



Social Impact Consultants

Discovering better ways
to solve social problems

Evaluating Social Innovation: Insights from the Field

A conversation with:

- **Hallie Preskill**, Managing Director, *FSG*
- **Tanya Beer**, Associate Director, *Center for Evaluation Innovation*
- **John Cawley**, Director of Programs and Operations, *J.W. McConnell Family Foundation*
- **Meg Long**, Deputy Director, *OMG Center*

November 14, 2012



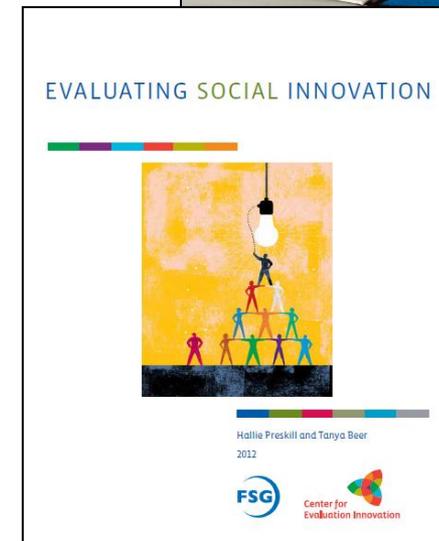
**Center for
Evaluation Innovation**

Today's Agenda

- ❖ **Overview of Developmental Evaluation and Social Innovation**
Hallie Preskill, FSG
- ❖ **Case Example: YouthScape**
John Cawley, J.W. McConnell Family Foundation
- ❖ **Case Example: Bill & Melinda Gates Foundation Community Partnerships Portfolio**
Meg Long, OMG Center
- ❖ **Audience Questions & Answers**
Tanya Beer (Moderator), Center for Evaluation Innovation
- ❖ **Wrap-up**

About FSG and Strategic Learning & Evaluation

- **Nonprofit consulting and research firm** founded out of Harvard Business School in 2000
- Staff of over 100 in Boston, San Francisco, Seattle, Washington DC, Geneva, and a presence in Mumbai
- Success in **strategic planning and evaluation** with over **200 foundations, corporations, and nonprofits**
- **Thought leader**
 - ***Evaluating Social Innovation*** published in 2012 (*funded and co-authored by the Center for Evaluation Innovation*)
 - Articles published in *Harvard Business Review*, *Stanford Social Innovation Review*, and *American Journal of Evaluation*, including ***Collective Impact*** (SSIR 2010)
 - ***Breakthroughs in Shared Measurement and Social Impact*** (*funded by Hewlett Foundation, 2009*)



FSG is driven by the same passion that drives our clients: a passion for greater social impact

Foundations, Nonprofits, and Corporations Are Striving to Address a Multitude of Social Issues in a Myriad of Ways

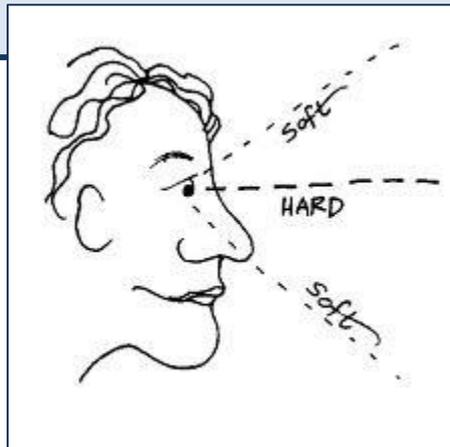


The challenges we are facing are complex, dynamic, and not easily solved

Defining Developmental Evaluation (DE)

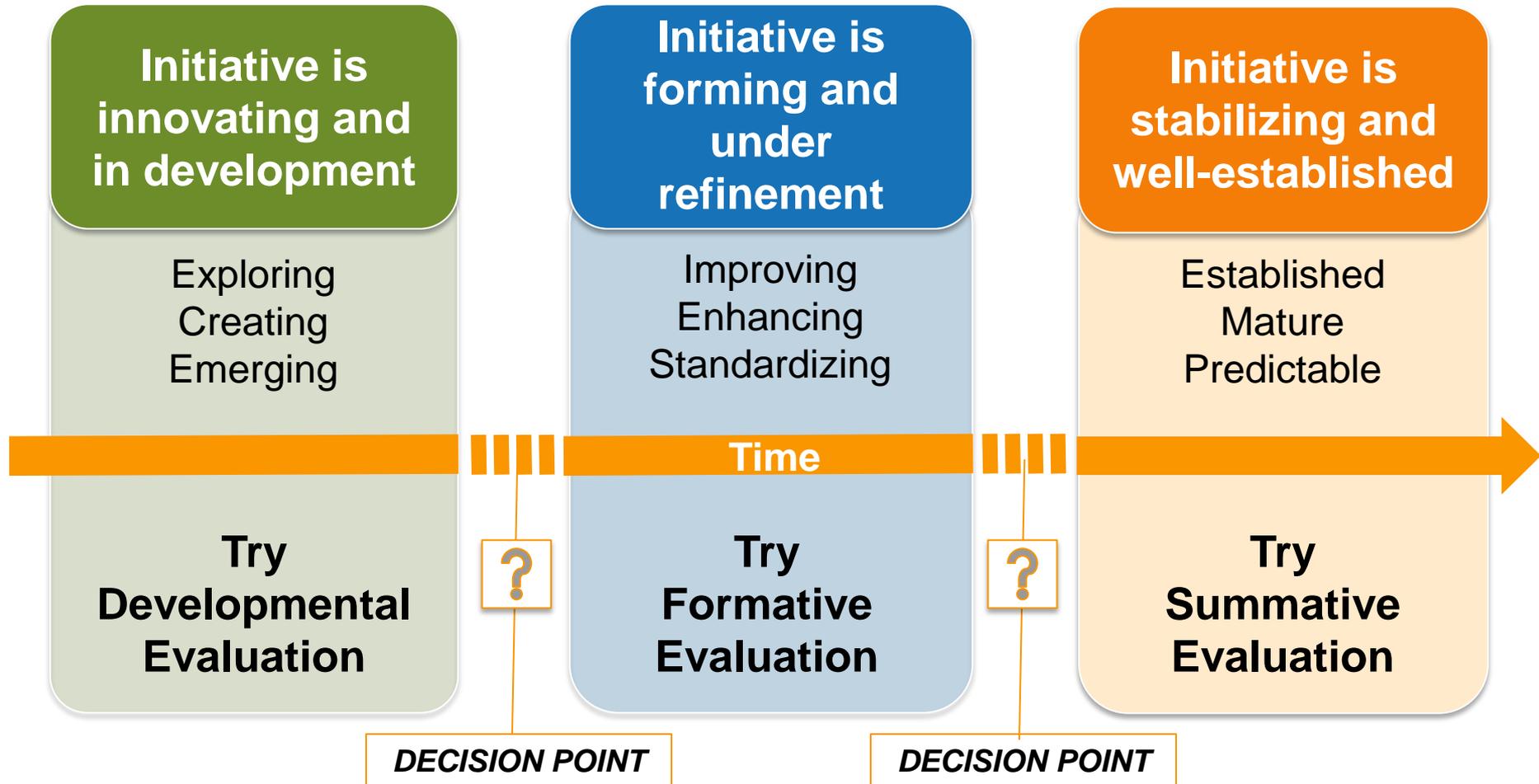
An approach to evaluation that is grounded in **systems thinking** and supports **innovation** by collecting and analyzing **real time data** in ways that lead to informed and ongoing **decision making** as part of the design, development, and implementation process.

-Michael Q. Patton



DE is particularly suited for innovative approaches to solving social problems where the path to success is not clear

DE Represents a Different Way to Engage in Evaluation



Developmental evaluation requires a certain level of readiness and commitment to learning

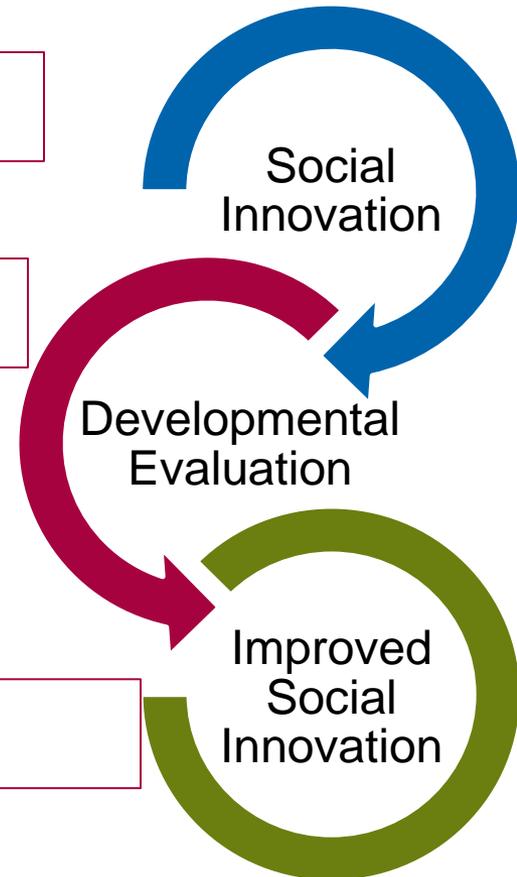
Developmental Evaluation Involves Working Closely with Clients to Inform Learning and Decision Making Processes

Context Analysis

Feedback Loops

Learning Facilitation

Ongoing Sense-Making



The nature of social innovation requires this integrated, responsive, and adaptive evaluation practice

Developmental Evaluation: Enabler of Change

YouthScape

- Youth engagement:
 - Head, heart and hands (youth)
 - Community projects
 - Institutional change
- Innovation: transforming youth-serving organizational culture
- DE: complex, diverse, changing environment = need for rapid feedback, course corrections

- *Purpose*: Improvement (local, national, sector) vs. accountability
- *Approach*: **Embedded** versus detached; **continuous** versus episodic; **learning** versus judgment
- *Role*: Feed “data” from sites into ongoing local and national process:
Action → Evaluation → Strategy
- *Results*: Fed back immediately to groups so that local action could be taken AND contributed to national community of practice

DE: A tool for making the path as we walk it

DE Is an Innovation Itself: Test, Fail, Learn, Improve

Organizational readiness for DE at multiple levels



- Documentation, training, and workshops related to DE, “failure”, innovation

Lack of trained, experienced DEs

- Community facilitation
- Emotional intelligence



- Ongoing training and resources from national DE
- Training of 2 cohorts of DEs nationally

Cost: The meter is always running

- A fully funded external DE is expensive



- Timing: invest early, then audit
- Internalize DE functions within organizational culture
- Develop guides, tools and skills for dissemination

DE is a fundamental element of rapid prototyping

DE: Part of the Foundation's Social Innovation Strategy



*YouthScape participants,
Saskatoon, Canada*

Advantages of Using a Developmental Evaluation Approach

Value for McConnell Foundation

- Practical support for grantees who are taking risks in uncharted territory
- Foundation has knowledge, experience to share with the philanthropic sector

Value for Social Change Organizations

- A useful, engaging methodology for improving practice in real time
- A powerful tool for organizational development; becoming an expressive organization

DE: Reality testing of your compass

From a Hunch, to a Theory, to the *Reality* of Change

Bill & Melinda Gates Foundation's Community Partnerships Portfolio

- **Ambitious undertaking:** Place-based, multi-sector partnership, multi-year strategy to increase postsecondary completion rates for low income young adults
 - **Many actors and moving parts:** 7 grantee communities, over 250 stakeholders, 2 technical assistance/coaching organizations, 1 evaluation partner, and 1 amorphous “theory” of change
 - **Highly exploratory:** Who can really champion a community-wide completion agenda *and* get people to change the way they do things?
- Purpose of the evaluation:
 - Understand the work on the ground
 - Explore how it differs in different contexts
 - Understand factors that impede or facilitate sites’ progress
 - Evaluator as integral partner to the investment “management” team
 - Not so much about the methods but the *process* to use what we are learning to shape the work on the ground and to *document* what we are learning
 - Emerging factors have implications for design and implementation of future investments

Learning, documenting, and refining AT EVERY STEP OF THE WAY

DE = R&D for the Social Sector

Shifting mindset from achieving specific outcomes to learning and understanding; this work is NOT about:

- What is the ideal _____?
- When will we see student level impact?

Not about testing an idealized model but about **co-crafting the approach**

- Different use of Theory of Change
- Wrong assumptions or dramatic changes in the context *are* good for us

DE requires **more than methodological and content skills** and the evaluation role is often blurry

- Evaluator as facilitator, therapist, measurement expert, advisor

Frequent, persistent, and consistent communication and shared reflection times

- Build a case for value-add of DE
- Use findings to increase likelihood of success

Use and refine *all your theories – implicit or explicit* - differently

- Remove the “magic happens here” gaps with strong articulation and understanding of how change happens
- Refine, drop, or repurpose your data collection tools AND metrics to reflect what you have learned

Structured, transparent, yet flexible processes and protocols go a long way

- Need for clarity about when we are taking on what role and how the information will be processed and used

DE Is Not for the Faint of Heart



Students from Community Partnerships site in Brownsville, TX

Advantages of Using a Developmental Evaluation Approach

Value for Evaluators

- Really challenges your thinking
- Stretches your skillset

Value for Social Change Organizations

- Significantly deeper insights and stronger implementation
- Authentic partners learning and championing the work with you
- One of the only approaches that *really* helps you learn from mistakes and make right-time significant adjustments

True innovation cannot happen incrementally and on the periphery

Audience Questions

Tanya Beer
Center for
Evaluation
Innovation



Hallie Preskill
FSG



John Cawley
J.W. McConnell
Family Foundation



Meg Long
OMG Center



Thank You!

- Today's webinar was presented in partnership with the **Center for Evaluation Innovation**
- **Thank you** for joining in the conversation today
- Please fill in the **brief electronic survey** that you'll receive after today's event to share your feedback with us
- For more information on **Strategic Learning and Evaluation** visit: <http://www.fsg.org/OurApproach/StrategicEvaluation.aspx>
- To access the **recording** and to **download the slides** from today's webinar, and the ***Evaluating Social Innovation* article**, visit <http://fsg.org/evaluating-social-innovation>

