

# Bright spots

## More effectively putting decision-making at the center

Bright spots offer critical models for innovation in monitoring, evaluation, and learning. This section provides multiple examples of bright spot organizations that are already succeeding or showing promise in more effectively putting decision-making at the center. These are meant to provide inspiration and examples of how innovative practices have actually been implemented.

### 1

## Information for on-the-ground decision-making is prioritized

- *Reducing grantee reporting burden through a blended mix of in-person and online approaches*

**DentaQuest Foundation**, a corporate funder focused on promoting oral health in the United States, lessens the reporting burden on grantees by paying significant attention to making its evaluation requirements useful for the grantee. DentaQuest provides opportunities for grantees to shape their overall evaluation strategy and approach, invites (rather than requires) grantees to participate in learning-focused monitoring and evaluation efforts led by its external evaluator, and encourages grantees to develop reporting and evaluation products (such as videos and communication collateral) that allow grantees to share their impact not only with DentaQuest but with their local stakeholders. The intention is to balance accountability and learning and make evaluation processes and products useful tools for the grantees to advance their strategies—in effect, building reporting requirements into the kinds of data-collection efforts that the grantees would have wanted to pursue anyway to guide decisions on interventions and methods of engagement.

- *Using low-cost technologies to gather social and market data that enterprises actually use*

**Acumen**, a nonprofit impact investor, prioritizes the collection and use of data that their investees actually value. Its approach, which it calls Lean Data, uses surveys delivered largely by mobile to gather quality data directly from end consumers as cost and time efficiently as possible. This data enables Acumen and its social entrepreneurs to listen at scale to the people whose lives they aim to improve, allowing them to better understand the impact of their work as well as a range of fundamental customer feedback topics. In the last two years Acumen has worked with more than 40 companies inside and outside of their portfolio to implement Lean Data projects to have conversations with more than 25,000 Base of the Pyramid customers. For example, Acumen used mobile interviews to reach the customers of d.light, a global enterprise that sells solar products. The data revealed a range of positive social benefits but also that 36 percent of customers that had experienced an issue with their product did not reach out to the company. The company has since made more proactive steps to reach out to customers.

- *Conducting low-cost randomized control trials (RCTs) to demonstrate program value*

**Family Connects** in Durham, North Carolina (**Durham Connects**) is a community-wide home visiting program that provides nurse visits to parents of newborns in Durham County at no cost to families. The investigators designed a relatively inexpensive RCT to demonstrate the program's value. Durham Connects had sufficient funding to conduct brief evaluation interviews with families when infants were approximately six months old, but not enough funding at the time to evaluate long-term program impacts. The program addressed this limitation by using hospital billing records to conduct a low-cost evaluation of program impacts on mother and child medical emergency care (emergency department visits plus hospital overnight admissions) utilization through child age 24 months. By finding a solution that relied on existing administrative records rather than new data collection, Durham Connects demonstrated evidence of impact while staying within financial constraints.

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- *Using behavioral insights to overcome resistance to evidence-based decision-making*

**Root Solutions**, a nonprofit organization working with environmental leaders, uses behavioral science to bridge the gap between data and decision-making. The organization provides conservationists and policy makers with tools and resources specifically driven by behavioral science principles such as setting the appropriate expected and social modeling and framing, to help organizations tailor energy, water, and habitat data and messaging to promote behavior change and increase the impact of environmental initiatives.

## 2 Learning is embedded and continuous

- *Embedding experimentation to discover the best methods and continuously improve results*

**One Acre Fund (OAF)**, a nonprofit that supports smallholder farmers in East Africa, embeds experimentation in its work by gathering data to test, prototype and refine approaches with new changes in place for each crop season. Every innovation is moved through a rigorous, multi-phase trial process, and if proven successful, is scaled across its farmer network. For example, OAF found that many smallholder farmers want to grow green leafy vegetables like collard, but lacked the seed supply and know-how to plant it correctly. OAF created a collard seed support package that now reaches hundreds of thousands of farmers.

- *Shifting the emphasis from program staff "grading" to learning and adaptation*

**The Open Society Foundations (OSF)**, the international philanthropic network founded by George Soros, are shifting their emphasis to learning and adaptation. The organization separates conversations focused on learning from conversations about strategy approval and funding allocation. Every two years on a rolling basis, it conducts a "portfolio review" of each area of work with program staff and board members to self-critique their activities and assess what has worked and what has not. Program allocation decisions then occur separately as part of a strategy and budget review up to two years later that reflects not just program performance, but also refinements to OSF's approach that emerge from the learning-focused portfolio review.

- *Prioritizing learning in addressing systems-level change*

**Omidyar Network (ON)**, the "philanthropic investment firm" founded by eBay founder Pierre Omidyar, has developed a deliberate, learning-focused model that recognizes the difficulty of proving causality and the non-linear nature of systems-level change. ON explicitly seeks evidence of both direct and sector-level routes to impact, where sector-level impact may include pioneering a new business model, providing industry infrastructure, or influencing policy.

- *Developing and deploying easy-to-use tools to support emergent learning*

**Fourth Quadrant Partners** is a technical assistance provider that employs a set of principles and a suite of tools collectively called "Emergent Learning." Delivered directly and through certified practitioners, emergent learning helps teams build learning and reflection directly into the work itself instead of learning that happens away from work or in a classroom. Emergent learning stresses making thinking visible and turning work into learning calls to action as a means of accelerating results through the use of such tools as Before- and After-Action Reviews and Emergent Learning Tables. Teams use these and other emergent learning methods to plan, test, track results and adapt iteratively, to help them improve their ability to engage in real-time learning in simple, fit-for-purpose ways.

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- *Integrating behavioral science and iterative user-centered design to create solutions*

**HopeLab**, a social innovation lab focused on designing science-based technologies to improve the health and well-being of teens and young adults, makes connections between social processes, human behavior, neuroscience, and the human genome to create effective digital solutions. The organization identifies promising behaviors that support health and well-being, researches the psychology that motivates or inhibits those behaviors, tests potential solutions in rapid feedback cycles using user-centered design principles, and creates technology that engages psychology drivers to change behavior. For example, HopeLab developed the “Mood Meter” app in collaboration with Marc Brackett of the Yale Center for Emotional Intelligence to develop emotional awareness by helping users plot their feelings and providing tools and strategies to help users shift their mood to a more positive state.

- *Promoting cultures of data and learning to drive performance in the social sector*

**Performance Imperative (PI)** is a framework developed collaboratively by the Leap Ambassadors Community, a group of nonprofit leaders, funders, and thought leaders working to advance the mission-critical message that “performance matters.” PI provides a clear definition of “high-performance organizations” for the social sector and lays out the pillars and principles that promote high-performance. The pillars include a culture that values learning, internal monitoring for continuous improvement, and external evaluation for mission effectiveness. For each of the PI’s principles, the Performance Imperative Organizational Self-Assessment (PIOSA) presents one or more specific practices or behaviors that represent manifestations of that principle in action.

- *Learning by doing: using rapid cycle feedback and iteration to improve program design*

**Samaschool**, a program within the nonprofit Samasource, trains low-income job-seekers using a minimum viable product (MVP) design approach to develop its programming and rapid-cycle iteration to improve its work based on participant feedback. Rather than spending time developing the “perfect” training program, the Samaschool team designed an initial program, and then sought feedback from the first cohort of 20 students. Now Samaschool continuously gathers feedback from both students and employers to systematically iterate and refine the curriculum so that each training program can build on the lessons of the previous one.

### 3 There is greater investment in monitoring, evaluation, and learning capacity

- *Providing a long-term training program to build evaluation capacity and encourage evaluative thinking*

**Building Evaluation Capacity (BEC)**, an eighteen-month program co-created by the Hartford Foundation for Public Giving and Anita Baker, E.D., of Evaluation Services, provides nonprofit leadership and staff with comprehensive, long-term training to increase both evaluation capacity and organization-wide use of evaluative thinking. This program is offered to the nonprofit community through the foundation’s Nonprofit Support Program (NSP). Participants are selected from the foundation’s existing grantees and potential grantees. As part of BEC, participants receive training sessions and dedicated guidance through the development and implementation of a rigorous evaluation design for a selected program from each organization. Forty-five organizations have completed BEC since its introduction in 2006, with a new cohort of organizations starting the program every other year.

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- *Building nonprofit evaluation capacities through communities of practice*

**Measure4Change**, an initiative of Urban Institute and the World Bank Group, hosts a community of practice for nonprofit evaluation staff in the Washington, DC area to enable them to learn from one another. The community meets quarterly and the sessions are intended to make performance management more accessible by helping nonprofit leaders learn from their peers. By participating in the community of practice, nonprofit leaders can better understand the range of performance management practices, assess their programs compared to their peers, and explore how they can advance their work. In addition to the community of practice, Measure4Change also offers grant support and one-on-one technical assistance to small cohorts of nonprofits and a series of knowledge briefs bear on strategic management and policy decisions. Among other efforts, the Project trains and places “data fellows” in partner organizations to provide in-house data analytics support, help develop evidence-informed policy, and improve the organization’s ability to leverage strategic analytics.

- *Providing a multi-pronged approach to help nonprofits create data and learning-oriented cultures*

**Edna McConnell Clark (EMCF)’s PropelNext**, an integrated three-year program for selected youth organizations, promotes “results-driven nonprofit cultures” by helping organizations strengthen their capacity to collect, analyze, and apply data for ongoing improvement and learning. The program provides grantees with support from coaches and consultants with program design and performance management expertise, group learning sessions, a peer network and online learning community, and unrestricted funding. A recent assessment found that the combination of each of these elements working together was important to overall performance improvement. The 13 organizations that completed the program in 2015 have expanded their impact, attracted new resources and funding, and built partnerships to further amplify their impact on the lives of disadvantaged youth.

- *Providing “embedded resources” to help organizations develop their evaluative thinking and data capabilities*

**Harvard’s Strategic Data Project**, an initiative of the Center for Education Policy Research at Harvard University, partners with school districts, states, and nonprofits to bring high-quality research methods and data analysis to bear on strategic management and policy decisions. Among other efforts, the Project trains and places “data fellows” in partner organizations to provide in-house data analytics support, help develop evidence-informed policy, and improve the organization’s ability to leverage strategic analytics.

- *Learning with grantees to help nonprofits accurately assess progress*

**The Mary Reynolds Babcock Foundation** focuses on building trust with grantees and developing long-term relationships to help make assessment discussions learning opportunities rather than punitive judgments. The Foundation includes this priority in its internal hiring decisions, choosing network officers who are humble and able to enter into relationships with potential or current grantees as “co-learners”. These network officers focus on organizational development and work with grantees to articulate their goals and outcomes. The Foundation is listed by the Center for Effective Philanthropy as one of the highest-rated funders by nonprofits for helping nonprofits improve their ability to assess their progress.

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## The data and methods needed to inform decisions are available

- *Investing in data and analytics infrastructure to build understanding and guide programming*

**Polaris**, a nonprofit that combats human trafficking, invests in large-scale data collection and analysis to more effectively understand and prevent trafficking. Since December 2007, Polaris has operated the National Human Trafficking Hotline and established the Polaris BeFree textline in March, 2013. Polaris realized that each human trafficking situation reported to these helplines contained untapped data. Polaris invested in meticulously coding and documenting nuanced information about the more than 30,000 suspected incidence of human trafficking which have been reported to the helplines. The organization then analyzed this data and connected it with public sources to create a detailed picture of how trafficking networks operate. That knowledge, in turn, shaped Polaris's prevention efforts, policy work, and even law-enforcement investigations.

- *Using data mining to improve understanding of key ingredients for successful programs*

**Algorhythm**, a technology company dedicated to fostering greater social impact through data-driven decision-making, used analytics and data from 27 youth development organizations, 80 programs, and more than 3,000 youth to understand the various positive youth development practices that drive success for young people in out-of-school programs. Algorhythm found thirteen "positive deviant" programs that significantly outperformed their peers, posting twice the gains on social and emotional learning outcomes than peer organizations. Using this analysis, Algorhythm identified four key areas of practice that drove better performance and identified actions that improve the likelihood of a positive outcome.

- *Creating low-cost tools to make rigorous assessment easier and more affordable*

**Mathematica Policy Research**, a nonpartisan research organization that conducts policy research, data collection, and data analytics, has launched a new software tool, **RCT-YES**, which enables organizations to more easily assess the impact of their programs. RCT-YES, which can be downloaded for free, allows users to enter program inputs and then produces an R or Stata computer program that calculates and presents analysis results in formatted tables and graphs. For example, if a school district randomly sent half of its teachers an email encouraging them to participate in a new technology training course, the RCT-YES software would help non-evaluation experts quickly and cheaply determine answers to questions like "Did the invitation lead to increased usage of the technology?" And, "Did the technology lead to improved outcomes for students?"

- *Creating a highly replicable, data-driven model that enables wide-ranging comparisons*

**Rare**, an international conservation organization, uses a social marketing approach with the motto "find what works and repeat it" to promote environmental behavior change in more than 50 countries. The organization embraces a data-driven culture that includes training local partners to establish baselines and to track knowledge, attitudes, and behavior change. Since the basic social marketing approach is the same whether it's applied, for example, to preventing slash and burn agroforestry techniques or to stopping trash dumping in protected marshland, the organization can track and compare percentage point changes in behavior across a wide range of projects and countries.

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