

Monitor Institute
by **Deloitte**.

Adjacencies & Hypotheticals

Developing common standards to reduce the reporting burden

More effectively
putting decision
making at the center

The Common Application is an undergraduate college admission application that applicants may use to apply to more than 700 member institutions from around the world. The Common Application reduces the administrative burden on students for low-value tasks (e.g., data entry), allowing them to allocate more time to high-value tasks (e.g., essays), while still enabling member institutions to collect information core to their decision processes through supplemental information requests.

What would it look like if funders could agree on common standards that eased the reporting burden on grantees?

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*Crowdsourcing data
collection automatically*

More effectively
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making at the center

Weathersignal.com is a new way of collecting weather data, using sensors in smartphones to crowdsource weather information. The live updating map of weather conditions is based entirely on information passively shared by users' phones, such as temperature, pressure, light intensity, and humidity. While the initial focus is to accurately "nowcast" localized weather maps, the long-term objective is to be able to use the data to improve weather predictions.

What would it look like to use performance data that could be collected automatically to make reporting easier for grantees?

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*Automating low-value
tasks to improve data
quality and insights*

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The analytics team at the **Phoenix Suns** worked with the coaching staff and front office to reach consensus on which data would be of most use to the staff along with how to categorize it. This required coaches and front office personnel to acknowledge uncertainty surrounding some of the data being presented, especially in the cases of small sample size and where rules might vary from team to team. This agreement allowed the analytics team to automate low-value tasks, such as tracking the outcome of each possession, which enabled them to use data visualization software to regularly provide coaches and front office with detailed reports analyzing success on a per possession basis.

What would it look like if funders and nonprofits could use technology to automate low-value tasks?

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*Providing easy access to
"good enough" services*

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making at the center

Retail clinics like are primary care clinics that operate inside of stores. They can diagnose and treat illnesses, provide preventative care, and even offer basic chronic condition management services. By providing accessible healthcare services at competitive prices, with an emphasis on low complexity conditions affecting the majority, retail clinics provide patients with new choices when consuming healthcare services.

What would it look like to do "good enough" evaluation that made the process more accessible and useable for grantees?

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*Improving capacity by
borrowing resources
from which to learn*

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Through **Code for America's** fellowship program, professionals in the technology industry are able to apply their skills to government through a full-time paid year of service. Multi-disciplinary teams with experience in engineering, design, user experience, research, GIS and product management help create technology solutions to government problems and build capacity among local government teams.

What would it look like if there was a widespread effort to embed evaluation expertise in nonprofits?

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*Using technology to
increase access to
specialized expertise*

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making at the center

Project ECHO is an initiative to make specialized medical knowledge accessible regardless of location. Local clinicians are paired with specialist teams at academic medical centers in weekly virtual clinics, to share knowledge and expand treatment capacity, resulting in better care for more people. By using its virtual clinic model, the initiative has now expanded from its original focus on treatment for hepatitis C to now address more than 55 diseases in more than 20 countries.

What would it look like to use technology to spread specialized evaluation expertise to organizations that couldn't otherwise afford it?

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*Creating a widespread
culture of learning*

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Intuit has created experimentation platforms for all their workers, ranging from customer support to logistics and marketing. Workers across the company are encouraged to brainstorm many possible solutions and then quickly test the best ideas, creating an environment where people can rapidly learn and are allowed to fail.

What would it look like if funders built platforms for grantees expressly focused on facilitating experimentation and learning?

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*Sharing expertise in a
cost-effective manner*

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In the late 1990s, **Bay Area funders** hired “circuit riders”—technology assistance providers who rotated through a “circuit” of nonprofit organizations in a region or field, doing everything from setting up computers networks and creating databases to advising on overall IT strategies. The circuit riders also helped “cross-pollinate” across organizations, transferring insights and tools, and cost-effectively re-using training materials and resources across multiple organizations.

What if funders supported evaluation “circuit riders” who could cost-effectively rotate through a number of nonprofit organizations to provide individualized assistance?

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*Aggregating data for
real-time decision
making*

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making at the center

Waze is a community-based traffic and navigation app that allows drivers to passively share real-time traffic and road information. Waze aggregates the information it receives to develop a more accurate picture of traffic patterns, which improves the quality of daily commutes. Waze has also begun to move to predict future traffic patterns for “planned drives,” further improving the driver experience and congestion around high density areas.

What would it look like if the data infrastructure existed to provide real-time information across a large number of social sector organizations?

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*Using predictive
analytics to anticipate
challenges*

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making at the center

The **Pennsylvania Bureau of Child Support Enforcement** built a predictive model that yielded a “payment score calculator” to estimate how likely individual parents are to meet their child support commitment. Because the system shows the drivers of a low score, caseworkers can address potential problems —such as explaining the importance of contacting the agency in case of job loss — and suggest programs to help struggling parents.

What would it take to widely use predictive analytics in the social sector?

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Adjacencies & Hypotheticals

*Setting up systems for
handling and learning
from failure*

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“Online retailer **Zappos** has become a fan favorite by flipping expectations of online shopping: easy returns for shoes that don’t work out, and positive customer service experiences that counter the norms of endless phone call runarounds or pleading to talk to supervisors when things go wrong. By solving for these classic roadblocks and reducing—even eliminating—potential downsides, they make it easy and appealing to do what used to seem unthinkable: ordering shoes online, sight unseen.”

What would it look like—and what would it take—for funders to truly incentivize a learning mindset instead of a fear of failure from grantees?

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Adjacencies & Hypotheticals

*Using new technology
to see large scale
patterns*

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TerrAvion, an aerial image delivery service, makes multiple flights weekly to capture bird's-eye and thermal photographs of farms and ranches. The imagery enables ranches like TomKat Ranch, an environmentally sustainable cattle ranch, to spot early-warning signs of overgrazed areas and invasive species and make decisions about where cattle should graze next.

What would it look like if funders focused on capturing high level patterns across grantees that could be used to inform the work of everyone involved?

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*Tying a "brand" to an
aspiration*

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Harley-Davidson has marketed its motorcycles not just as a means of transport, but as a lifestyle choice. Riding Harley Davidson motorcycles is associated with being rebellious and having the freedom to make your own choices.

What would it look like if the evaluation "brand" were more widely identified with staff "destination" aspirations to deliver impact rather than on "journey" efforts?

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*Designing a holistic user
experience*

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In 2008, **Disney** developed a way to streamline the experience of their amusement park guests. The “Magic Band” is a wristband with a radio transmitter that is worn by guests and streams data about where guests are in the park and what they’re doing. It enables guests to easily gain access to the park’s attractions, FastPass entrances, and their hotel rooms, as well as automatically purchase food and merchandise without waiting in line. The “Magic Bands” were designed to remove friction from the park experience.

What would it look like if monitoring and evaluation in the social sector were designed to “delight” constituents or grantees?

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*Encouraging
engagement by focusing
on the fun factor*

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Fun Theory's **Piano Staircase** used whimsical technology to encourage people to make a healthier choice. After a subway staircase was turned into a piano by having people "play" different notes by stepping on each stair, 66% more people chose the stairs over the escalator.

What would it look like to make measurement, evaluation, and learning more fun?

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*Building buy-in through
personal engagement*

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The “**Ikea Effect**” is the term given to the finding that consumers place a disproportionately high value on products they create themselves. The very act of adding one's own labor makes it more valuable to the individual.

What would it look like for philanthropy to better engage stakeholders in measurement efforts as a way of getting them to feel ownership of the process?

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*Making data collection
and sharing easier*

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Sage Bionetworks and University of Rochester Medical Center

scientists created an iPhone app to collect sensor and survey data on dexterity, balance and gait, and memory from Parkinson's patients. More than 60,000 people have downloaded the app, and it has become one of the largest studies of the disease. Participants were able to agree in advance to have their data broadly shared with researchers, providing a new and streamlined way to obtain information for multiple studies without burdening patients.

What would it look like if constituents could easily opt in to anonymized datasets that enabled learning across multiple grantees?

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Adjacencies & Hypotheticals

*Making data collection
automatic to ensure
data quality*

More effectively
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AIR Louisville created a database of the city's asthma hotspots by distributing asthma inhaler-attachments with special sensors that track when and where the inhalers are used. The sensors wirelessly sync with the user's smartphone, and the phone automatically captures the data from the sensor whenever it is nearby. With this data, the city was able to better understand and take steps to decrease asthma triggers.

What would it look like for funders and nonprofits to use technology with constituents to automate data collection as a way to ensure data accuracy?

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Adjacencies & Hypotheticals

*Improving performance
by making behavior
visible*

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making at the center

The infection team at the **Henry Ford Health System** found that sharing images of bacteria on common surfaces substantially increased the hospital staff's hand-washing rates. The images shared with the hospital staff revealed bacterial growth on items like unused gloves, doorknobs, a mobile phone, and hands. According to a study of the effort, one unit improved its hand-washing rate by nearly 50% after the images were shared.

What would it look like for funders to make the impact of bad performance more visible as a way of promoting better practices and results?

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Adjacencies & Hypotheticals

*Using behavioral nudges
to improve data input*

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making at the center

The **State of New Mexico's Department of Workforce Solutions** implemented a new system to reduce improper unemployment insurance payments. Potentially problematic cases are identified using predictive analytics. For these cases, the system then uses behavioral economics "nudges" to encourage individuals to report accurately at key moments in the filing process, such as in reporting earnings.

What would it look like to use behavioral "nudges" to encourage more active and accurate nonprofit data collection?

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*Recognizing the
value of data*

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Datawallet, an online marketplace for data that empowers individuals to take control of their own data. Once an individual signs up, Datawallet collects that individual's data, anonymizes it, and produces analyses. When companies buy the data, Datawallet pays the users who generated that data, instead of the revenue being diverted to data brokers.

What would it look like for social sector organizations to recognize the value of constituent data—and to behave accordingly?

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Adjacencies & Hypotheticals

Isolating key metrics to focus on what matters for decision making

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Lean Analytics, a resource on analytics for start-ups, promotes the iterative use of “One Metric that Matters” to enable quick-cycle learning and adaptation. At any point in time, there’s one metric organizations should focus on improving above all else. This forces the organization to prioritize and enables the team to iterate continuously and learn in a methodical way.

What would it look like if organizations piloted iterative, one-metric approaches to enable key priorities to remain at the center of operations?

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Adjacencies & Hypotheticals

*Innovating new ways of
creating and sharing
evaluation findings*

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Evaluation reports often sit on shelves after they're completed.

What could it look like if "after-the-fact" evaluation reports became obsolete?

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Adjacencies & Hypotheticals

*Prioritizing the creation
of new knowledge*

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We often talk about “evidence-based decision making.”

What would “decision-based evidence making” look like?

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Adjacencies & Hypotheticals

*Making learning central
to foundation missions*

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Actionable knowledge can be as important to social change efforts as money.

What could it look like if more foundations operated as "learning foundations?"

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Adjacencies & Hypotheticals

*Embracing risks by
adopting a venture
capital mindset*

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Failure is often frowned upon in philanthropy.

What could it look like if funders adopted a venture capital mindset, spread their bets over more risky investments, and acknowledged that many would fail?

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Adjacencies & Hypotheticals

*Emphasizing peer
learning for capacity
building*

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Nonprofits consistently report needing more assistance with building data-driven cultures.

What could it look like if experienced nonprofits paired with less experienced nonprofits to act as mentors and coaches for monitoring, evaluation, and learning?

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Adjacencies & Hypotheticals

*Taking capacity building
seriously*

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Nonprofits consistently report having insufficient time and money for knowledge-building activities.

What could it look like if nonprofits weren't starved for monitoring, evaluation, and learning resources?

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Instructions

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INSTRUCTIONS

You can flip through this deck yourself to spark ideas or use it for group brainstorming. For group brainstorming:

- **Identify a monitoring, evaluation, and learning challenge** for which you'd like to brainstorm solutions.
- **Deal out the full deck of cards around your table.** It doesn't matter if people have slightly different numbers of cards in their hand.
- **Look at your hand of cards.** For each card, think about the adjacency described and consider: What are the key attributes of the adjacency? How is it similar to your challenge?
- **Choose the cards with the adjacencies that are most interesting to you.** Why is it interesting? How could you adapt the solution to your challenge?
- **"Play" the cards at the center of the table.** Explain the adjacencies you chose to the group, and tell why you chose them and what connection they have to your challenge. Go around the whole table, with each person playing their cards. Don't take more than 30 seconds explaining each card to your group.
- **Discuss the cards on the table. Identify solutions related to each adjacency.** Record key insights and potential solutions on a flip chart.
- **Share back with the full group** if you've broken up into different groups.

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