Expected and better futures

Playing out these different trends, both individually and in combination, allows us to begin to anticipate what the future might look like for monitoring, evaluation, and learning. As we talked with field leaders and experts across multiple disciplines, two very different outlooks became apparent for monitoring, evaluation, and learning:

• There was a clear expected future—the default view of what most people anticipate if they simply project forward current trends and behaviors, without any interventions

• But people also saw a more promising, better future that they hope the field can realize, which will require organizations to change current behavior and make targeted interventions in the larger system

It is important to note that these futures are not intended to be predictions, and complete agreement isn’t necessary for every particular aspect within them. Instead, the concept of the expected and better futures provides a way to enter into a productive conversation about what our hopes are for monitoring, evaluation, and learning; where we’d like to be; and what concrete steps we believe are needed to increase the chances of achieving a better future, rather than the expected one.
An expected future

Across multiple convenings and conversations, we heard consistent themes about an expected future for monitoring, evaluation, and learning in the social sector. There was widespread concern that key barriers to putting decision-making at the center; empowering constituents and promoting diversity, equity, and inclusion; and learning at scale would remain unresolved. Specific concerns include:

1. Grantees have a high reporting burden
2. "Learning organization" remains elusive
3. There is limited capacity
4. There is a lack of sufficient and high-quality data

1. Diversity, equity, and inclusion progress is incremental
2. Constituent voice is seen as optional
3. Funder priorities, not constituent priorities, retain primacy
4. There are struggles to address data ethics

1. There is insufficient transparency and sharing
2. There is limited coordination of learning and evidence creation
3. There are constrained advances in developing shared standards and systems
4. There is difficulty leveraging big data for tangible use

While many experts believe that an expected future will involve incremental progress, the most prominent sentiment we heard around an expected future was one of doubt that we would make substantial advances towards embracing the Three Characteristics of a better future.

Despite common aspirations in these areas, it was clear that obstacles to transformative progress remain. Specifically, the need to invest in the capacity of grantees, prioritize constituent needs, and create incentives to embrace sharing and experimentation were identified as high priority obstacles that need to be overcome.
A better future

In a better future, people imagined that the Three Characteristics would become defining pillars of monitoring, evaluation, and learning in the social sector, and felt the field would embrace key elements of each characteristic.

A better future

More effectively putting decision-making at the center

1. Information for on-the-ground decision-making is prioritized
2. Learning is embedded and continuous
3. There is greater investment in monitoring, evaluation, and learning capacity
4. The data and methods needed to inform decisions are available

Better empowering constituents and promoting DEI

1. Equity is consistently considered in and supported by monitoring, evaluation, and learning efforts
2. Constituent feedback is an essential practice
3. Constituents are empowered to make their own choices
4. Data rights are secured

More productively learning at scale

1. Data, learning, and knowledge are shared openly and widely
2. Knowledge gaps and learning agendas are collaboratively undertaken
3. Data is integrated at scale needed to assess social impact
4. Evaluation synthesis, replication, and meta-evaluation are supported

In a better future, people imagined that the Three Characteristics would become institutionalized at the core of monitoring, evaluation, and learning. While there remains healthy debate on certain topics—for example, the extent to which we should pursue common metrics and shared systems—we heard considerable consensus around what the key elements of a better future would look like.

The elements listed for each characteristic capture the areas of broad agreement. For example, there was widespread support that "continuous learning and improvement" should be the adopted philosophy within the field. We also heard that shorter cycles of strategic planning, implementation, and measurement would promote more learning opportunities for foundation and grantee staff, which could improve subsequent cycles of decision-making. There was also widespread agreement that the collection of constituent feedback should become essential practice, with a strong underlying focus on equity.

In the next section, we define these key elements of a better future in greater detail.

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