

Calls to action

More effectively putting decision-making at the center

Through our research, innovation lab and multiple convenings, we've gathered promising calls to action to inspire innovation. These calls to action include actions that individual organizations can undertake, as well as calls to action for collections of organizations. They are hypotheses about what can spur decision-making at the center, and they are meant to provoke further ideas, adaptations, and refinements.

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

Putting decision-making at the center means first and foremost that front-line decision-makers serving constituents directly have the information they need for effective decision-making beyond a focus on accountability reporting. These calls to action explore possible calls to action to reach that goal:



Innovating new ways of creating and sharing monitoring results: Grant reports are typically a great deal of work for grantees, yet are too often left unread and are seldom used in significant ways by foundations for ongoing decision-making. What could it look like if grant reporting was fundamentally rethought? What if a funder worked with grantees (individually or in related clusters) to use data that is meaningful for the grantees first and foremost, or data that is already collected by the grantees, but would suffice for compliance and monitoring purposes for the foundation?



Differentiating the roles of funders and nonprofits in developing evidence: Nonprofits do not generally have the resources, skills, or incentives to rigorously evaluate impact. What if a foundation or group of foundations took responsibility for testing the quality of broad ideas (e.g. does microfinance work) and nonprofits were only responsible for assessing the quality of their implementation (e.g. monitoring)?¹⁷

2 Learning is embedded and continuous

To get to a better future where foundation and nonprofit cultures better promote ongoing learning for improvement, possible approaches include a focus on barriers, incentives, and promoting innovation:



Applying behavioral design principles to help organizations better understand the barriers to organizational learning: Many foundations and nonprofits aspire to be "learning organizations," but struggle with how in practical terms to embed organizational learning into their culture and operations. Can we adapt materials in the rapidly emerging behavioral design space to create a diagnostic and tools to help funders and/or nonprofits understand where and why measurement processes break down and better implement organizational learning?



Incentivizing iterative, rapid-cycle and adaptive learning: The fear of sharing negative information can stifle innovation and growth. Can a group of funders systematically experiment with multiple approaches that reward grantees for identifying problems and solutions rather than the results themselves?



Lifting up learning as a core pillar: Given that establishing learning cultures in the social sector continues to be a challenge, what if funders explored how to promote "decision-based evidence making"? What if a group of funders held a challenge or offered incentives for organizations that developed innovations in testing hypotheses and experimenting to promote action-oriented learning?



Developing ratings and benchmarking of philanthropies on their setting of strategic goals and their learning: Using established learning organization best practices, can we develop ways to assess how well organizations are integrating strategic learning into their practices to drive improvement and accountability?

Calls to action

More effectively putting decision-making at the center

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

Beyond simply increasing resources spent on individual capacity-building, we have heard ideas to promote realistic expectations for leadership and efforts to promote creative ways to serve the field more broadly:



Training board members to set more realistic expectations for evaluation: Board members play a crucial role in determining the priorities of their organizations, yet they often have little knowledge about the challenges and limitations for assessing impact. Can we create board training materials that both inform board members of what to look for and set realistic expectations for evidence development?



Developing a “minute-clinic”-like mass MEL offering: With a focus on right-sized and cost-effective approaches, can evaluators move beyond an individualized approach to provide mass customization serving large numbers of nonprofits as needed? Could a funder pilot an offering that promoted widely available, “good enough” services?



Promoting rotating resources: What if funders supported evaluation “circuit riders” who could cost-effectively rotate through a number of nonprofit organizations to act as coaches in evaluative thinking and the use of available organizational and issue area evidence?

4 The data and methods needed to inform decisions are available

To get to a better future with higher quality and more sufficient data, we need to think beyond incremental improvements. The following are calls to action that could be tried to jump-start wider analytics and technology use in the sector:



Creating integrated data and social science approach(es) for evidence development: The role of data scientists in the social sector is likely to grow substantially over time, yet data scientists and social scientists have very different training, knowledge, and assumptions. What if data scientists and social scientists were brought together in a systematic effort to define an integrated approach to roles and evidence creation in the social sector?



Creating embedded technology capacity to develop widely needed tools: Insufficient and low-quality data is pervasive in the social sector. Technology tools and infrastructure development could help simplify MEL tasks for organizations, and cross-functional teams could help build internal capacity. What if a funder or funders promoted a “Code for America”-like model with MEL and data analytics teams for a year of service to develop digital tools? The team could be embedded in a single foundation, but could would work on organizational-level tools and technologies that would be relevant across an issue area.



Conducting R&D on promising technologies: There is some debate about the efficacy and biases of new technologies and techniques for the social sector, such as predictive analytics and machine learning. What if a funder supported an R&D initiative to test the applicability and usefulness of data analytics approaches (i.e. how accurate and effective were they, given concerns about underlying data)?

Calls to action

Better empowering constituents and promoting diversity, equity, and inclusion

To get to a better future in which equity is integral to monitoring, evaluation, and learning, and we consistently engage constituents in ongoing and systematic feedback that provides choice and agency, we need to actively chart a new path. The following are some high-priority hypotheses about how to get to the better future.

1 Equity is consistently considered in and supported by MEL efforts

Without explicit efforts to integrate equity into everything we do, we are unlikely to make the transformative changes that our field leaders and experts across multiple disciplines identified as part of a better future. For monitoring, evaluation and learning efforts, we've heard multiple ideas to try:



Developing asset-based resources: Many actors use data with a deficit-frame, focusing entirely on challenges communities face rather than also including strengths and resources they have to draw upon. By focusing solely on deficits, funders can often overlook real assets that can be used to help solve critical community challenges. What if we developed best practice resources and a toolkit for asset-based monitoring, evaluation, and learning, including for the creation of relevant data?



Developing standards for cultural competence and equity-focused evaluation: While the AEA has guiding principles for cultural competence, there aren't clear standards for evaluators to demonstrate evidence of cultural competence during the selection process. What could it look like if clear evidence of proficiency were a standard part of evaluator selection? Could a third party develop a cultural competence examination and issue certification to evaluators?

2 Constituent feedback is an essential practice

How can we get to a better future where collecting constituent feedback is an expected, systematic, and ongoing practice for nonprofits and foundations? The following calls to action are just the beginning in broadening and deepening practice:



Creating tools to help organizations systematically collect feedback: There is some momentum to empower constituent feedback but the practice of collecting constituent insight still appears to be elusive to many organizations. Could a group of organizations create a "constituent insight toolkit" that provides a quick overview of the range of available options and resources to enable quick and easy implementation?



Measuring and tracking the integration of constituent insight to help hold organizations accountable for its use: Could the field develop a way of measuring the incorporation of constituent voice to enable donors to make funding decisions based on the use of constituent voice and to enable organizations to benchmark against themselves and others for improvement? Could a group of organizations in an issue area agree to prioritize these benchmarks in funding decisions, with assistance for implementation?

Calls to action

Better empowering constituents and promoting diversity, equity, and inclusion

3 Constituents are empowered to make their own choices

To get to a better future in which constituents have agency in defining their needs and assessing the success of interventions, there are a range of approaches we could try:



Providing the infrastructure for constituent decision-making: Some resource allocation and other initiative decisions could be made by constituents themselves if the infrastructure existed to enable them to provide their votes. What if funders supported an initiative to model what real constituent-informed decision-making would look like and how it would operate?



Connecting constituents with each other: Constituents can be an important source of information and assistance for each other. What if one or more organizations scale platforms and/or develop resource guidelines to enable organizations to promote sharing and connection between constituents?



Identifying interventions where cash transfers are a meaningful counterfactual: What if we developed an analysis of issues and types of interventions where cash transfers could be a viable counterfactual, to promote calls to action to determine if specific interventions outperformed cash transfers? This would both shift the paradigm to one that presumes constituent agency and knowledge and create a useful experimental comparison.

4 Data rights are secured

Without assurance that we can adequately safeguard the privacy and security of constituents' data, we won't make true progress across many of the elements of the characteristics of a better future. We can try multiple paths to make real progress:



Using data stewards: There are particular concerns about the development of open and integrated data systems with the data of vulnerable populations. Could funders support the establishment of data stewards for key data systems who would make informed decisions to ensure the integrity of the data use?



Developing common tools and technologies: Nonprofits often don't have the resources to adequately ensure that their constituent and other data is safe and protected. What if one or more funders supported the development of a shared software for nonprofits to install add-ons for privacy, security, etc., or the development of shared digital services?



Compensating constituents for their data: Constituents are not directly compensated when their data is used. Are there certain data, issues, or populations where compensating constituents would be productive? What if funders compensated constituents for their data financially or through other means, or otherwise treated it as a real asset belonging to the constituents?

Calls to action

More productively learning at scale

To get to a better future in which we are able to overcome knowledge and data silos to more productively learn at scale, we need to go beyond what we're doing today to embrace much more coordinated and integrated monitoring, evaluation, and learning. However, it is important to note that most activity will likely be at the level of issue areas rather than the social sector as a whole. The following are some high-priority hypotheses about how to get to the better future for learning at scale.

1 Data, learning, and knowledge are shared openly and widely

How can we share what we're learning, good and bad, at a much greater level than we do today? Beyond the open knowledge and data policies discussed in the earlier section, there are multiple calls to action that funders can try:



Overcoming disincentives to share among nonprofits: Nonprofit programs are typically evaluated individually. What if a funder or group of funders provided incentives to a group of grantees working in the same issue area with different theories of change to support aggregated learning and evaluation across multiple organizations?



Expanding the scope of "what works" directories: One concern about "what works" directories is the focus on wide applicability of program-level evidence. What if a directory or directories experimented with compiling evidence using more selection criteria than experimental rigor: looking at the likelihood of effectiveness in different settings and populations, with variation in implementation approaches; and/or at community and systems-levels? ²⁸



Building trust among intermediaries through anonymization: One disincentive to share data is that foundations and nonprofits do not want to be publically penalized for adverse results. What if several nonprofits in an issue area submit their data and results to a trusted intermediary, who then anonymized and aggregated the data? Or if a foundation incentivized nonprofits to contribute?

2 Knowledge gaps and learning agendas are collaboratively undertaken

To get to a better future where we work more collaboratively with other organizations in understanding and developing learning agendas in our issue areas, the development of evidence maps and synthetic literature reviews we brought up. We also heard other creative ideas that could be tried:



Creating a diagnostic for helping groups learn together: Some issue areas are much further along in terms of shared learnings, data collaboration, and collective knowledge development than others. What if a funder supported the creation of a diagnostic that detailed and assessed the conditions that need to exist and key choices for collective learning for an issue area?



Promoting issue-level, action-oriented learning: What would it look like if more foundations operated as "learning foundations," orienting grantmaking to help answer key questions needed by other decision-makers in the issue area? What if one or several existing funders experimented with using a part of their portfolio to focus specifically on funding to answer key learning questions to spread the practice? What if organizations who work with those setting up new foundations helped explore this approach?

Calls to action

More productively learning at scale

3 Data is integrated at scale needed to assess social impact

Open, shared and integrated data are watchwords in thinking creatively about what to try to increase the scale and speed at which we learn:



Enabling better sharing of data through integrated data sets: Governmental administrative data often contains important data related to social interventions, yet it is often either not available to social sector organizations or not configured to answer outcome-related questions. What if a group of funders working on a particular issue mapped and developed the ecosystem for the use of administrative data sets to understand intervention outcomes?



Promoting open source and data extraction: There are basic technical challenges involved in sharing data in the social sector given the number of proprietary systems and the structure of existing systems that limit data extraction. This can be relevant for sharing across organizations and within them. What a funder of funders supported the development of tools to enable data extraction and sharing from key systems for a given issue area?



Promoting common data hubs: Connecting program management software to a common data hub for a given issue area can enable benchmarking and aggregated information. What if a set of funders and grantees worked to assess the necessary conditions for developing this or related models for specific issue areas and then put their learnings into action?

4 Evaluation synthesis, replication, and meta-evaluation are supported

To get to a better future with higher-quality information in the social sector, the following calls to action may help us better learn across individual studies, data sets, and methodologies:



Testing different large-scale approaches: There are presently different hypotheses about how best to learn about variability in what works in an issue area, including multi-site evaluation approaches and data analytics approaches (e.g. machine learning). What if a funder chose an issue area and compared learnings using both approaches?



Dedicating resources to synthesize existing literature: There is extensive existing research in the field, but much of it is unavailable in a digestible way. For a given issue area, what if a funder or collection of funders shared data/studies and support issue curators/translators to synthesize existing research to create a series of comprehensive issue area reviews?



Enabling safe independent verification of the information of others: It can be a challenge to balance data openness with privacy and usage. For a particular issue area, what if a third party intermediary served as a responsible gatekeeper to increase accessibility to and safeguards for key social impact datasets?

About Deloitte

Deloitte refers to one or more of Deloitte Touche Tohmatsu Limited, a UK private company limited by guarantee ("DTTL"), its network of member firms, and their related entities. DTTL and each of its member firms are legally separate and independent entities. DTTL (also referred to as "Deloitte Global") does not provide services to clients. In the United States, Deloitte refers to one or more of the US member firms of DTTL, their related entities that operate using the "Deloitte" name in the United States and their respective affiliates. Certain services may not be available to attest clients under the rules and regulations of public accounting. Please see www.deloitte.com/about to learn more about our global network of member firms.