



Research & Development

A New Form of Evaluation

Housekeeping Q & A



Can I ask questions during the webinar?

Yes, use the panel on the right-hand side of your screen to type and submit questions.

Will today's webinar be recorded?

Yes, audio and video will be available and will be archived on TCC Group's website, www.tccgrp.com.

What if I have follow-up questions?

You can email any questions after the webinar to info@tccgrp.com.

Session Agenda



- The Need for Learning
- Why Nonprofits Aren't Learning
- Evaluation vs. Research & Development
- Nonprofit R&D



The Need for Learning

Leadership = Success



Leadership is key to:

- ✓ Sustainability
- ✓ Lifecycle Advancement
- ✓ Effectiveness

There's More to Leadership...



- Advancing effective communication of mission and vision to internal and external stakeholders
- Engaging internal and external stakeholders in planning
- Taking decisive action when faced with challenges
- Making decisions anchored in cost-effectiveness
- Demanding accountability that includes demonstrated success with those being served/targeted

Only one in four nonprofit organizations is well led...

The Key to Leading Is Learning



The following organizational learning behaviors are significantly and singly the biggest predictor of organizational leadership:

- Creating sophisticated financial, operational, programmatic and environmental data-gathering and learning processes
- Spending time leveraging program data for making meaning, decisions, designs and plans, not accountability or validation
- Infusing learning into ALL planning, anchored in program success
- Taking immediate and decisive action, particularly at a human resource level, as indicated by strategy research findings

Only one in four nonprofit organizations is an effective learner...

R&D Behaviors Facilitate Sustainable Growth



TCC found **six organizational behaviors** that explain why some organizations grow at or greater than the rate of inflation, while others do not. Specifically, organizations are **significantly more likely to grow faster** if they engage in the following R&D behaviors:

1. **NOT** evaluating to decide **if** a whole program works or has value, but instead, learning which specific program design elements worked and for whom.
2. Using data gathered directly from program recipients to refine and improve programs, rather than data provided by the program implementers.

R & D Behaviors Facilitate Sustainable Growth



3. Engaging key leaders and staff in making meaning from client-derived data.
4. Developing program management practices and tools that prioritize the consistent delivery of “what works” over non-programmatic human resource management needs.
5. Determining appropriate client outcome measures by listening to “on-the-ground,” individual, success stories, rather than population-wide social impact stories, desired by those not living with the problem or condition (i.e., funders).
6. Design leaders assessing the resource feasibility of program improvements/fixes/re-designs.

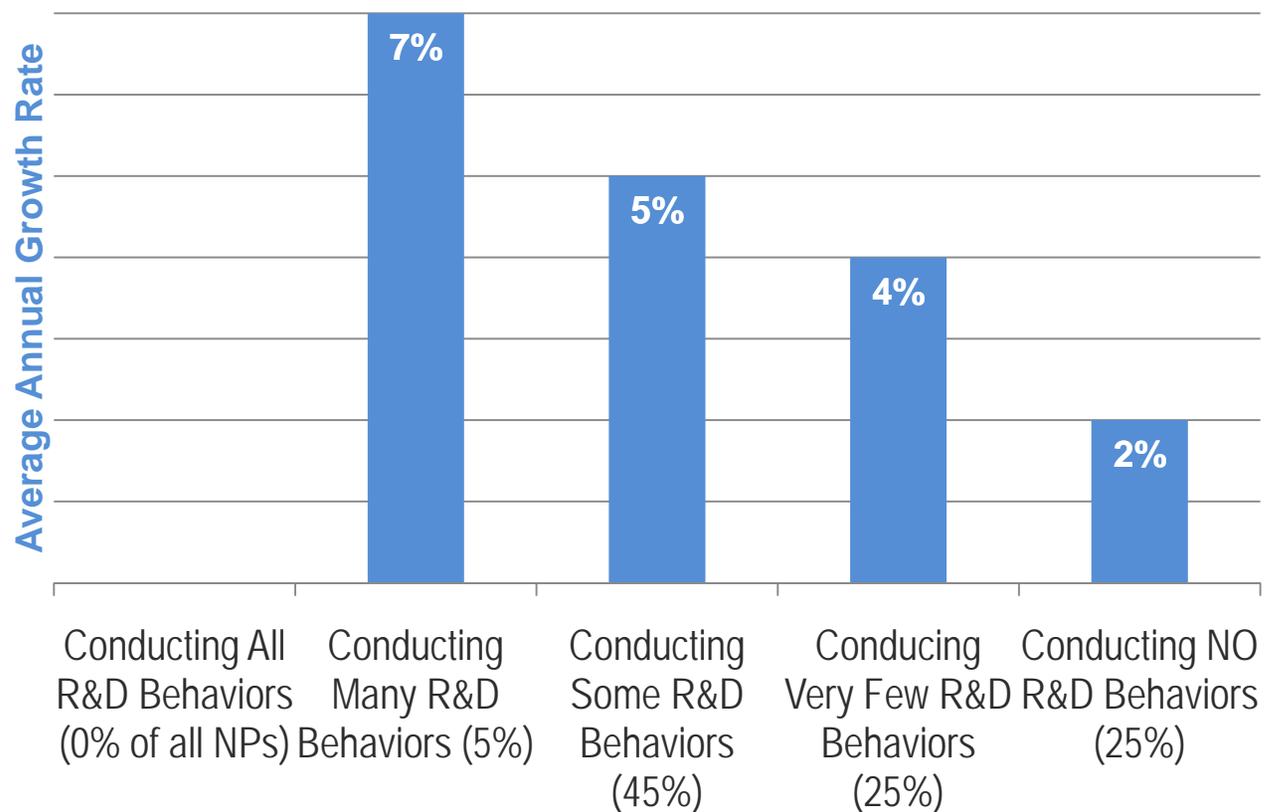
R&D Facilitates Sustainable Growth



41% of nonprofits grow faster than the rate of inflation over a three year period

Nonprofits where leaders engage in R&D behaviors are 2.5 times more likely to grow faster than the rate of inflation.

Average Annual Growth Rate
(Mean Per Year, Based on Three Consecutive Years of Data)





Why Aren't Nonprofits Learning?

The Investment Model Is All Wrong



- There's **no** “*outcome synchronicity*” between the investor and investee
- Effectiveness and accountability **must be** viewed through the measurement of proximate effect
- Proximate cause-and-effect is the **only** way!
- Learning **requires** understanding the cause, **not** the effect
- There's no Research & Development for programs/initiatives

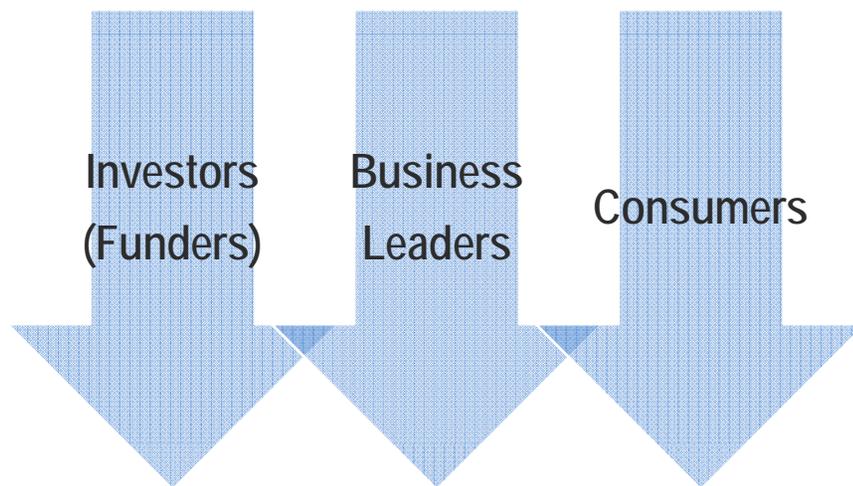
What Results Do Investors, Business Leaders, & Consumers Want?

Example: In-Home Support Services to New Parents, For-Profits vs. Nonprofits



For-Profit Results:

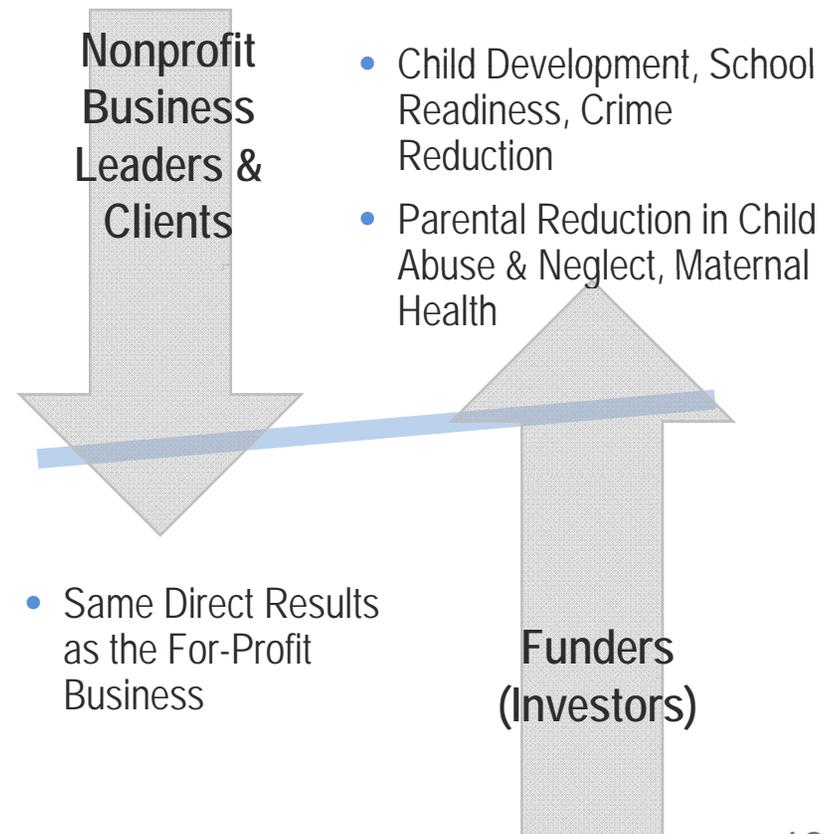
Just Give Me (or Show Me) the Direct Results, Please...



Recuperation, parent-child bonding, healthy adjustment to family change, tools for care and feeding, stress-reducing routines and habits, better communication skills with providers

Nonprofit Accountability:

Just Give Me the Direct Results, But Somehow Prove to "Them" That We Can Do Much More...





Why Evaluation Isn't Learning

Why Evaluation Isn't Achieving Learning



1. Makes uncontrollable/unattainable community impact and/or long-term outcomes the metric of success
2. Typically assesses the “whole” program/strategic effort, not its component parts
3. Aspires to a scientific research design ideal that is appropriate for large-scale population studies to achieve “*generalizability*,” but not for context-specific, real-time learning
4. Gathering data from the wrong source – implementers and secondary data sources, not the direct recipients/targets



Evaluation vs. R&D

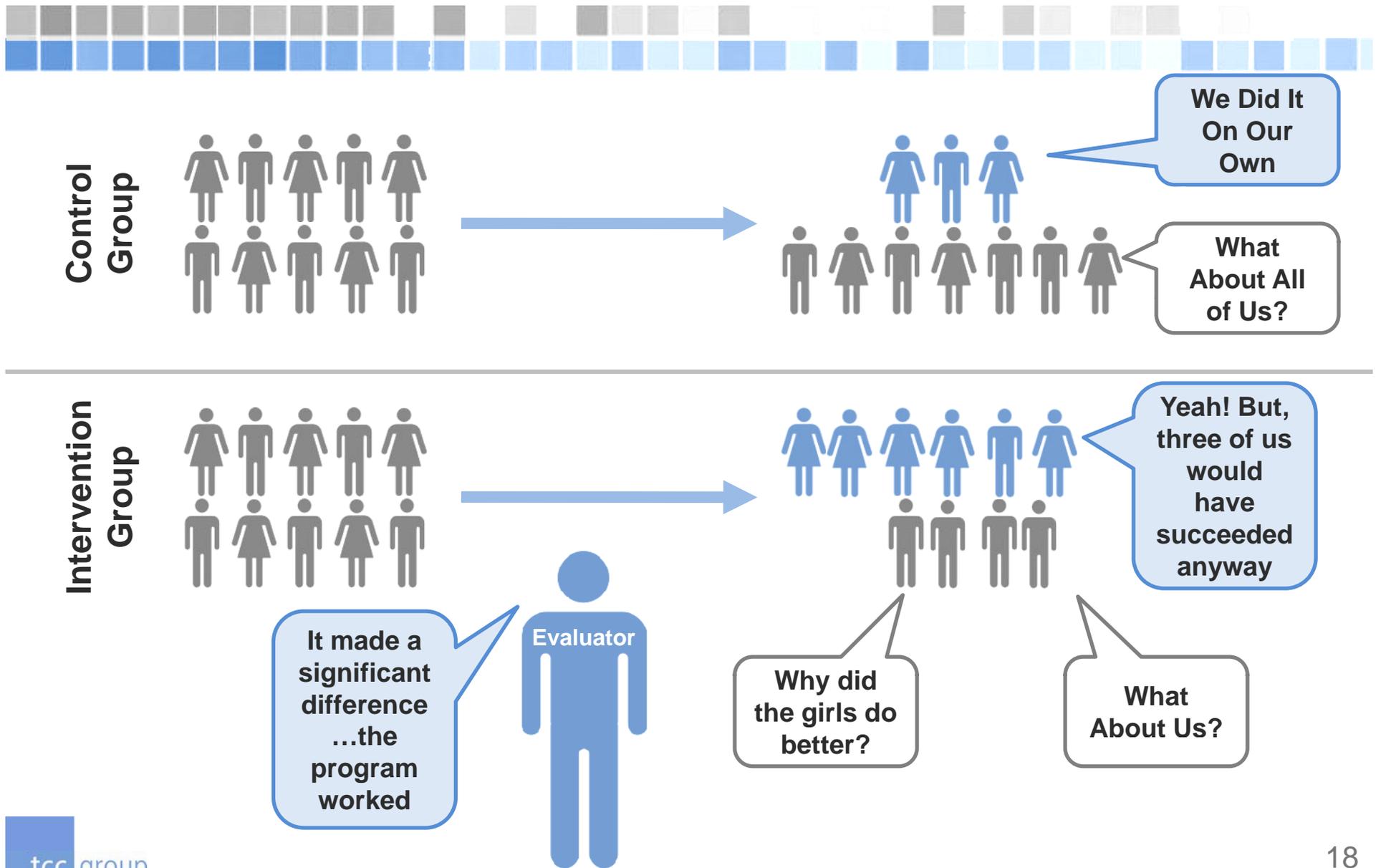
The Difference Between Evaluation and R&D: A Metaphor



Evaluation: the ticket holder determines success by the scoreboard.

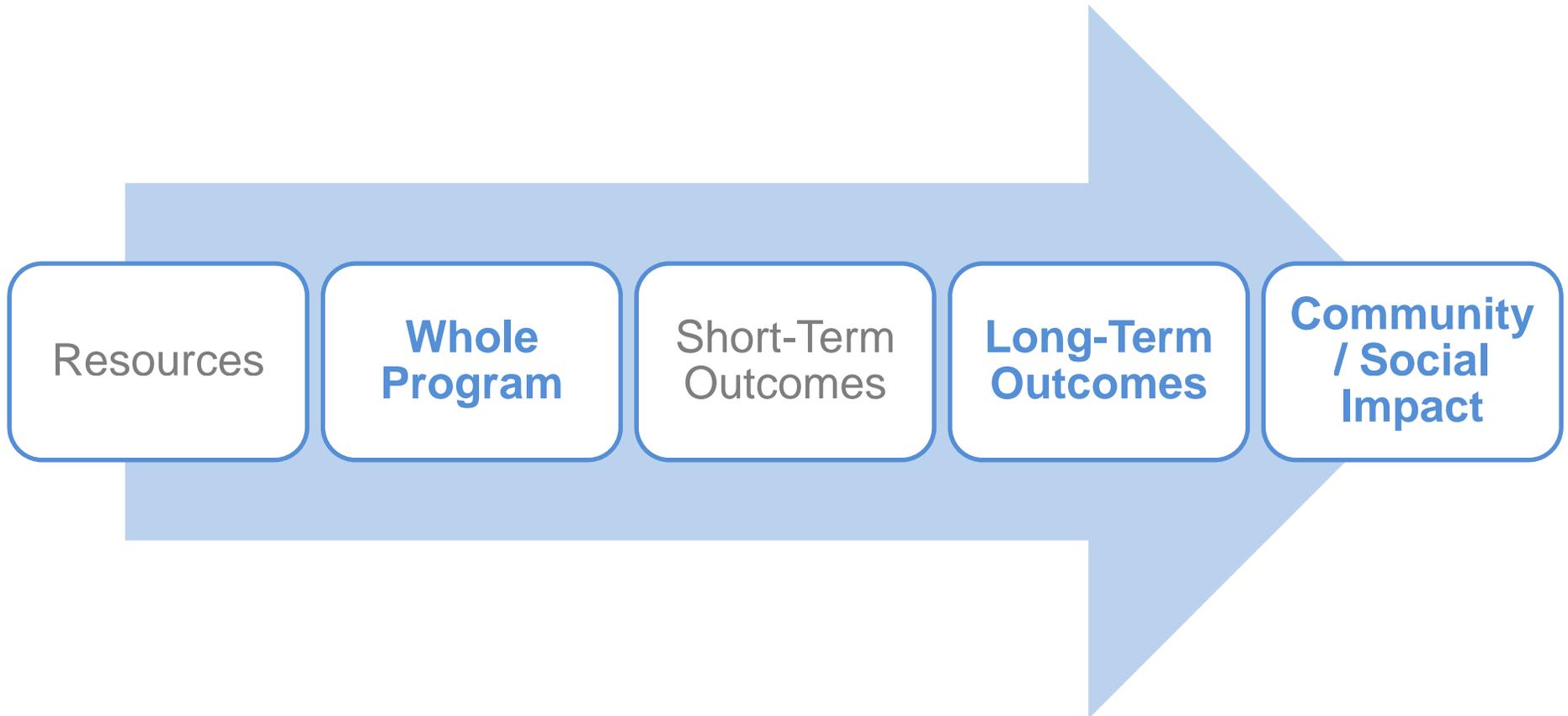
R&D: the coach/manager figures out how to improve the odds of success by analyzing the game film.

The Ethical Problem with the Ideal Evaluation Design



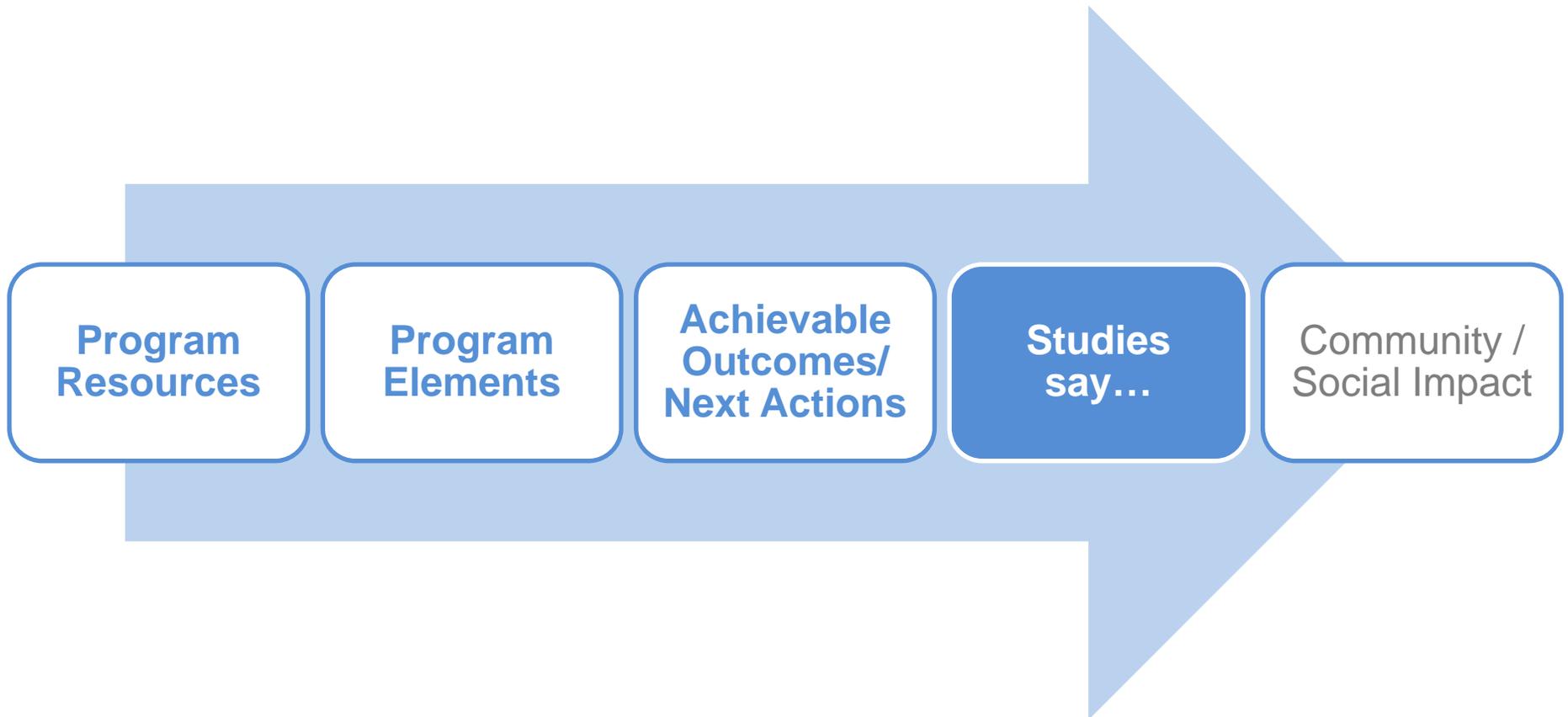
Evaluation

Determining a "Whole" Program's Long-Term Impact to Judge Social Value



Research & Development

Measuring Program Success for "Best Practice" Replication and Scaling





Nonprofit Research & Development

What is Nonprofit R&D?



The following revision of the previously cited key organizational **learning** behaviors contain the key elements of what R&D should look like for nonprofits:

- Programmatic/strategy-centered data-gathering to identify: what works, for whom, under what conditions, and with what resources.
- Organizational and programmatic leaders analyzing program data in order to innovate, strengthen, repair, refine and/or re-design program elements/components/practices, in order to maximize achievable success.
- Acting on R&D lessons by changing program and organizational policies, operations, procedures and processes.
- Monitoring R&D-identified program quality/best practices.



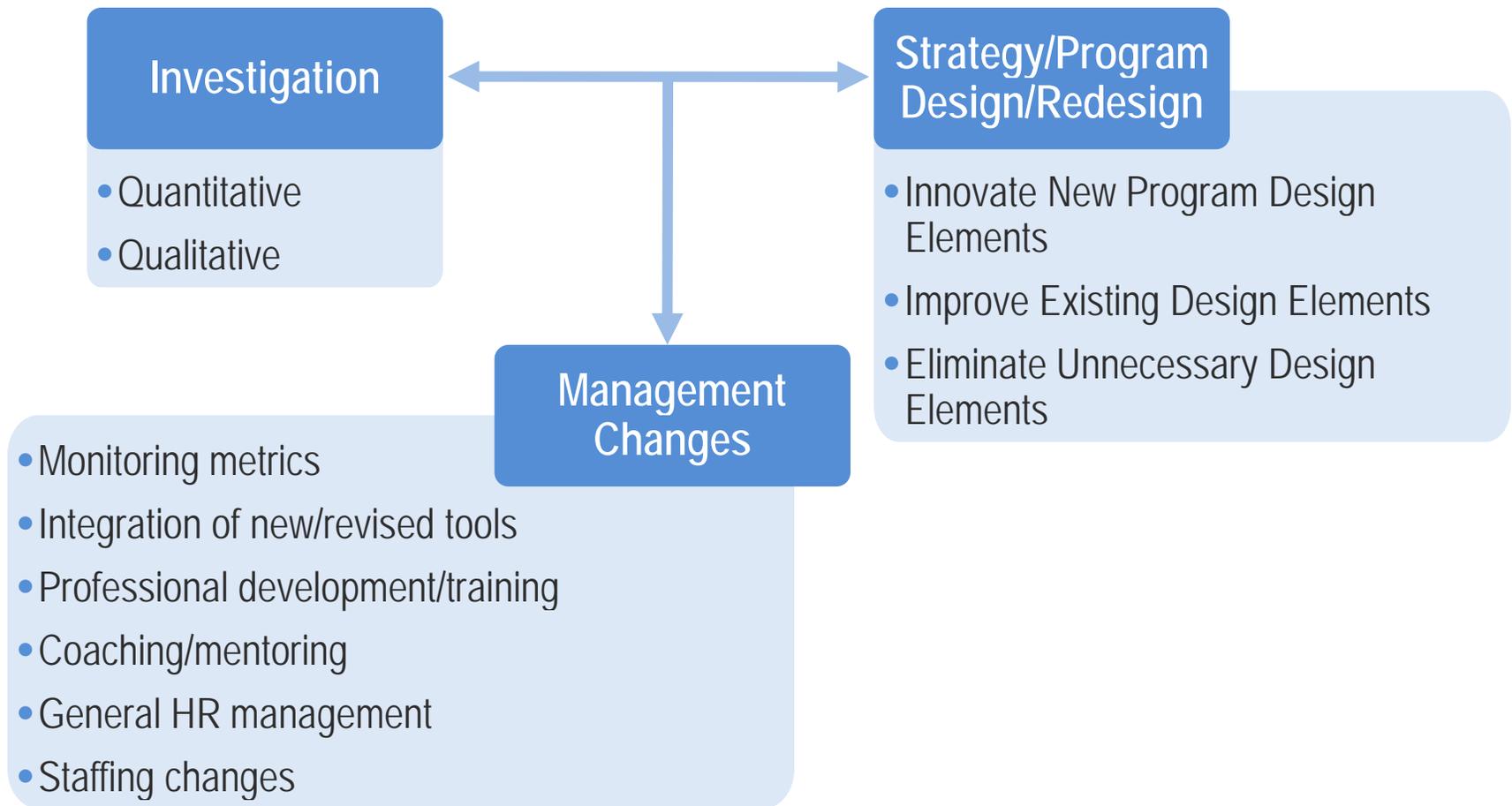
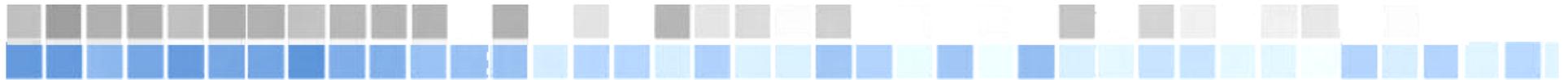
How to Do R&D

Guiding Principles for Conducting R&D



1. Provide the technical tools and resources needed.
2. Measure achievable outcomes, next actions, direct results.
3. Gather as much data as is possible, QUICKLY, by quantifying the qualitative.
4. Gather all data by asking the recipient/target, not the implementer.
5. Analyze for patterns of cause-and-effect.
6. Program leaders, designers and implementers meet often to analyze data, make meaning, and make improvements.

Overall R&D Approach



Typical Steps in R&D



1. Positive Deviant Experiment (no more than 1 month)
2. Lit Review to Make the Case for Proximate Outcomes
3. Proximate Logic Model Creation
4. Full R&D, Project I, Qualitative (no more than 3-4 months)
5. Full R&D Project II, Quantitative (no more than 2-3 months)
6. Creation of communications, training documents, dashboards, etc.
7. New R&D Projects (no more than 3-4 months)

Nonprofit Capacity Needs (Readiness) for R&D



- Data gatherers
- Cause-and-effect analysts for qual and quant
- “Making Meaning” facilitators (translators)
- Technology for data and dashboards
- Communication tools & processes



Questions? Email info@tccgrp.com

We will post this presentation to our website,
www.tccgrp.com, shortly.