

Monitor Institute
by **Deloitte**.

Bright Spot

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

More effectively
putting decision
making at the center

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 it 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 incidences of human trafficking that 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.

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Bright Spot

*Prioritizing learning in
addressing systems-
level change*

More effectively
putting decision
making at the center

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.

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Bright Spot

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

More effectively
putting decision
making at the center

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.

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Bright Spot

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

More effectively
putting decision
making at the center

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 devices 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 and to solicit input on 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, facilitating communication 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 surfaced that 36 percent of customers who 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.

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Bright Spot

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

More effectively
putting decision
making at the center

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 the children's first 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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Bright Spot

*Building nonprofit
evaluation capacities
through communities of
practice*

More effectively
putting decision
making at the center

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.

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Bright Spot

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

More effectively
putting decision
making at the center

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.

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Bright Spot

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

More effectively
putting decision
making at the center

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.

Bright Spot

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

More effectively
putting decision
making at the center

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.

Bright Spot

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

More effectively
putting decision
making at the center

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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Bright Spot

Providing "embedded resources" to help organizations better use data and evaluative thinking

More effectively
putting decision
making at the center

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.

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Bright Spot

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

More effectively
putting decision
making at the center

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.

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Bright Spot

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

More effectively
putting decision
making at the center

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.

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Bright Spot

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

More effectively
putting decision
making at the center

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?"*

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Bright Spot

*Learning with grantees to
help nonprofits accurately
assess progress*

More effectively
putting decision
making at the center

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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Bright Spot

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

More effectively
putting decision
making at the center

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 experiments 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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Bright Spot

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

More effectively
putting decision
making at the center

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 default 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.

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Bright Spot

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

More effectively
putting decision
making at the center

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.

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Bright Spot

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

More effectively
putting decision
making at the center

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.

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Bright Spot

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

More effectively
putting decision
making at the center

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.

Bright Spot

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

Better empowering
constituents and
promoting diversity,
equity, and inclusion

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.

Bright Spot

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

Better empowering constituents and promoting diversity, equity, and inclusion

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.

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Bright Spot

*Creating technology
safeguards to protect data
rights*

Better empowering
constituents and
promoting diversity,
equity, and inclusion

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.

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Bright Spot

*Creating better
incentives for nonprofits
to prioritize learning*

Better empowering
constituents and
promoting diversity,
equity, and inclusion

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.

Monitor Institute
by **Deloitte.**

Bright Spot

*Using data to build trust
and tailor resource
allocation*

Better empowering
constituents and
promoting diversity,
equity, and inclusion

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.

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Bright Spot

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

Better empowering
constituents and
promoting diversity,
equity, and inclusion

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.

Bright Spot

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

Better empowering constituents and promoting diversity, equity, and inclusion

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.

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Bright Spot

*Growing nonprofit
capacity to build
feedback loops with
constituents*

Better empowering
constituents and
promoting diversity,
equity, and inclusion

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 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.

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Bright Spot

Using former constituents to encourage and elevate present constituent voice

Better empowering constituents and promoting diversity, equity, and inclusion

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.

Bright Spot

Using trusted intermediaries to encourage more honest feedback and dialogue

Better empowering constituents and promoting diversity, equity, and inclusion

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.

Bright Spot

Bridging the information gap between nonprofits and constituents using technology tools

Better empowering constituents and promoting diversity, equity, and inclusion

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.

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Bright Spot

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

Better empowering constituents and promoting diversity, equity, and inclusion

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.

Bright Spot

*Creating opportunities
for community
members to be thought
partners in performance
measurement*

Better empowering
constituents and
promoting diversity,
equity, and inclusion

First5LA, a leading early childhood advocate and public grantmaker working collaboratively across L.A. County, is engaging community members more intentionally in performance measurement and learning across fourteen communities. Community members use data to determine key priorities, and First5LA develops RFPs based on those priorities. Community members are then engaged in the grantee selection process as a way to bring them in early and often during the lifecycle of the grant. To receive a grant, organizations must demonstrate how they will collaborate with community members to develop implementation plans, performance measures, and learning structures for continuous quality improvement.

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Bright Spot

*Creating an inclusive
community-focused
process to define
initiative success*

Better empowering
constituents and
promoting diversity,
equity, and inclusion

The Skillman Foundation, a Detroit-based foundation, included the community in defining and tracking success as part of its **Good Neighborhoods Initiative**, a 10-year, \$120-million commitment to six Detroit neighborhoods. The Foundation collaborated with key partners and stakeholders, including neighborhood residents and youth, to create and track the progress of the initiative's goals. Over the course of the decade, the Foundation consistently invested in developing and refining a data and measurement strategy designed to support monitoring, evaluation, and learning as an essential component of the Good Neighborhoods work. The investments in data and metrics resulted in an increase in the capacity of the Foundation and its partners to acquire, use, and understand data for planning, advocacy, monitoring, evaluation, and learning. There are numerous examples of relative modest data investments that led to highly impactful shifts in capacity--such as the police and community use of crime data, blight mapping, and the gathering and sharing of school performance data.

Monitor Institute
by **Deloitte.**

Bright Spot

*Nurturing talent within
communities to create
local evaluation capacity*

Better empowering
constituents and
promoting diversity,
equity, and inclusion

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.

Monitor Institute
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Bright Spot

*Using a data-driven
systems change
approach to advance
racial equity*

Better empowering
constituents and
promoting diversity,
equity, and inclusion

The Community Foundation for Greater Buffalo convened the Racial Equity Roundtable, a group of 30 community leaders from public, private, nonprofit, and faith institutions, committed to closing racial equity opportunity gaps in the region through a data-driven approach. The Roundtable identified 16 racial 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 is using this detailed racial equity mapping to track the population-level impact of systems change efforts over time.

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Bright Spot

*Protecting the digital
data of vulnerable
populations*

Better empowering
constituents and
promoting diversity,
equity, and inclusion

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.

Monitor Institute
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Bright Spot

Enabling citizen-generated data collection to monitor progress

Better empowering constituents and promoting diversity, equity, and inclusion

CIVICUS, a global membership alliance for citizen participation, in partnership with experts in the information and communication technologies for development space, launched the DataShift initiative to help civil society organisations produce and analyze data, especially citizen-generated data, to drive sustainable development. It does this by conducting research, building capacity, supporting campaigns, and improving the monitoring of government, with a view to improving accountability, policies, and services. For example, through its online Learning Zone and in-country training programs, DataShift helps organizations and citizen-generated data projects use the latest data collection and analysis tools to support the delivery of the global Sustainable Development Goals. DataShift has supported Local Interventions Group in Nepal, for instance, to gather data directly from communities to verify governmental resource allocation during post-earthquake recovery.

Bright Spot

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

Better empowering constituents and promoting diversity, equity, and inclusion

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.

Monitor Institute
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Bright Spot

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

Better empowering
constituents and
promoting diversity,
equity, and inclusion

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.

Bright Spot

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

Better empowering constituents and promoting diversity, equity, and inclusion

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.

Bright Spot

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

Better empowering constituents and promoting diversity, equity, and inclusion

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.

Monitor Institute
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Bright Spot

Building a social sector big data platform to share social impact data

More productively
learning at scale

Illumidata, a suite of data services currently under development by the Council of Michigan Foundations in collaboration with data analytics experts, aggregates and analyzes data for social sector actors of all sizes. The platform will provide access and analysis for baseline data that includes more than 500,000 social data sets across issue areas. Organizations can also contribute their own data, protected by a rigorous data rights management policy. Users can then overlay their own program data with related public data and the shared data of other users, leading to greater insight, more meaningful impact assessment, and the identification of gaps and trends.

Monitor Institute
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Bright Spot

*Enabling field-wide
learning by sharing
detailed data with
researchers*

More productively
learning at scale

Crisis Text Line, a nonprofit that provides counseling services to teens via text message, shares detailed, anonymized data with approved researchers. Over 32 million text messages have been exchanged via Crisis Text Line since its launch, making it the U.S.'s largest open set of crisis data. The volume of messages and variety of content enables researchers to investigate trends and explore services and policies that can better support teens facing personal crises. One group of researchers, for example, is investigating how LGBTQ youth in various zip codes talk about their experiences and then is comparing those experiences to local school and government policies.

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Bright Spot

*Creating a location-based
open data platform to
improve transparency and
decision making*

More productively
learning at scale

Connecticut Data Collaborative (CT Data), a cross-sector partnership, compiles data from disparate sources including the state's various departments, integrates and curates the data, and provides open access in order to inform residents, nonprofits, policymakers, and funders. CT Data enables users to access organized, processed data or download raw data for independent analysis. CT Data provides over 135 datasets that can be explored by topic (e.g., education, housing) and Connecticut geographies. By making data accessible, CT Data has informed planning, policy, and decision making. For example, as part of the Racial Profiling Prohibition Project, communities have access to town-level traffic stop data by race.

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Bright Spot

*Creating an open platform
to integrate diverse data
sources and improve
decision making*

More productively
learning at scale

Water Point Data Exchange, a global data platform, enables the access, sharing, and synthesis of data on water availability and distribution. The Water Point Data Exchange (WPDx) uses a collaboratively developed standard to bring together water source datasets being collected by governments, researchers, and nonprofit organizations around the world. Over 300,000 records from nearly 30 countries have been brought together in the WPDx Repository, enabling access to current water data so that all stakeholders can work more effectively.

Bright Spot

*Collaborating with
grantees to create a
shared learning agenda
and collectively prioritize
issue areas*

More productively
learning at scale

The Vancouver Foundation's Fostering Change initiative

created a learning community of its multi-year grantees and collaborated with them to develop a shared "learning agenda." The learning agenda, driven by the grantees' challenges and open questions, enabled the Foundation and its grantees to prioritize issue areas and tackle them together. Managers and frontline staff from each organization met every six weeks as a "shared learning and evaluation" working group. A different grantee hosted each meeting, allowing the grantees to see one another's sites and further enabling peer-to-peer learning.

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Bright Spot

*Using common indicators
to compare progress
across geographies*

More productively
learning at scale

The Community Foundation for Greater Atlanta joined 20 states and four cities in producing an annual Civic Health Index, using common indicators that enable comparison across the participating geographies and through time. When the Community Foundation for Greater Atlanta made the Civic Health Index its primary gauge for progress, it adopted the common indicators already used by the other participating geographies. It collected the same data points for comparison in 2014, and has continued to collect data at regular intervals thereafter. In the interim, the Community Foundation for Greater Atlanta has enhanced its efforts to seek common data within the metropolitan region's 23-counties and has worked with the Atlanta Regional Council's "Metro Voices" project. Consistently using these common indicators, enables the Community Foundation for Greater Atlanta to compare across peer organizations and across time.

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Bright Spot

*Creating grantee cohorts
that learn together with
built-in evaluation support
for the collective*

More productively
learning at scale

The Conrad N. Hilton Foundation, a private funder in Southern California, embeds collective learning in its six strategic initiatives, each of which may involve as many as 50 grantees working toward a shared set of goals. An external partner manages the evaluation and learning for each initiative. Edmund Cain, vice president of grant programs with the foundation, describes the approach: “[The evaluation partner’s] job is not to issue a report card on each grantee’s performance but to track the collective impact...on that particular issue over time.” This strategy not only promotes collaborative learning, but also reduces the burden on grantees to manage their evaluation and learning.

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Bright Spot

*Promoting accountability
and incentivizing
responsiveness through a
public feedback forum*

More productively
learning at scale

Great Nonprofits (GNP), an online platform for crowd-sourced information about nonprofits, is building greater transparency about the work of nonprofits through its centralized, open forum. GNP relies on contributors who have direct experience with the nonprofit (e.g., volunteers, constituents, donors) to provide authentic reviews of their experience, similar to Tripadvisor in the private sector. This crowd-sourced approach allows users interested in a particular nonprofit to gain a more comprehensive understanding of that nonprofit before deciding whether to invest time or money. It also enables nonprofits to learn in real-time while creating strong incentives for nonprofits to be responsive and to improve their user experience.

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Bright Spot

*Championing greater
transparency in
philanthropy by holding up
a mirror to foundations*

More productively
learning at scale

Glasspockets, an initiative of Foundation Center, has created an online platform for foundations to share information in a centralized and easily comparable manner. One of Glasspocket's tools allows foundations to measure their own transparency compared to their peers by assessing their current practice against 25 indicators. Among the transparency indicators included are: performance measurement, feedback from grantees, and the sharing of knowledge being funded or produced. Thus far, 86 foundations have publicly joined the effort by sharing their assessments on the site. The Glasspockets blog, Transparency Talk, regularly updates foundation audiences about emerging and best practices in philanthropic transparency.

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Bright Spot

*Creating a "one-stop
meta-analysis shop" to
help improve collective
knowledge*

More productively
learning at scale

Cochrane, a global network of researchers, professionals, patients, and people interested in health, works to improve evidence-informed health decisions by producing high-quality, systematic health study reviews. Cochrane's network of 37,000 members from more than 130 countries, can serve as a powerful resource for meta-analyses of what works. The systematic reviews provide independent and transparent overviews of the range of research studies on a given health subject to assess the current state of knowledge for that topic.

Monitor Institute
by **Deloitte**.

Bright Spot

*Bringing diverse datasets
together to make invisible
connections visible*

More productively
learning at scale

The Humanitarian Data Exchange (HDX) is an open platform managed by the United Nations Office for the Coordination of Humanitarian Affairs (OCHA) to share data about humanitarian crises. The goal of HDX is to make data easier to find and use for analysis. Over 200 organizations are sharing 4,400 datasets that are being accessed by users in almost every country in the world. For example, HDX includes 84 datasets for the 2015 earthquake in Nepal, covering changes in global food prices, landslide locations, health infrastructure, and population movements. These datasets can be analyzed together to understand recovery efforts in Nepal. Building on the work of HDX, OCHA will establish a new Centre for Humanitarian Data in The Hague in mid-2017 to further increase data use and impact in the humanitarian sector.

Monitor Institute
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Bright Spot

Connecting local place-based initiatives to inform national field building

More productively
learning at scale

National Neighborhood Indicators Partnership (NNIP) combines local expertise with the power of a national peer-learning network to strengthen communities. NNIP is made up of independent data intermediaries in 30 cities that have a shared mission to help community stakeholders use neighborhood-level data for better decision making, with a focus on assisting organizations and residents in underserved communities. NNIP is supported and coordinated by the Urban Institute, a nonpartisan research organization. One of Urban Institute's roles is to lead cross-site initiatives across local partners, enabling them to share their successes and challenges, and then to synthesize lessons from their work to inform other localities, as well as national policy. The Partnership recently launched "Turning the Corner," for example, a pilot project in Detroit, Minneapolis-St. Paul, and other cities to develop protocols and methodologies for monitoring neighborhood revitalization that can then be adapted by other cities and used to advance the field.

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Bright Spot

Harnessing the energy and power of a global network to spread and adapt common standards

More productively
learning at scale

The Conservation Measures Partnership (CMP), a global partnership of leading conservation organizations, agencies, and funders, seeks to make conservation efforts more effective and efficient. CMP has a common process and language to better design, manage, monitor, and learn from conservation actions. This adaptive management process and an associated common classification system have been used by thousands of projects and programs to describe and plan conservation efforts and to lay a foundation for teams implementing similar actions to learn from one another. Key products include the Open Standards for the Practice of Conservation, the IUCN-CMP threats and actions classifications, and Miradi adaptive management software. CMP partners with the Conservation Coaches Network, a global network of conservation professionals that support teams on the ground, helping them build their capacity to learn from and continuously improve their conservation efforts.

Source: Personal Communication.

Bright Spot

*Using a shared
measurement system to
see the progress of both
the field and individual
organizations*

More productively
learning at scale

Grounded Solution's HomeKeeper

program standardizes the way affordable housing programs across their sector track data, measure outcomes, and implement effective practices. Over 70 member organizations pay an annual fee to use HomeKeeper, a cloud-based app. Built by and for practitioners, HomeKeeper helps programs manage their day to day program activities, while tracking a core set of fields to produce a common social impact report. HomeKeeper organizations seamlessly share social impact data with the HomeKeeper National Data Hub where information is aggregated and shared across the sector. HomeKeeper's shared measurement system creates an understanding of how the field as a whole is meeting the needs of underserved buyers, but also allows members to benchmark their data to their peers.

Bright Spot

Using prospective registries to promote transparency and avoid the dangers of "publication bias"

More productively
learning at scale

AllTrials, an international initiative led in the U.S. by Sense About Science USA, Dartmouth's Geisel School of Medicine and the Dartmouth Institute for Health Policy & Clinical Practice, calls for all past and present clinical trials to be registered with an agreement to fully disclose study methods and results. The objective is to reduce the tendency of organizations to publicly share only positive results, which skews the field's understanding of what works and what doesn't. One example of the dangers of this "publication bias" was discovered with an anti-arrhythmic medication lorcinide. Numerous people died because original studies pointing to problems weren't published, resulting in other manufacturers developing similar drugs.

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by **Deloitte.**

Bright Spot

*Promoting replication to
confirm the robustness of
impact evaluation evidence*

More productively
learning at scale

3ie, an international development grantmaking NGO, established its replication program in 2012 to improve the quality and reliability of impact evaluation evidence. It incentivizes the replication of influential, innovative, and controversial evaluations of development interventions. 3ie supports efforts to use existing data to reproduce and test the strength of published results. Independent replication lends increased credibility to impact evaluation evidence, whether the studies confirm the robustness of the original findings or provide additional insights suggesting alternative pathways. 3ie oversees the multi-stage replication paper review process, publishes the resulting papers, and acts as a thought leader for research transparency.

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by **Deloitte**.

Bright Spot

*Mapping evidence gaps to
help identify strategic
research priorities*

More productively
learning at scale

3ie, an international development grantmaking NGO, develops evidence gap maps (EGMs) to facilitate evidence informed decision making about program and research investments. EGMs are collections of information on the effects of development policies and programs in a particular sector or thematic area, such as education, water, sanitation, hygiene, and adolescent health. They provide a graphical display of existing and ongoing systematic reviews and impact evaluations in a sector or sub-sector, structured around a framework of interventions and outcomes. 3ie maps are available on an interactive online platform, which allows users to explore the evidence base and findings of relevant studies. By identifying what we know and do not know about “what works”, the EGMs can be used to inform strategic priorities. For example, 3ie found that in the land use and forestry sector, few studies assess if forest protection activities result in trade-offs between food security and climate change mitigation, suggesting new studies are needed to address this gap.

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Bright Spot

*Synthesizing existing
evaluative evidence to
inform strategy*

More productively
learning at scale

Foundation Center's IssueLab

collaborated with a foundation on a synthesis review of key success factors required to achieve social, economic, and ecological benefits for small-scale coastal fisheries in developing countries. The synthesis review aggregated existing data from more than 150 reports to identify 20 key factors believed to influence success in small-scale fisheries. For each factor, the review lists what is known in the literature, identifies different stakeholder priorities, and provides critical questions for funders and implementing organizations. The final synthesis, an interactive visualization of key findings, and a digital collection of the reports used in the synthesis, were all openly licensed and made freely available through IssueLab. The foundation then used the findings to guide the development of a new initiative strategy.

Bright Spot

*Developing a repository
that makes open access to
social sector knowledge an
easy and default practice*

More productively
learning at scale

Foundation Center's IssueLab is an open repository that provides free access to more than 20,000 social sector knowledge products such as case studies, evaluations, and white papers. Operating on the principle that "knowledge is a public good" that should be freely accessible to all, IssueLab encourages and enables the open publishing of field-based knowledge as default practice in foundations and nonprofits. It also works with organizations to develop and curate topical collections that build on—and in turn, contribute to—the larger IssueLab platform when materials are added.

Monitor Institute
by **Deloitte**.

Bright Spot

*Creating a data network to
enable scaled insights*

More productively
learning at scale

Proving Ground, an initiative at Harvard University's Center for Education Policy Research, aims to make gathering evidence of program effectiveness cheaper, faster, and easier for education agencies. Although education agencies have the data needed to measure program impact, including student and staff administrative data, few have been able to use that data for continuous educational improvement. Proving Ground works with a network of districts and charter management organizations to provide an evaluation infrastructure that allows for rapid-cycle implementation and impact analyses for programs being used across the network.

Monitor Institute
by **Deloitte**.

Bright Spot

*Using big data to monitor
global trends*

More productively
learning at scale

HPE Earth Insights, an initiative from Conservation International and Hewlett Packard Enterprise, provides nearly real-time analytics about species in tropical rainforests at 16 sites across 14 countries. Earth Insights manages a consistent stream of camera trap and climate measurement data collected through the Tropical Ecology Assessment and Monitoring (TEAM) Network, a coalition of Conservation International, the Smithsonian Institution, and the Wildlife Conservation Society.

Through the Wildlife Picture Index, HPE Earth Insights has allowed researchers to track declines in diversity within and across sites to understand the effects of climate and land use change on biodiversity and how different conservation strategies work. The rapid data analysis, which previously required manual handling, has allowed conservationists to proactively respond to changes as they emerge.

Monitor Institute
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Bright Spot

*Aggregating
clearinghouses across
multiple issue areas*

More productively
learning at scale

The Pew-MacArthur Results First Initiative created the Results First Clearinghouse Database, a one-stop online resource that provides information on the effectiveness of various interventions as rated by eight national research clearinghouses. The clearinghouses included in the Database conduct systematic research reviews to identify what works in areas including youth development, criminal justice, and education. To address the challenges posed by the existence of multiple clearinghouses, the Database compiles the information in one place, reconciles the different clearinghouse rating systems, and provides the data in a clear, accessible format.

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Bright Spot

Instructions

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.
- **If the challenge clearly falls under one of the Three Characteristics, use only those cards.** Otherwise, you can use them all.
- **Deal out the 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 bright spot described and consider: Is this relevant to your challenge? How is it similar to your challenge?
- **Choose the cards with the bright spots that are most interesting to you.** How could you adapt the solution to your challenge? Does it spark other ideas?
- **"Play" the cards at the center of the table.** Explain the bright spots 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 bright spot.** 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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