WALKING IN THEIR SHOES

FOR A LOW-INCOME mother with three kids struggling at school, the standard philanthropic solution would likely be some sort of educational intervention. But when a mother working with Family Independence Initiative (FII) was asked what *she* felt was needed, her response was striking. One of her children had asthma, and when that child had an asthma attack, she couldn't take the other kids to school on the bus. As a result, all of her children missed multiple days of school. What was needed wasn't educational assistance: She needed a car.

This story has a happy ending: The mother bought a vehicle after negotiating favorable financing terms, and her kids' school attendance and grades improved.[1] But the episode underlines the importance of social-sector organizations walking in the shoes of those they seek to help to provide what recipients actually need and value.

It seems self-evident. After all, seeking to deeply understand the customer's perspective has long been standard in the private sector, and is the foundation of design thinking. Yet the Monitor Institute by Deloitte found that information collected by many social-sector organizations is often not widely shared with constituents or used to directly benefit them.[2] One reason may be because existing incentive structures reinforce the philanthropic funder's ownership and control of data. Add this to the still-prevalent implicit assumption that "the funder knows best," and you have a power dynamic that can perpetuate inequities.

Fortunately, from FII and similar bright spots in practice, the social sector can draw lessons about how to approach monitoring, evaluation, and learning in a way that promotes equity and helps organizations take their constituents' perspectives into account:

- **Gather data about strengths, not just weaknesses.** FII's core philosophy is that the families it works with come from a place of strength. As a result, FII doesn't simply collect information about traditional assets and deficits, which, for low-income families, tends to emphasize needs. The organization *also* asks families to account for social and cultural resources that might otherwise be overlooked by traditional funders, such as informal child care arrangements and lending circles.
- **Develop ongoing processes for integrating lessons learned from constituents into program design and development.** Core operational decisions at FII—such as the decision to develop its technology platform in-house to safeguard family data rather than use a commercial platform—were driven by the families themselves.
- **Enable constituents to learn together.** FII reflects data back to families so that they can learn from their own data over time, as well as from trends among other families across the nation. The organization also enables peer-to-peer learning by connecting families with one another to share the challenges they have faced and the solutions they have discovered in the pursuit of their financial goals.

For more on the social sector's innovations in monitoring, evaluation, and learning, see *Reimagining measurement* on deloitte.com/insights.

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1. This case study, as well as all statements about FII, are based on observations of and conversations with FII personnel undertaken as part of Monitor Institute by Deloitte's "Reimagining measurement" initiative, a yearlong research project exploring social sector evaluation, monitoring, and learning practices.

2. Findings from the "Reimagining measurement" initiative.

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