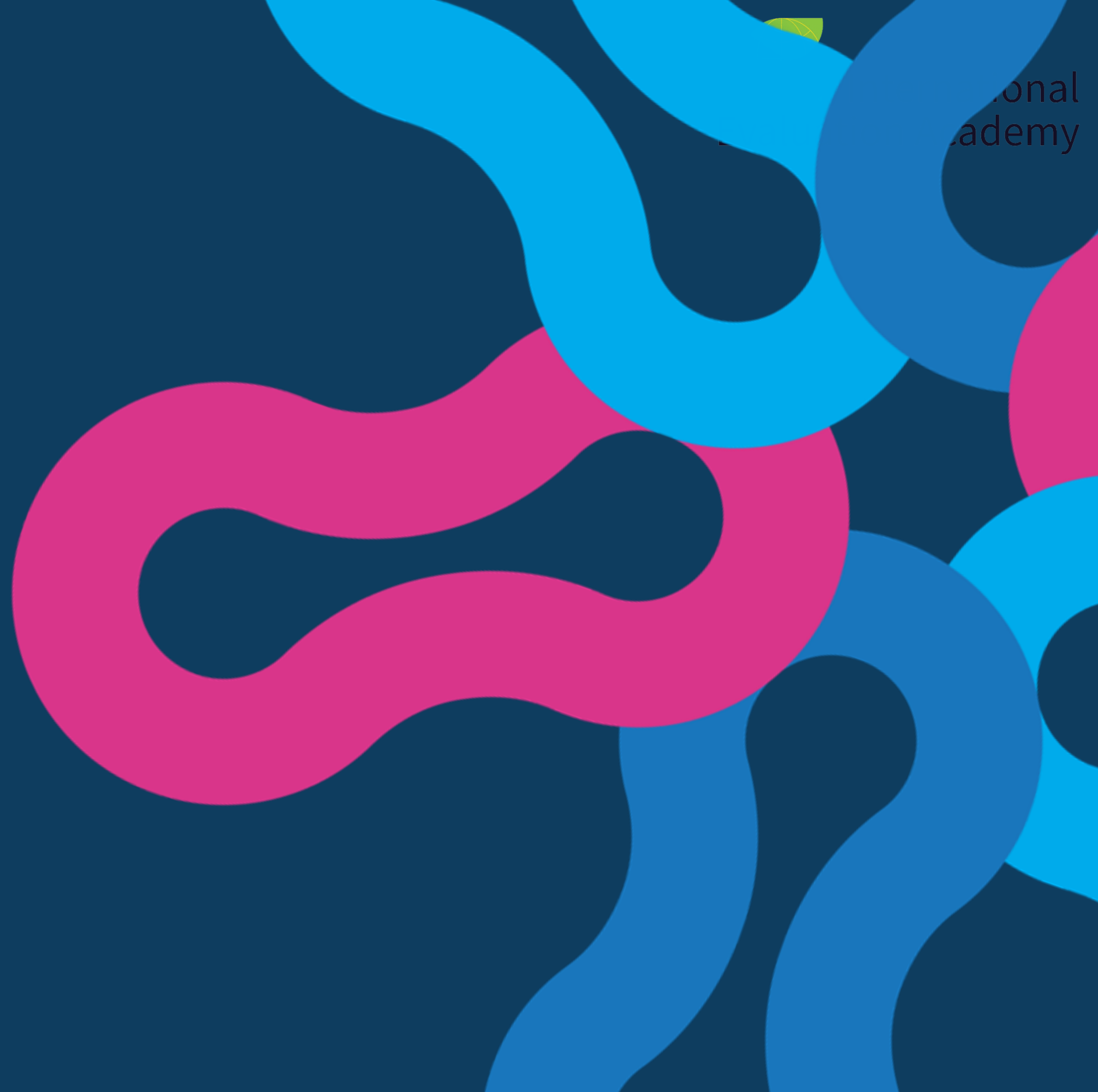


# So, couldn't we have just asked the AI?

(Largely) yes, but...



# The emerging 3 Horizon maps



# 3HEi Horizons Overview

## Horizon 1

**EVALUATION IS NOT EFFECTIVE IN ADDRESSING OR VOICING THE DEEPENING POLYCRISIS AND THE TRANSFORMATIONS REQUIRED**

## Horizon 2

**PEOPLE ENGAGED WITH OR INSPIRED BY EVALUATION ARE LEADING AND TAKING THE POWER TO CHANGE THE EVALUATION FIELD TO TRANSFORM SOCIAL-ECOLOGICAL SYSTEMS FOR A JUST AND REGENERATING PLANET**

## Horizon 3

**ALL EVALUATION CONTRIBUTES TO TRANSFORMING SOCIAL-ECOLOGICAL SYSTEMS TOWARDS A JUST AND REGENERATING PLANET**



## Horizon 3

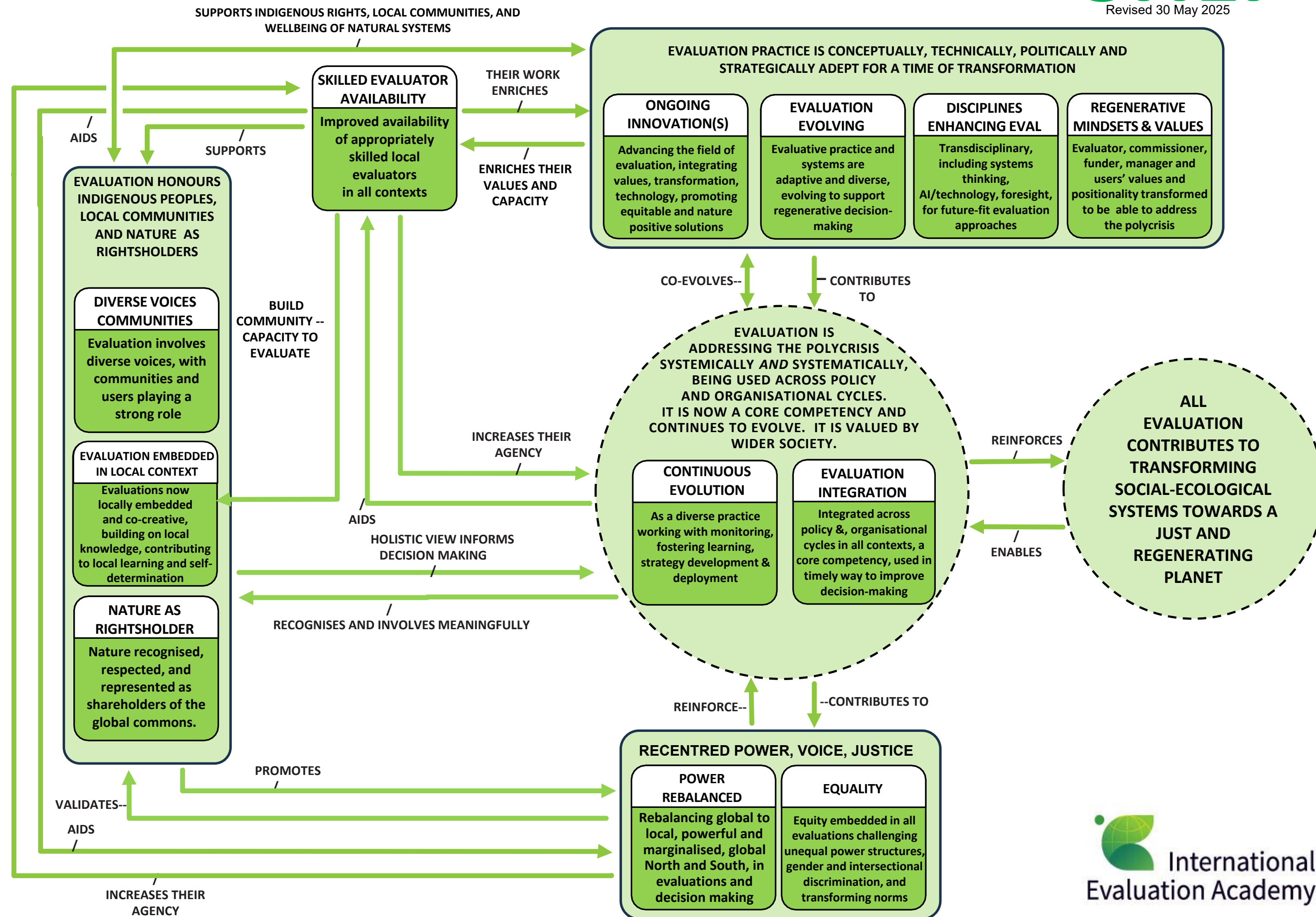
**ALL EVALUATION CONTRIBUTES TO TRANSFORMING SOCIAL-ECOLOGICAL SYSTEMS FOR A JUST AND REGENERATING PLANET**

Evaluation is addressing the polycrisis systemically and systematically, being used across policy and organisational cycles. It is now a core competency and continues to evolve. It is valued by wider society.

Evaluation practice is conceptually, technically, politically and strategically adept for a time of transformation

### SURVEY QUESTIONS

- Look and feel 10 years out**  
What does the evaluation field and its use look and feel like, now that the challenges you identified in Horizon 1 have been addressed?
- Co-Evolution**  
What do you see around you that shows that the evaluation field, as you engage in it, is interacting dynamically with emerging global and local aspects of the polycrisis?
- Present Seeds**  
Back to now, what early signs or "seeds" of this aspirational future can you see now, also known as "pockets of the future in the present"



# Horizon 2

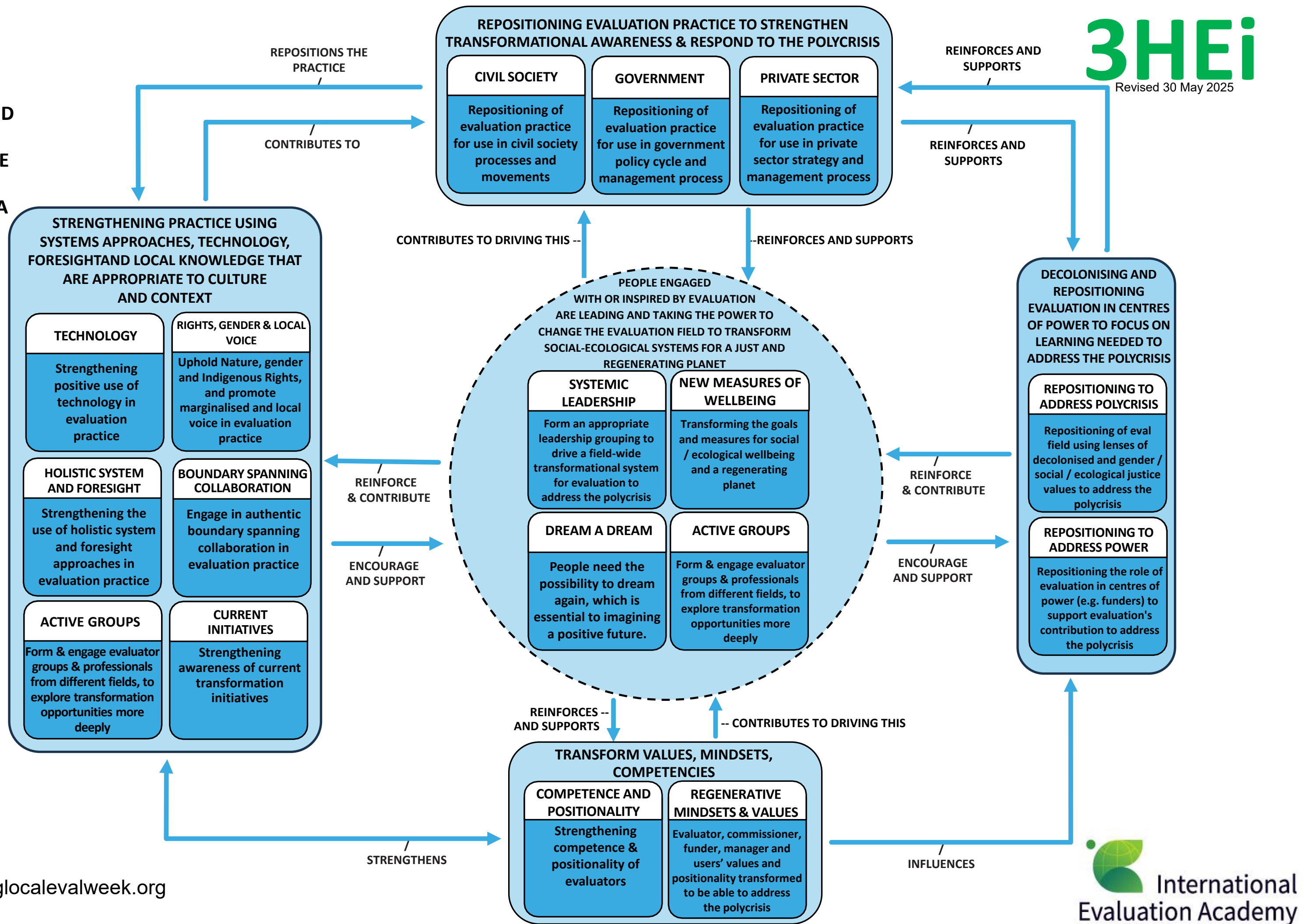
PEOPLE ENGAGED WITH OR INSPIRED BY EVALUATION ARE LEADING AND TAKING THE POWER TO CHANGE THE EVALUATION FIELD TO TRANSFORM SOCIAL-ECOLOGICAL SYSTEMS FOR A JUST AND REGENERATING PLANET

- Repositioning evaluation practice to strengthen transformational awareness & respond to the polycrisis
- Strengthening practice using systems approaches, technology, foresight and local knowledge that are appropriate to culture and context

## SURVEY QUESTIONS

- Transformative Initiatives:**  
What current initiatives can you see right now that have the potential to transform the evaluation field and move it from Horizon 1 to the aspirational future in Horizon 3?
- Future Initiatives:**  
What new initiatives do you feel should be started to help the transformation towards Horizon 3?
- Your Contribution:**  
What principles or concepts will guide your work towards H2+ initiatives and help avoid their capture by H1? Please indicate with whom you would like to collaborate.

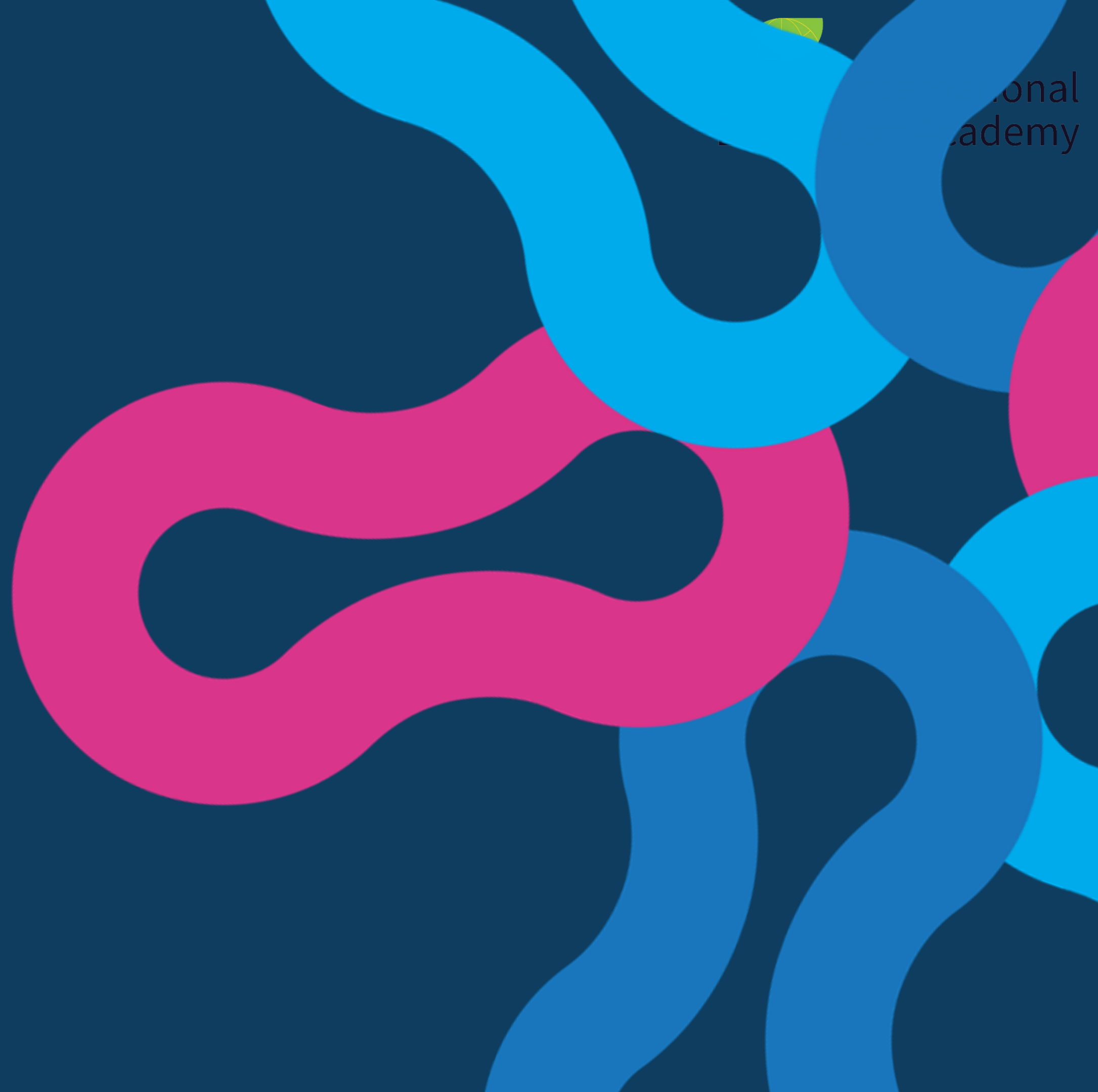
[www.glocalevelweek.org](http://www.glocalevelweek.org)



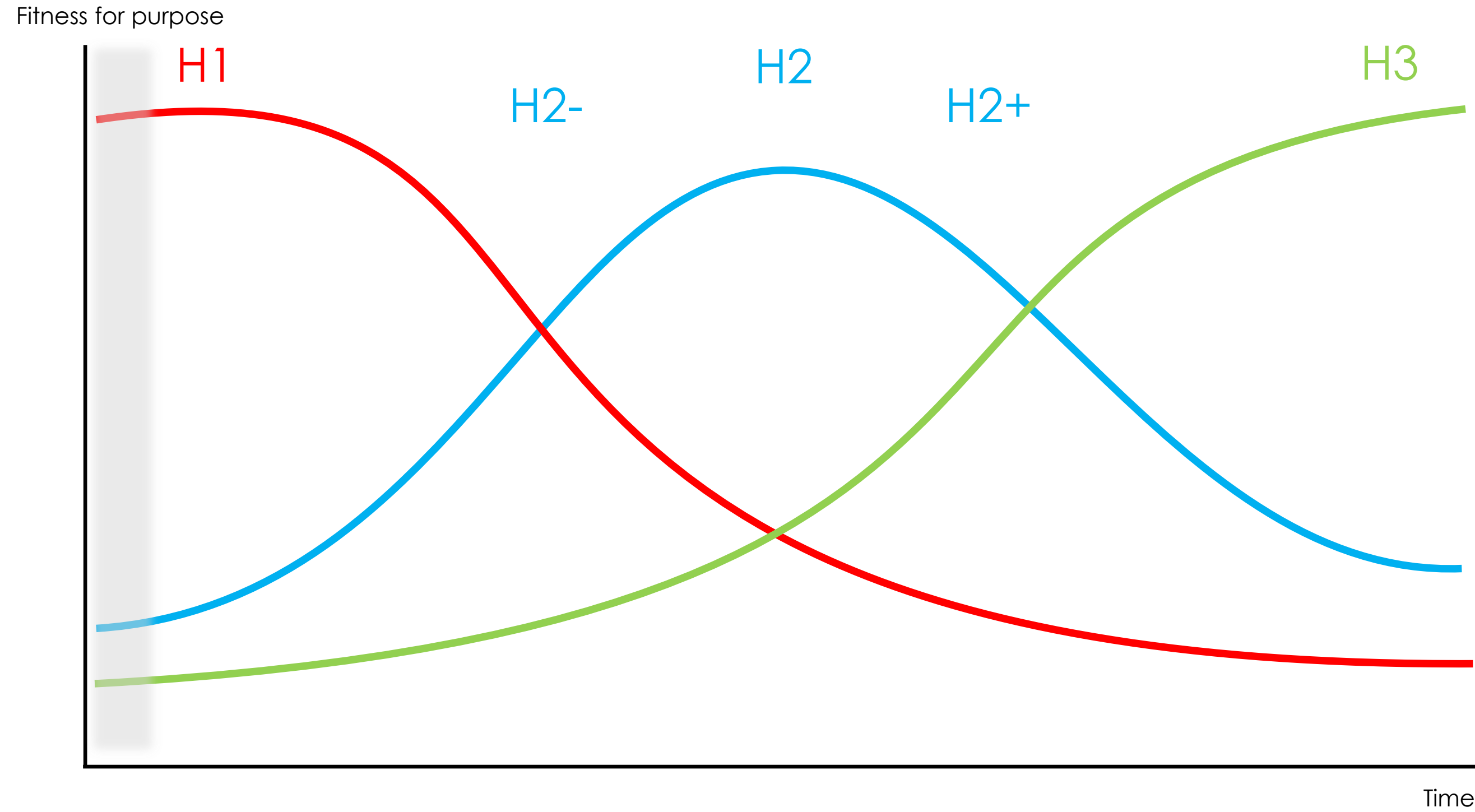
## Reflections in Mentimeter

Please on your phone  
go to [menti.com](https://menti.com) and  
enter the code  
**1353 8914**

# Identifying H2+ initiatives

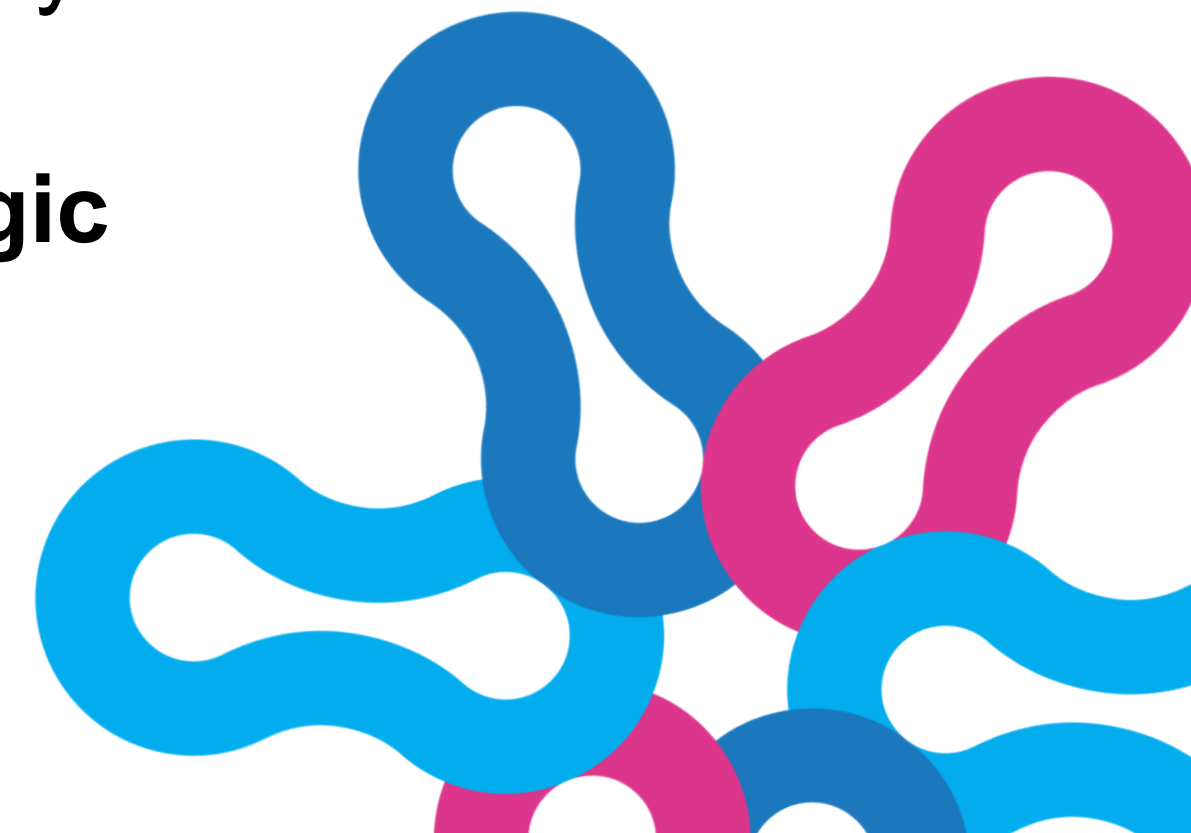


# Thinking in Three Horizons



## Characteristics of H2+ initiatives

- **Understanding H2+ pathways** and initiatives is essential if we want to design and implement for transformation.
- They should be capable of maintaining an **independent existence** – resisting capture by H1 and they alter system dynamics irreversibly. They are not just improvements or alternatives operating alongside existing structures and processes.
- They **escape capture** by the status quo and instead, lay the foundation for an aspirational future.
- They do this by destabilising and **undermining the logic of H1** while nurturing the viability of H3.



## Qualities of H2+ initiatives

- Q1 Disrupts paradigms.** Challenges core assumptions, logic and structures of dominant system.
- Q2 Embodies in action the desired future values.** Reflects the values and ethics of a desirable future in the purposes and goals pursued, and in how they are to be achieved.
- Q3 Targets deep system structures and deep/root causes.** Intervenes at key leverage points, focusing on deep reasons for systemic problems, rather than addressing symptoms. Changes who holds power, how resources and rights are distributed.
- Q4 Combines strategic vision with opportunistic action.** Aligns with long-term transformative goals while adapting tactically to 'windows of opportunity'. Exploits cracks in H1 to move towards H3.
- Q5 Emerges from within systems and local realities.** (Usually) builds on local histories, cultures and knowledge, with internal leadership and ownership. Reflects community values, not externally imposed models.
- Q6 Builds irreversible momentum.** Initiates self-reinforcing processes that make backsliding into the old system increasingly difficult. Gains credibility and institutional embeddedness that propels the transition forward.
- Q7 Reframes problems and reveals new types of solutions.** Offers a different way of understanding and defining the problem, which unlocks new types of responses.

# Characteristics of H2+ initiatives

- Q8 Thrives under challenge and adapts over time.** Shows resilience and antifragility. Strengthens through stress, opposition and/or complexity.
- Q9 Reconfigures flows and relationships.** Inspires new interactions across boundaries – sectors, disciplines, communities, geographies, generations.
- Q10 Builds cross-cutting coalitions and relationships across shared futures.** Unites unlikely partners around shared systemic attractors, not just ‘mutual interests’. Forms durable, strategic alliances that align environmental, social, economic and/or technological goals.
- Q11 Enables deep learning and identity shifts.** Supports the transformation of worldviews/mental models/mindsets, roles and identities. Encourages reflection, building new capacities and enabling a shift in how people see their agency.
- Q12 Integrates multiple dimensions of change.** Addresses systemic issues holistically rather than through narrow or technical fixes. Links environmental, social, economic, cultural and/or technological change in integrated strategies.
- Q13 Adapts and spreads without losing its essence.** Demonstrates scalability, spreading through learning and adaptation rather than ‘replication’. Evolves in diverse settings while maintaining its transformational intent.

## What are examples of H2+ initiatives you are aware of (or ones you think we should be doing?)

In the chat, please suggest ideas for H2+ initiatives you are aware of.

- If existing please put initiative name, weblink if you can
- If new – the idea
- With both, add your email

We will now organize these on a Mural whiteboard and follow up with you afterwards to get more information and to position them on our Horizon 2 map.



# Horizon 2

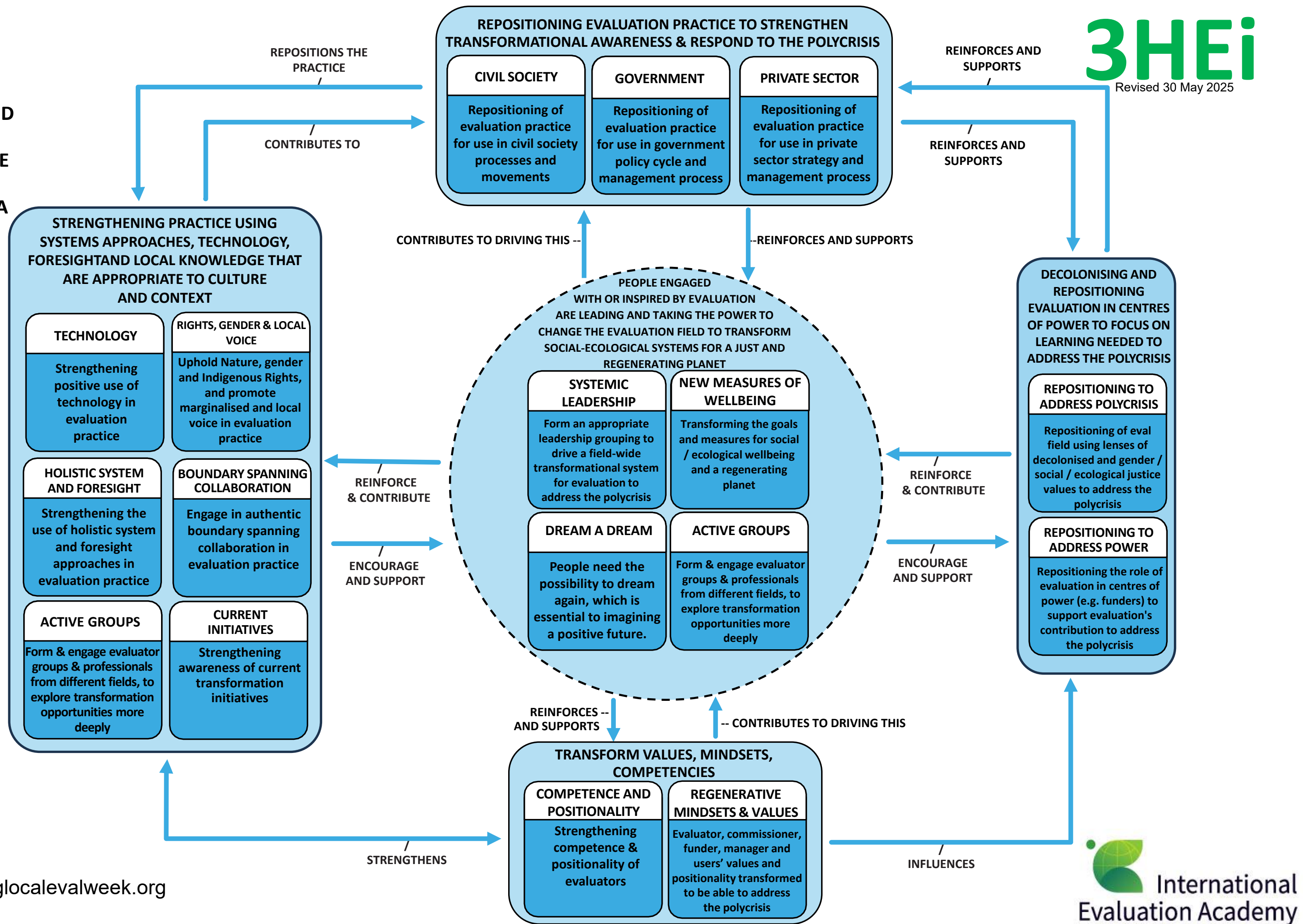
PEOPLE ENGAGED WITH OR INSPIRED BY EVALUATION ARE LEADING AND TAKING THE POWER TO CHANGE THE EVALUATION FIELD TO TRANSFORM SOCIAL-ECOLOGICAL SYSTEMS FOR A JUST AND REGENERATING PLANET

- Repositioning evaluation practice to strengthen transformational awareness & respond to the polycrisis
- Strengthening practice using systems approaches, technology, foresight and local knowledge that are appropriate to culture and context

## SURVEY QUESTIONS

- Transformative Initiatives:**  
What current initiatives can you see right now that have the potential to transform the evaluation field and move it from Horizon 1 to the aspirational future in Horizon 3?
- Future Initiatives:**  
What new initiatives do you feel should be started to help the transformation towards Horizon 3?
- Your Contribution:**  
What principles or concepts will guide your work towards H2+ initiatives and help avoid their capture by H1? Please indicate with whom you would like to collaborate.

[www.glocalevelweek.org](http://www.glocalevelweek.org)



# Where to from here



## Next steps

- We will share the maps/presentation with you and invite you to **keep identifying H2+ initiatives** and sharing these with us.
- Share a **Storymap** so you can interact with the maps and share the link.
- Share maps with the wider community 3-4 July, and use them to further **identify and position potential current or potential H2+ initiatives** upon which we could build.
- Use these initiatives as a foundation for how we will **take this transformational systems change forward**.
- Build with partners (including global, like EvalPartners and national like SAMEA/CES) with a series of **work packages** to collaborate on and take different catalytic areas of the work forward.
- Use JMDE articles** to test the maps, elaborate how they need to be taken forward, and refine them as new knowledge emerges.
- Continue to **refresh the maps** and evolve as a living exercise that responds to the changing environment
- Reflect on the learning from this for **using foresight tools** to support evaluative processes (including training with EES in June).

Please go back to the Mentimeter code and add how you feel now





global  
evaluation  
initiative



International  
Evaluation Academy

# Thank you!