Monitor Institute
by **Deloitte.**

Key resources for putting decision-making at the center

The following are a few practical guides, tools, and other resources for using monitoring, evaluation, and learning practices we found most useful to more effectively put decision-making at the center in your organization.

Organizational learning

- The Strategic Data Project at Harvard University's Center for Education Policy Research has a Strategic Use of Data Rubric and Self-assessment Guide that provides elements of effective data use across an organization, with steps to move toward using data more strategically.

- David Garnin et al.'s Is Yours A Learning Organization? Discusses organizational building blocks and provides a survey instrument for assessing learning within an organization.

- GEO's The Smarter Grantmaking Playbook: Learn for Improvement offers a range of documents providing guidance on learning, including how to use evaluation for learning, creating a learning organization, and developing a culture of learning for improvement.

- The Performance Imperative provides a framework to develop high-performing nonprofits that monitor for continuous improvement, have cultures that value learning, and assess effectiveness through evaluation.

- Marilyn Darling et al.'s Emergent Learning: A Framework for Whole-System Strategy, Learning, and Adaptation includes tools encouraging experimentation around strategies, and supporting whole-system learning, which requires shorter, faster, more rigorous real-time learning and more cross-pollination among peers.

- Katie Smith Milway and Amy Saxton's The Challenge of Organizational Learning identifies common barriers to knowledge sharing and defines key elements of learning.

Behavioral design and the science of decision-making

- Center for Evaluation Innovation's How Cognitive Traps Cut Us Short: Cognitive Traps in Philanthropic Decision-making tracks common cognitive traps that impact foundation decision-making and clear step to overcome them for more deliberative decision-making.

- The World Bank's World Development Report 2015: Mind, Society, and Behavior provides information on what is known about the science of decision-making, with implications for adaptive design and in a development context.

- The UK Government's Behavioral Insights Team wrote EAST: Four Simple Ways to Apply Behavioral Insights to synthesize the literature and their team's learnings about understanding of behavioral approaches.

- John Beshears and Francesca Gino's Leaders as Decision Architects reviews behavioral economics concepts and discusses implications for improving decision-making in organizations.

- Michael Quinn Patton's What Brain Sciences Reveal about Integrating Theory and Practice explores decision-making processes under conditions of complexity.

Key resources for putting decision-making at the center cont.

- Piyush Tantia's <u>The New Science of Designing for Humans</u> discusses the integration of behavioral science and impact evaluationto test and iterate on new ideas.

Data analytics and technology

- Matthew Salganik's <u>Bit by Bit: Social Research in the Digital Age</u> discusses social research in the digital age, bridging data science and social science.

- Global Pulse's <u>Integrating Big Data into the Monitoring and Evaluation Programs of Development Programs</u> details the characteristics of big data analytics and provides guidelines for integrating big data into monitoring and evaluation efforts. While it focuses on development programs, it has more general applicability as well.

- The <u>Data Maturity Framework</u> from University of Chicago's Center for Data Science and Public Policy helps you assess and improve your organizational, tech, and data readiness for data-driven social impact projects.

- The <u>Principles for Digital Development</u>, provides principles for using technologies in development projects through human-centered, contextually appropriate, collaborative, safe, and sustainable design.

- Kopernik's <u>Impact Tracker Technology (ITT) catalogue</u> features a compilation of low-cost, information communications technology-based tools intended to help those working in development collect data, communicate with their clients and measure their impact.

Rapid cycle evaluation and lean analytics

- HHS's <u>Rapid Evaluation Approaches for Complex Initiatives</u> compares a range of rapid evaluation approaches for projects at different levels of complexity.

- Acumen and Root Capital's <u>Innovations in Impact Measurement</u> discusses lessons learned from Acumen's Lean Data and Root Capital's Client-Centric Mobile Measurement initiatives, which apply innovations in data collection technology to enable inexpensive and quick-cycle customer feedback on social and environmental performance.

- Code for America lists <u>multiple resources</u> on iterative development and rapid idea testing.

Capacity building

- The Bruner Foundation's <u>Project Clearinghouse</u> includes multiple resources on evaluation capacity building, including training, coaching and technical assistance.

- CEP's <u>Assessing to Achieve High Performance: What Nonprofits are Doing and How Foundations Can Help</u> discusses how nonprofits are assessing their performance and what they need from funders.

- GEO's <u>How Can We Help Our Grantees Strengthen Their Capacity for Evaluation?</u> provides guidance on helping grantees improve their capacity for measuring impact, improving programs, and better serving communities.

- Jared Raynor et al.'s <u>Capacity Building 3.0: How to Strengthen the Social Ecosystem</u> discusses capacity building in the broader social ecosystem, new innovations and techniques being used for effective capacity building.

Key resources for empowering constituents and promoting diversity, equity, and inclusion

The following are a few practical guides, tools, and other resources for better empowering constituents and promoting diversity, equity, and inclusion in your organization and with organizations with whom you work.

Cultural competence and equity in monitoring, evaluation, and learning

- The Center for Culturally Responsive Evaluation and Assessment has a range of publications to help integrate cultural and contextual dimensions into evidence creation.

- American Evaluation Association has a Statement On Cultural Competence In Evaluation providing a definition of cultural competence, its role in evaluation, and essential practices.

- Jara Dean-Coffey et al. article, "Raising the Bar – Integrating Cultural Competence and Equity: Equitable Evaluation," describes the concept of equitable evaluation alongside and an approach for building equitable-evaluation capacity.

- The Racial Equity Toolkit provides tools on how to operationalize equity. While it's specifically focused on

  government efforts, it is also relevant for more general tracking of differential impacts, data on racial inequity, and constituent engagement.

- UNICEF has published a guide, How to Design and Manage Equity-focused Evaluations, on how to conduct and oversee evaluations that focus on the equity dimensions of interventions.

- Annie E Casey's report By The Numbers: A Race for Results Case Study offers lessons on using disaggregated data to inform policies, practices, and decision-making.

- UN Women's How to Manage Gender-Responsive Evaluation provides advice and tools for managing every step of an evaluation oriented to gender equality and women's empowerment, how gender and power relations change as a result of an intervention, and how interventions affect men and women differently.

- Racial Equity Tools includes an entire section on evaluation. Some are general evaluation tools and some are specific to racial equity, with a focus on issues of power and privilege.

- D5 provides resources for collecting demographic data.

Constituent insight and accountability

- Feedback Labs includes a number of guides and tools that address every stage of feedback loop creation, from design through course correction.

- Fund for Shared Insight shares learnings across multiple organizations in promoting the collection of feedback overall and through Listen for Good.

- Development Initiatives' Beneficiary Feedback Mechanisms: A Literature Review includes a list of projects involving beneficiary feedback.

- The Global Partnership for Social Accountability has a knowledge repository with a range of materials related to social accountability.

Key resources for empowering constituents and promoting diversity, equity, and inclusion cont.

- Threlfall Consulting's Perceptual Feedback: What's It All About provides definitions, typologies and techniques for gathering constituent perceptual data.

User-centered design and customer experience

- Stanford's Design School provides a range of design tools and resources.

- Code for America lists user-centered design resources, including guides and toolkits.

- The Global Innovation Exchange lists resources for human-centered design, including ones with specific attention to evidence of impact and evaluation.

- Paul Brest et al's Problem Solving, Human-Centered Design, and Strategic Processes applies human-centered design principles for the social sector to help foundations improve their understanding of the problems they are trying to solve.

Participatory and community engagement

- The AEA's Collaborative, Participatory & Empowerment Evaluation TIG has a number of resources for evaluations that involve stakeholders in the evaluation process and that provide communities with the tools and knowledge to monitor and evaluate their own performance.

- The Art & Science of Place-based Evaluation, which grew out of a convening by the Aspen Institute, Jacobs Center for Neighborhood Innovation, and Neighborhood Funders Group, synthesizes place-based evaluation's topics and themes, involving "adaptive, learning-based models to support change."

- Laurenellen McCann's Experimental Modes of Civic Engagement in Civic Tech: Meeting People Where They Are compiles multiple processes for integrating user-centered design and community engagement into community-driven processes for creating technology for the public good.

- The Building Movement Project's Nonprofits Integrating Community Engagement Guide includes tools and resources to help nonprofit groups develop core competencies on constituent and community engagement, including for evaluation and measuring impact.

- GEO's Building Community Capacity for Participation in Evaluation provides steps for engaging community residents in evaluation and learning.

- Harnessing the Power of Collective Learning, edited by Roy Steiner and Duncan Hanks, provides case studies and insight on the value of feedback, accountability, and constituent voice to enable constituents and communities to transform their circumstances.

Constituent data privacy and security
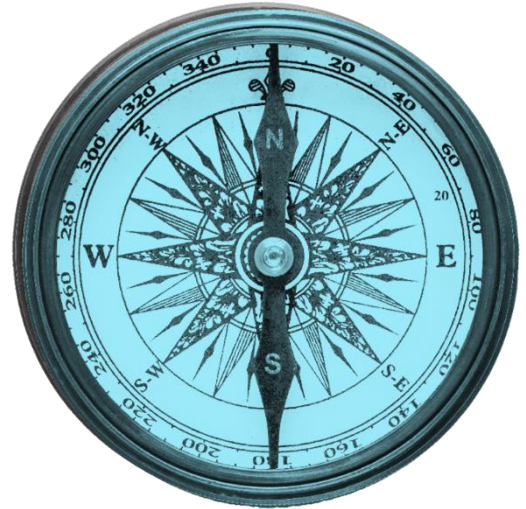
- Digital Impact at Stanford's Center on Philanthropy and Civil Society provides policy and agreement templates, tools and resources for protecting digital data and the privacy and security of constituents.

- The Responsible Data Forum lists practical tools and resources on data security and developing responsible data policies.

- The UN's Office for the Coordination of Humanitarian Affairs offers the guide Building Data Responsibility into Humanitarian Action.

- The Cash Learning Partnership has multiple resources on personal data protection.

Key resources for learning at scale

The following are a few practical guides, tools, and other resources for more productively learning at scale in the issue areas relevant for your organization.

Transparency, open knowledge and licensing

- Glasspockets has transparency tools to help foundations become more transparent, including a practical guide Opening Up: Demystifying Funder Transparency.

- IssueLabs lists collectively created open publishing principles, as well as guidelines for open knowledge practices, open licensing and enabling better discovery and tracking of your publications.

- Creative Commons provides Open Licensing Resources for Foundations, including examples of foundation policies, how to communicate open licensing and attribution best practices.

- Hewlett has publicly shared a toolkit it uses to assist its staff in advising grantees about its open licensing requirements, including grantee communications resources.

Repositories

- IssueLabs has guidelines for the use of open repositories and includes information about how to use an open repository to share your existing website publications and how to create a repository.

Open data

- Open Knowledge International's Open Data Handbook discusses the legal, social and technical aspects of open data, as well as including open data resources. OKI hosts Dataportals.org, which lists open data portals from around the world.

- The Open Data Initiative has a number of open data guides, including practical guides related to writing an open data policy, data licensing, and creating a resilient data ecosystem.

- NYU's GovLab has produced a report with Omidyar Network, Open Data Impact: When Supply and Demand Meet, that includes social sector examples and information about enabling conditions and challenges for open data projects.

- The National Neighborhood Indicators Partnership (NNIP) has a Guide to Starting a Local Data Intermediary that explains how to establish and operate information systems on local conditions that provide direct, practical value for nonprofit organizations, governments, foundations, and residents.

- The National Neighborhood Indicators Partnership's Lessons on Local Data Sharing provides strategies and examples of agreements to obtain local government agency data for data sharing. The site also includes information about open data resources and initiatives.

- The Open Data for Development Network's Open Data Impact Map is a public database of organizations that use open government data from around the world.

Key resources for learning at scale cont.

Shared learning and learning communities

- GEO's Learning Together: Actionable Approaches for Grantmakers provides key steps that grantmakers can take to make shared learning work.

- GEO's guide Learn and Let Learn: Supporting Learning Communities for Innovation and Impact provides information about how to build successful learning communities.

Common standards

- Community Indicators Consortium lists resources in the creation of community indicators, as well as a database of community indicator projects that often span public, private and social sector organizations

- BetterEvaluation provides a list of outcomes and performance indicator resources across a range of issue areas.

- Guidestar's Common Results Catalog includes a range of (mostly output) metrics across multiple issue areas.

- PerformWell provides a range of outcome indicators across multiple issue areas.

Integrated data systems

- University of Pennsylvania's Actionable Intelligence for Social Policy provides resources on integrated data systems, which link individual-level administrative data from multiple sources. Resources include legal agreements and other supporting documents, best practices, and examples of use.

- The National Neighborhood Indicators Partnership has resources on Integrated Data Systems.

Data collaboratives

- NYU's GovLab has produced multiple resources on the creation of data collaboratives, including information about types of data collaboratives, examples, and a guide to designing data collaboratives.

Systematic reviews

- 3ie has resources on how to collect and where to find systematic reviews.