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*

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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)


  - *Breakthroughs in Shared Measurement and Social Impact* (funded by Hewlett Foundation, 2009)

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**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
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

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

YouthScape participants, Saskatoon, Canada
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?

Frequent, persistent, and consistent communication and shared reflection times
- Build a case for value-add of DE
- Use findings to increase likelihood of success

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

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

DE requires **more than methodological and content skills** and the evaluation role is often blurry
- Evaluator as facilitator, therapist, measurement expert, advisor

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

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

Students from Community Partnerships site in Brownsville, TX
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/evaluatingsocialinnovation