Monitor Institute
by **Deloitte.**

Bright spots
Better empowering constituents and promoting diversity, equity, and inclusion

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 better empowering constituents and promoting diversity, equity, and inclusion. These are meant to provide inspiration and examples of how innovative practices have actually been implemented.

① Equity is consistently considered in and supported by MEL efforts

- *Integrating equity as a key dimension of community well-being*

  Robert Wood Johnson Foundation is integrating equity goals into its efforts to promote a national "Culture of Health" in the United States, focusing a portion of its work specifically on creating healthier, more equitable communities. To assess community health, the Foundation is using measures that are broader than traditional health measures and include equity indicators, such as housing affordability and residential segregation. The Foundation is tracking these measures across 30 communities, chosen to reflect geographic and demographic diversity, to better understand how communities make progress or encounter barriers in improving members' health and well-being.

- *Developing simplified tools to determine if a program is meeting its equity goals*

  The EquityTool, a free app developed by a collaboration of nonprofits and social sector actors, enables programs to quickly and easily assess whether they are serving the poor in the low- and middle-income countries in which they operate. Metrics for Management maintains and supports the EquityTool, which provides a brief and simple country-specific questionnaires (for 30+ countries) to assess the relative wealth of respondents by asking questions such as, "What kind of fuel does your household mainly use for cooking?" The EquityTool can be run offline on any mobile or tablet device and offers integration with a variety of data collection platforms. When data is uploaded, the EquityTool automatically calculates the wealth distribution of the population served by the program.

- *Using a data-focused approach to measure progress on equity*

  The Community Foundation for Greater Buffalo participates in the Racial Equity Roundtable, a group of 30 community leaders from public, private, nonprofit, and faith institutions, committed to tackling gaps in racial equity in the region through a data-focused approach. The Roundtable identified 16 equity indicators across four areas that span education and job readiness, criminal justice and safety, quality of life and neighborhoods, and income and wealth. The Foundation will use this detailed equity mapping to track equity impacts over time.

- *Building the pipeline of evaluators of color to challenge old assumptions and contribute new perspectives*

  The Annie E. Casey Foundation, through its Leaders in Equitable Evaluation and Diversity (LEEAD) initiative, is strengthening the pipeline of historically underrepresented minority evaluators by priming them to be leaders in evaluation. The program duration is one year and consists of three components: an online-based evaluation coursework; ongoing mentorship from senior experts in evaluation; and a residency at a research organization, think tank, foundation, or private firm. The Foundation partnered with the University of Wisconsin-Stout to provide credit-bearing course modules from their online Evaluation Studies Certificate program.

Source: All bright spot language is from personal communication.

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2   **Constituent feedback is an essential practice**

- *Systematically using constituent feedback to improve and benchmark organizational performance across related organizations*

  Fund for Shared Insight (Shared Insight), a collaborative effort among funders to improve philanthropy, builds capacity among foundations and nonprofits to establish feedback loops and give greater voice to constituents. Through its Listen for Good initiative, Shared Insight is working with 46 nonprofit organizations across diverse fields to implement a largely standardized questionnaire for their constituents based on the Net Promoter System methodology (an approach used in the private sector that can help predict future growth and profitability). The approach allows the organizations to benchmark constituent feedback data against comparable organizations over time.

- *Deploying an app to empower citizens to provide real-time feedback to hold governments accountable*

  DevelopmentCheck, an app for real-time citizen feedback on the transparency, inclusiveness, and effectiveness of development projects, helps local citizens engage directly with service providers and government to ensure local projects are delivered successfully. The app gives citizens a collective, instant, global voice; provides visibility into development projects; and enables community monitors to report on the "Fix-Rate" for problems identified through the app. In general, as fix-rates improve, so too does trust between community, service providers, and governments. The app measures access to information, project effectiveness, and community engagement.

- *Creating better incentives for nonprofits to prioritize constituent feedback*

  GlobalGiving, a global crowdfunding platform for nonprofits, incentivizes the collection of constituent feedback by tying it to perks on the platform that typically lead to increased funding. Through GlobalGiving Rewards, a program similar to a frequent flier program, organizations earn points for engagement (e.g., reporting on their progress) and effectiveness (e.g., listening to their constituents). GlobalGiving uses points accumulated by nonprofits to measure growth and translates that growth into a status (e.g., Emerging, Superstar). The higher an organization's status, the more GlobalGiving drives donations to that organization through its platform.

- *Bridging the information gap between nonprofits and constituents using technology tools*

  VOTO, a social enterprise, uses a mobile phone-based platform to help businesses, governments, and NGOs understand and communicate with the people they serve. VOTO integrates voice, SMS, and analytics into a platform that facilitates mobile-based mass interaction and helps organizations reach individuals who are normally unheard. For example, VOTO helps organizations reach rural women by first testing the best ways to engage women through mobile phones. The organization's robust evidence base can be analyzed to determine whether having a female voice present the survey instead of a male voice helps ensure completion by women.

- *Growing nonprofit capacity to build feedback loops with constituents*

  Feedback Commons (FC), an initiative of Keystone Accountability, provides nonprofits with the tools and resources to close feedback loops with constituents. FC simplifies the workflow often required to administer surveys, enabling nonprofits to focus on designing, collecting, analyzing, and communicating their survey results more effectively, with support from FC resources. The platform also encourages

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nonprofits to opt into a "neighborhood" (i.e., a network of organizations with a common community of practice), merging surveys about human relationships to establish community benchmarks and define good practice.

- *Using former constituents to encourage and elevate present constituent voice*

  User Voice, a nonprofit that aims to improve the services provided by the criminal justice system, is building structures that enable productive collaboration between service users and service providers. User Voice's work is led and delivered by former service users, who have detailed knowledge of the criminal justice system. They are able to gain the trust of current service users, encourage them to participate, and elevate their priorities to those with decision making authority.

- *Using trusted intermediaries to encourage more honest feedback and dialogue*

  The DentaQuest Foundation (DQF), a corporate funder focused on promoting oral health in the United States, is creating safe spaces to encourage grantees to provide candid feedback on DQF's performance. To accomplish this, DQF uses intermediaries to help establish feedback loops that improve the foundation's strategy development and decision making. By using intermediaries to facilitate discussions without foundation representatives present, and by aggregating all information collected, DQF has reduced the disincentive for grantees to be candid and improved the quality of information DQF receives from which to make strategic decisions.

3 **Constituents are empowered to make their own choices**

- *Using data to build trust and tailor resource allocation*

  Family Independence Initiative (FII) is an organization that trusts and invests directly in low-income families across the nation so they can work individually and collectively to achieve prosperity. FII leverages the power of technology and information to allow families to strengthen existing and create new social networks while also providing them access to financial capital to support one another in achieving mobility. FII has integrated constituent feedback into the core of its work, not only to help direct how it deploys dollars to families, but also to empower families to make their own choices about improving their lives. To do this, FII has created a web-based data platform for families to set their own financial goals and connect with other families in the effort to find solutions to the challenges they face, from child care to saving for a home to affording tuition. FII's platform helps families track their own progress, and FII matches their self-determined efforts with financial capital to accelerate attainment of their goals.

- *Giving constituents a voice in guiding the programming for their families*

  The Northside Achievement Zone (NAZ) is a nonprofit collaborative of organizations that exists to close the achievement gap and end multi-generational poverty in North Minneapolis. NAZ empowers parents to voice their perspective to help guide programming that supports a culture of achievement in the community. To strengthen diversity and improve dialogue with parents, NAZ has created a parental advisory board to advise leadership, and has also assigned two seats on its Board of Directors to parents. This structure facilitates a more inclusive dialogue, which allows parental priorities, concerns, and definitions of success to be conveyed directly to leadership throughout the organization, making strategic decisions for the collaborative.

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- *Building community capacity to access data and measure what is valuable to communities*

   The California Endowment's (TCE) Building Healthy Communities initiative, which operates in fourteen communities across California, is building community capacity to measure progress against their own priorities. In TCE's learning and evaluation model, an evaluator is selected by the local site leaders in each community to help develop learning and evaluation plans, facilitate data collection and analysis, and participate in cross-site learning. Based on a set of shared goals and indicators identified in the

- Building Healthy Communities North Star Goals and Indicators, the foundation is now exploring the best way to set up a coordinated measurement database to allow each community to access data and generate reports specific to their interests. This could include evaluating whether healthcare access or rates of chronic absenteeism or expulsion have improved in each community over time.

- *Promoting constituent-guided research to improve the quality and relevance of information available to constituents*

   The Patient-Centered Outcomes Research Institute (PCORI), an independent nonprofit organization that aims to provide data to help patients and their caregivers make better informed health decisions, works to advance the shift in clinical health research from "investigator-driven" to "patient-centered" studies. PCORI involves patients in all aspects of the research process—choosing research and outcomes topics, developing and conducting studies, and sharing the results. For example, patients, clinicians, and researchers share in governance of the network and data use decisions for PCORnet, PCORI's initiative to harness patient data to facilitate more efficient and powerful research studies.

- *Nurturing talent within communities to create local evaluation capacity*

   W.K. Kellogg Foundation has been working to develop local evaluation capacity by fostering the talent of leaders in rural New Mexican communities. The Foundation recognized that comparatively few existing evaluators understood the culture and reflected the diversity of these communities. As part of the effort to develop local talent, the W.K. Kellogg Foundation is supporting an evaluation training program with students at the University of New Mexico.

4   Data rights are secured

- *Providing principles, templates and best practices in digital data use*

   The Digital Civil Society Lab at the Stanford Center on Philanthropy and Civil Society investigates the challenges and opportunities facing civil society organizations in the digital age, and develops resources to help organizations use digital resources safely, ethically and effectively. The Lab runs the **Digital Impact program**, which has developed a suite of tools and resources for civil society organizations to inform data management and governance. Resources include a policy wizard and templates for developing relevant digital policies, digital data inventories and tools, and engagement guidelines.

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- *Enabling constituents to control the use of their data and opt-in to participating in data collection*

  OpenPaths, part of the Health Data Exploration Project funded by the Robert Wood Johnson Foundation and managed by researchers at UC San Diego, provides a "secure data locker" that allows individuals to track and record their geolocation data, independently analyze their own data, and share their data with researchers only if the individuals choose to do so. OpenPaths gives individuals control over their data, while supporting research initiatives (for example, a project that tracked community patterns to understand the spread of the Tiger mosquito) by facilitating the participation of OpenPaths users who consent.

- *Protecting the digital data of vulnerable populations*

  The International Rescue Committee (IRC) provides a **Service Info** tool accessed through a computer or mobile device to allow approximately 1.5 million Syrian refugees in Lebanon find assistance and give feedback on the services relevant to them. Crucially, all feedback goes through a review process and the compiled feedback is disseminated to service providers anonymously (unless providers of feedback choose to make their identities known). The general "feedback report" can only be viewed by service providers to help them learn and improve their performance, not by members of the public as a way to rate program quality. However, members of the public are able to view service providers' responses to feedback when responses are provided, in order to close the feedback loop*.

- *Creating technology safeguards to protect data rights*

  Benetech, a nonprofit that empowers communities through software for social good, transforms how people with disabilities read and learn, makes it safer for human rights defenders to pursue truth and justice, and connects people to the services they need to live and prosper. Benetech advocates for a software and data revolution that delivers positive and lasting social impact at scale. Benetech's data-driven approach, called Data for Action & Impact, uses data to not only help the social sector better respond to today's needs and to improve efficiency, but to also establish that interventions lead to lasting change. As a software nonprofit headquartered in Silicon Valley, Benetech serves as bridge between the social sector and Silicon Valley by working closely with both communities to identify needs and software solutions that can drive positive social change.