

CONSTRUCTIVE DISSATISFACTION

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KELLY'S STORY

I (coauthor Kelly) began my career in the social sector over twenty-five years ago at a large multi-service organization in Boston that offered an array of education, workforce, health, and early education programs to single-parent families, adults, and students experiencing poverty. During my time there, we developed a program that directly engaged parents in building early literacy skills to prepare children for kindergarten. The program was highly successful and popular with mothers and their children. The state of Massachusetts expressed interest in expanding it, but told us we needed a third-party evaluation as a condition of funding. We could not afford to foot the bill on our own, so I approached one of the few foundations that supported evaluation work at the time. The foundation declined my request, and the program officer went on to tell me that it would be “a complete waste of money to fund the evaluation because the target population was too risky, too transient, and anyway—those moms don’t really care about their kids.”

While the callousness of this particular program officer was unusual, versions of this story, unfortunately, are not. Rather than being fueled by productive partnership focused on learning and improvement and dedicated to achieving stronger and more equitable outcomes, evaluation in the social sector was largely top down, driven by the objectivity (and bias) of the

expert, set to a thumbs up or thumbs down meter, and not predicated on trust or learning. In the words of Ballmer Group co-founder Connie Ballmer, “I didn’t realize that evaluation was so punitive.”

As I migrated from direct services into philanthropy, I learned how much donor and political intent shaped the social sector’s approach to building evidence, for better or worse. During the early years of venture philanthropy, there was a call for greater emphasis on performance data but little exploration of whether that performance data translated to real programmatic outcomes for program participants. In fact, many considered evaluation the polar opposite of innovation—an overly academic exercise that was sluggish and a waste of money. Then the fixation with scale set in (a fixation I wholeheartedly and naively adopted), and much of the social sector began spreading interventions to new communities without asking sufficient questions regarding how an intervention and its outcomes in one community might translate to another.

As the notion of evidence crept into philanthropy’s investment theses and frameworks, and the notion of evidence-based policy caught on through the George W. Bush and Barack Obama administrations, an overreliance on a few evaluation methods—most notably randomized controlled trials—emerged. This had the unintended consequence of creating a fixation with “getting on the list” of preferred service providers by practitioners, and creating an incentive for evaluators to skew studies toward what met the framework requirements (and, therefore, what might be more lucrative) rather than generating the right evidence for the right people at the right time.

For a period of time, I served as a coach to CEOs and executive directors who were working on their strategies for impact. One of the CEOs I coached received findings from a multiyear randomized control study of their work that found positive results in two of three intended outcomes. Instead of celebrating wins and focusing on what could be learned from the results, the CEO was terribly anxious about how their funder would react to two out of three. They worried their funder’s reaction would be thumbs up or thumbs down versus positively embracing what worked and learning from what did not.

Practitioner-grantees of philanthropy and government, whose success is their grantmaker’s success, have too often and for too long feared challenging donor guidance on evaluation design or choice of evaluator because

donors held the purse strings and, thus, the power. Practitioners often lacked the knowledge and proof points to advocate for measurement approaches best adapted to their context. Nor did funders offer them resources to build their own evidence plans. Instead, funders standardized an approach and plugged grantees into it. Hence, practitioners most responsible for delivering quality programs became least empowered to shape their evidence agendas.

Of course, there were exceptional cases. Many funders pointed to maternal-child health nonprofit Nurse-Family Partnership's (NFP) own approach as a gold standard for evaluating social programs. As I sat at a turning point in my career, I realized a glaring irony. NFP was lauded as the exemplar, yet NFP's approach to building evidence—continuously, with smaller studies leading to increasing confidence, more data collection, more improvement, and bigger studies at multiyear intervals with blockbuster impacts—was at odds with what our evaluation and funding industry supported as a rule.

For far too long, practitioners have been the caboose of the evidence train when they should have been the engine. They should be active leaders in evidence building, not at the mercy of research and evaluation shops but in partnership with them and with their funders, aligning their goals and interests. No one cares more than practitioners that their theories of change work as intended. But that requires change. So, as someone who grew to embrace the power and possibility of better evidence building over my career, I became what my friend and Project Evident alum Dr. Charles Carter would call “constructively dissatisfied,” and reached out to trusted colleagues to explore new thinking. One of those colleagues was the coauthor of this essay, Archie Jones, who came from the private equity world, working with a team of excited dreamers on the prospect of bringing innovation to the social sector.

ARCHIE'S STORY

That's right! I (coauthor Archie) was a venture investor on a mission to make it easier to scale high-impact nonprofits. The idea was simple: increase the amount and types of capital available to promising nonprofits so they could scale faster and more broadly to accelerate the pace of innovation and impact. I found myself asking a question similar to Kelly's: How do you

know which innovations are ready to scale, and how do you measure how efficiently and effectively they scale after you have invested? How can you avoid defaulting to the usual standards of measuring inputs and outputs?

Inspired by social entrepreneurs whom my venture philanthropy team funded, and frustrated with the lack of strong data and evidence and tools for making informed decisions, I also believed that better evidence would lead to better strategy, and better strategy would lead to higher impact. I wanted to found an organization for this purpose, hoping to provide a set of tools, frameworks, and processes for the sector to make better use of data in efforts to achieve impact. Like most innovators, I pursued collecting better, cheaper (but not cheap), and more quickly accessible data and evidence. My definitions:

- Better:** More strategic about what data to collect and use (leading indicators on outcomes)
- Cheaper:** Using tools and technology to lower the cost of implementing a data strategy
- Faster:** Testing early and often to support the continuous refinement of an innovation

My team and I also envisioned data and evidence as being tools investors and funders could use to achieve more equitable outcomes. Data and information gaps either increase perceived risk or mask inherent risks, with either scenario stifling investment. This means that underserved communities actually are communities where we have underinvested—not because there aren't superior returns to be gained and impact to be had but because we overestimate the risk—or, more importantly, do not fully understand the risk-reward relationship. Data and evidence are crucial to better risk analysis and stronger, more equitable returns.

I knew that social entrepreneurs struggling to bring their ideas to life need capital—not just financial capital but, more importantly, information capital, which allows them to iterate and refine their hypotheses and test high-impact and sustainable solutions. Helping social entrepreneurs design an evidence strategy that will ensure a steady flow of information capital gives them a tremendous advantage. It not only helps them report to others on progress but, more importantly, to create a stronger, internal culture of learning.

THE STORY OF PROJECT EVIDENT

And so, with initial support from the Edna McConnell Clark Foundation and joined by five other funders, we—Archie and Kelly—founded Project Evident in 2017 to transform the evidence ecosystem by elevating practitioners and the communities they serve. After extensive research and interviews with nonprofits, funders, and policymakers, we decided on a platform of shared services (consulting, tools, and technical assistance) staffed with leaders from philanthropy, technology, policy, analytics, and nonprofit management and working with existing service providers. Though our platform would help practitioners prepare for rigorous third-party RCTs when appropriate, our primary focus was on exploring a wider range of evidence that focused on practitioner learning needs and continuous improvement. We blended this platform of services with field-building efforts to contribute to a healthier ecosystem that would enable a practitioner-centric, R&D approach for the social and education sectors and change the incumbent approach to evaluation.

Our core offering at Project Evident is the strategic evidence plan (SEP), which we developed alongside social sector organizations with the recognition that the field needed a new, strategic approach to continuous evidence building that went beyond the one-study-at-a-time mindset. SEPs are designed to advance actionable, practical knowledge needed to build and scale solutions, and to listen to the voices of practitioners and community members—making the process of building evidence more equitable. As we have grown and recognized needs in the field, we have added a number of other direct service and technical assistance offerings to support nonprofit organizations, funders, intermediaries, government agencies, and education agencies.

We also recognize that practitioner-centric and actionable evidence building is not required just at the organizational level. The evidence ecosystem currently lacks the incentives and enabling conditions that would support effective data infrastructure development and evidence-building activities. And social investors lack incentives to explore opportunities in unfamiliar areas with unfamiliar people—they need actionable evidence to analyze risk. We also must address the broader policies, structures, and orthodoxies in the ecosystem to support more actionable, equitable, and continuous evidence building and to assure that all forms

of capital can flow more freely to traditional and emerging markets of social return.

This shift requires that we educate stakeholders, including practitioners, funders, policymakers, researchers, and technical assistance providers to promote investment in research and development that will inform a more productive market for outcomes. We use proof points from our direct services work to help the broader field understand, in a user-friendly way, the key elements of continuous evidence building and what they look like in practice. Our ecosystem efforts to scale knowledge and practice span a range of activities, including the development of this book.

THE NEXT GENERATION OF EVIDENCE

We share this moment with other field leaders, who are fundamentally rethinking impact and what that means across multiple sectors. Our vision and work at Project Evident contribute to a next generation ecosystem that supports more equitable and actionable evidence building. We hope, on this journey, to collaborate, humbly, with other leaders on:

- Understanding the structural drivers of racial inequity, and using data to help us spotlight gaps and move swiftly toward more equitable outcomes.
- Helping policymakers further embrace evidence and make long-term commitments to data gathering and use beyond evaluation, including building their staff capacity and changing regulations to make evidence building an allowable federal cost across all government agencies.
- Using actionable evidence to broaden selection criteria for grantees and reassess funding approaches like cash transfers and making flexible, unrestricted funding a philanthropic norm.
- Broadening impact investment practice to consistently value nonfinancial returns like increasing equity and ESG.
- Aiding researchers, evaluators, and technical assistance providers as they reassess their roles and examine their own practices as organizations like the Equitable Evaluation Initiative, We all Count, Equal Measure, and many others who have contributed to this book advocate for fresh approaches.

- Learning alongside practitioners who are leading the way, serious about the impact they are delivering and eager to know where their theories of change are working, where they are not, and how to improve.

We look to field leaders as potential partners in this endeavor to help practitioners achieve sustainable funding, better infrastructure, and conditions that enable program success. And we invite those on a similar journey to channel constructive dissatisfaction into a commitment to evidence building to accelerate positive and sustainable change as we navigate a world of uncertainty.