In Defense of Data: A Funder’s Journey to Support Continuous Improvement

June 21, 2018
VISION: A NEW NORMAL

Project Evident is working towards a better ecosystem to accelerate and increase the supply of outcomes producing programs for communities who need them.

We put practitioners and their beneficiaries at the center of evidence building. Practitioners should be the engine of the evidence train – not the caboose, as they are now – and drive continuous evidence generation to improve community outcomes.

We connect this work to sustainable support from informed funders and policymakers to build capacity for data use, rapid cycle evaluations, and evidence dissemination as ongoing, standard practices in nonprofits.
GOAL: AN ALIGNED ECOSYSTEM

We believe that evidence-building led by practitioners and supported by funders can lead to a healthy evidence ecosystem, with aligned incentives for outcomes.

<table>
<thead>
<tr>
<th>ROLE</th>
<th>RESPONSIBILITY</th>
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<tbody>
<tr>
<td>PRACTITIONERS</td>
<td>Set and drive the agenda for evidence building that helps improve program practices and outcomes for the benefit of communities</td>
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<tr>
<td>FUNDERS</td>
<td>Invest in building nonprofit capacity for continuous evidence generation and program improvement to maximize outcomes, including investments in tools and talent capacity</td>
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<tr>
<td>POLICYMAKERS</td>
<td>Incentivize building and use of evidence through outcomes-based procurement and removal of barriers to data access</td>
</tr>
<tr>
<td>RESEARCHERS</td>
<td>Collaborate on timely and methodologically diverse evaluations that produce practical lessons for program improvement</td>
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APPROACH: SHARED SERVICES

We are pooling talent and tools in a shared services format, and have assembled an interdisciplinary team with skills and expertise in many domains.
Service and Product Offerings
OFFERINGS FOR PRACTITIONERS

Strategic Evidence Planning
Standardized multi-year roadmaps to guide investments and activities for continuous evidence generation and program improvement

Talent Solutions
Outsourced or shared expert talent in data science, analysis, implementation, policy and evaluation
Grand Rounds / Fellows Program
Partnerships

Tools Pilots
- Amazon Web Services
- Excel
- R
- Tableau

Technical Assistance

Policy + Procurement
Evidence-based policy and advocacy strategy
Messaging and communications strategy
Outcomes-based contracting activities

Data + Technology
Data and technology infrastructure
Data and tools training for analytics
Customized tools solutions
low-cost tools for self-guided tests
SEP implementation support

Evaluation
Theory of change
Learning agenda and hypothesis generation
Evidence vision and goals
Continuous improvement
Culture of learning and evidence
Capacity assessments
SEP readiness assessments
The SEP is a staged process that results in a multi-year roadmap to guide investments and activities for continuous evidence generation and program improvement.

<table>
<thead>
<tr>
<th>Exploration</th>
<th>Goal Identification</th>
<th>Capacity &amp; Context Review</th>
<th>Plan Development</th>
<th>Post-Plan Support</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assess need and readiness for SEP or other services</td>
<td>Review background documents</td>
<td>Theory of change review</td>
<td>Develop recommendations</td>
<td>Support navigating plan funding</td>
</tr>
<tr>
<td>Define scope of work for SEP</td>
<td>Develop vision and goals</td>
<td><strong>Assess external context:</strong> evidence landscape; policy landscape; funder and buyer priorities</td>
<td>Develop budget</td>
<td>Consulting on implementation</td>
</tr>
<tr>
<td>Identify staff for SEP coalition</td>
<td>Align staff and management on vision and goals</td>
<td><strong>Assess internal capacity:</strong> staffing; data availability; technology and systems; organizational culture</td>
<td>Align staff and management on recommendations</td>
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<td></td>
<td></td>
<td>Consult external experts and NEAB</td>
<td>Consult external experts and NEAB for quality assurance and implementation feasibility</td>
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<td></td>
<td></td>
<td>Refine goals as needed</td>
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The SEP is a staged process that results in a multi-year roadmap to guide investments and activities for continuous evidence generation and program improvement.
OFFERINGS FOR FUNDERS

We are also developing services for funders in 2018 that are designed to create better alignment between the sectors and are informed by discussions with philanthropic leaders.

Review of grant-making guidelines
Guidance to build capacity for evaluations
Review of investee evaluation plans and outcomes for grant-making, impact investing and pay-for-performance
Support in developing theories of investment and outcomes frameworks, and translating those into practice
Virtual or in-person learning events
Outsourced evaluation function for foundation staff
Planning and technical assistance for grantees and foundation staff

Philanthropy should create space with learning – learn as we grow – keep improvement as north star and hold people accountable to that, create tools and financing for that - buy patience for that to happen.

Many funders don’t understand what it takes to do a strong evaluation in an efficient way that will enhance sustainability instead of burn it to the ground. [Building] capacity has to start with funding.

Voices of philanthropic leaders in conversations with Project Evident
CEO’S LEARNING AGENDA

CEO’s Learning Agenda is grounded in its theory of change, its evidence base, and its commitment to improving outcomes for participants.

How does CEO clarify key program elements that contribute to the program’s recidivism effects, specifically transitional jobs?

How does CEO meet differential needs among participants, across age, risk level, and employment history, to consistently replicate outcomes across locations?

How does CEO improve long-term employment outcomes for participants?
The vision of CEO’s SEP is to fully facilitate and foster a culture of adaptive learning to show meaningful, positive program impacts.

**CEO’S SEP VISION AND GOALS**

- **GOAL 1**
  - **CULTURE & TALENT**
  - Build staff capacity and practices for ongoing dialogue, reflection and learning activities with data to support evidence generation among staff

- **GOAL 2**
  - **DATA USE & TOOLS**
  - Optimize the use of tools for data collection, analysis, and visualization to extract insights for program improvement

- **GOAL 3**
  - **EVIDENCE PRACTICE**
  - Implement new practices to rigorously test program assumptions and innovations to explore their effectiveness
  - Use evidence generated to refine Theory of Change
**LOOKING FORWARD**

**Next-Generation Tools Repository**
Developing a prototype for a user-centered repository of evidence building tools and custom-curated guidance.

**Shared Talent Solutions and Services**
Preparing to provide nonprofits with fractional talent solutions for technical advising and assistance to build evidence.

**Advancing SEP Implementation**
We are continuing to test and learn about cheaper, easier to use tools options for nonprofits to implement their evidence plans.

**Funder Education**
Developing guidance and learning opportunities for philanthropic funders to support this work.

**Data for Evidence Landscape**
We are exploring the continued development of a living landscape – an open-source map that practitioners and funders could use to discover resources and opportunities in the market.
Partner Perspective

Boys & Girls Clubs of the Peninsula
BGCP is an evidence generating organization that uses data for continuous learning and ongoing program improvement, so that more of the youth we serve succeed in school and can live fulfilling lives. We have clear outcomes that unify us as an organization, programs intentionally designed to achieve our outcomes, and a deliberate investment strategy that keeps us focused, and adaptive to our community’s evolving needs.
BGCP STRATEGIC EVIDENCE PLAN GOALS

**Goal 1**
Clarify and Refine Goals & Strategies

**Goal 2**
Understand Implementation, Quality, and Dosage

**Goal 3**
Improve Program Models

**Goal 4**
Test and Build Evidence of Short- and Long-Term Outcomes

**Goal 5**
Use Evidence to Strengthen Learning Culture
Data for leadership and external audiences

Process
Manual, excel-based lookup and analysis
1. How many members are actively engaged in BGCP programs?

<table>
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<tr>
<th>Grade</th>
<th>Active</th>
<th>Not Active</th>
<th>Grand Total</th>
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<tbody>
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<td>3</td>
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<tr>
<td>K</td>
<td>80</td>
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Grand Total: 1,409 active, 391 not active, 1,780 total.

Users: Data used by internal staff and instructors

Process: Connected, automated through technology

Boys and Girls Club of the Peninsula
Attendance Report - March 2018
THANK YOU

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