Simplifying the Complex: Hard & Soft Measurements in Community Change

Mark Cabaj, September 28, 2017

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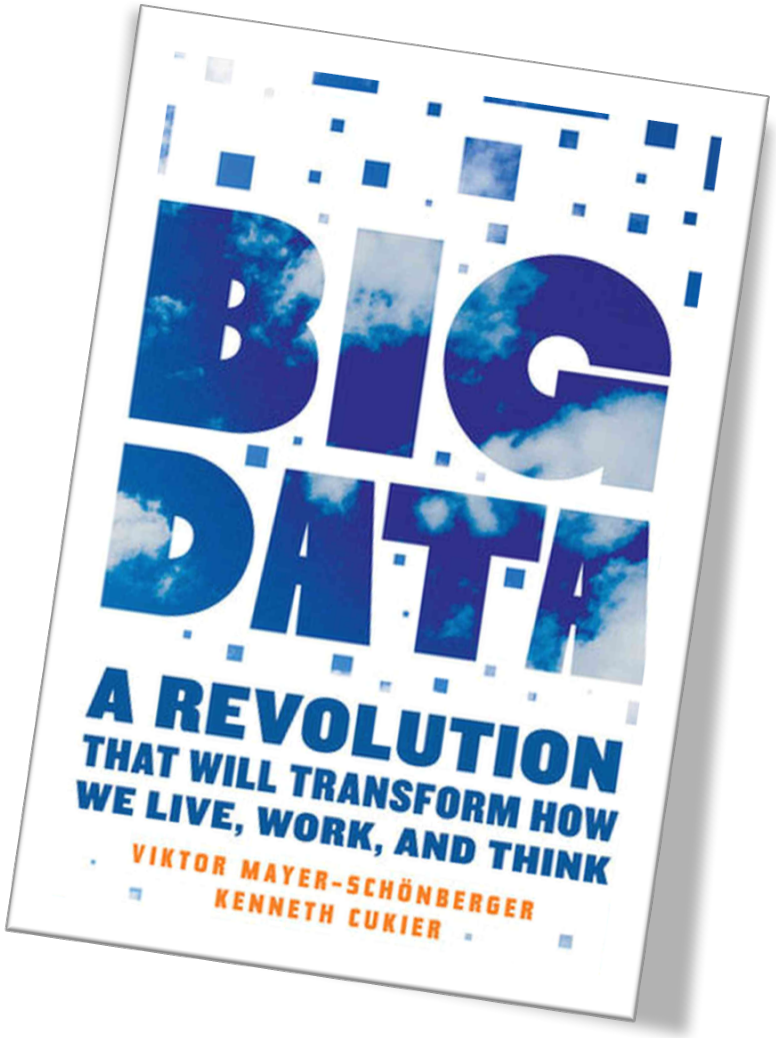
www.tamarackcommunity.ca

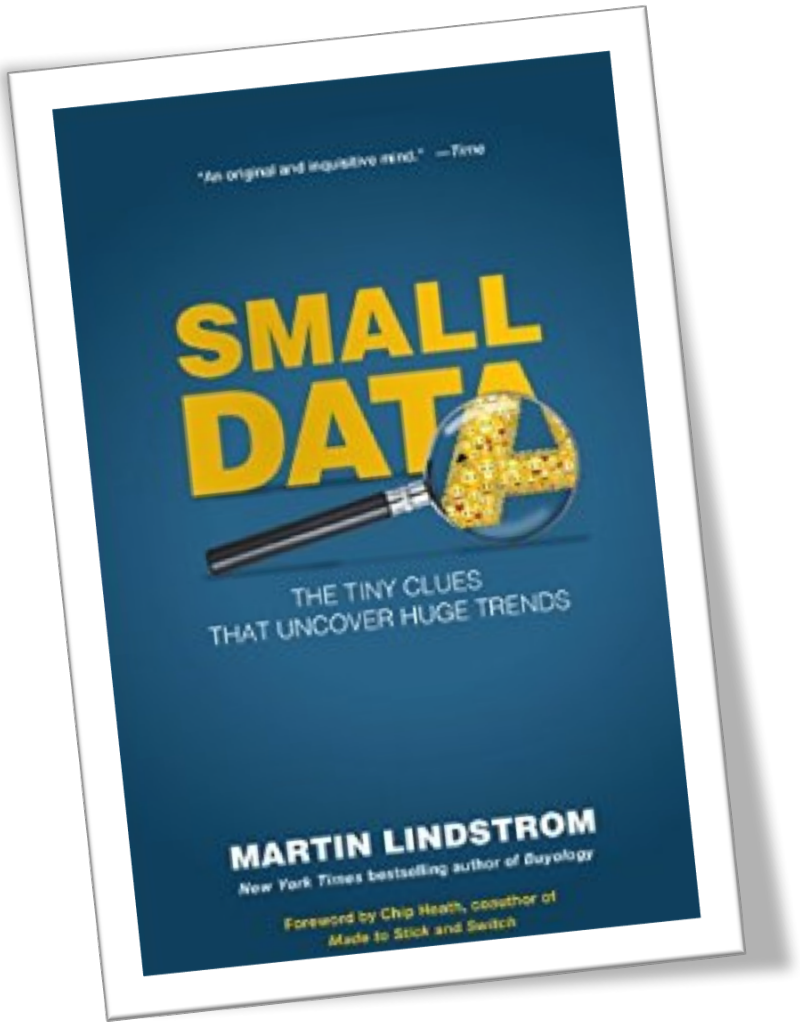
9540-145 Street
Edmonton, Alberta, CA
T5N 2W8
P: 780-451-8984
F: 780-447-4246
E: Mark@here2there.ca

Pairs

Find a partner and each take 3 minutes to describe a concrete project or initiative in which the discussion of ‘hard and soft’ measures is a central theme or challenge.

Why This Workshop? A Tale of Two Books





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The Key Points

1. Social innovators and evaluators need '**data**' for (at least) three tasks in community change efforts: discovery, design and feedback.

2. There are two broad types of data – **quantitative & qualitative** – that can be employed in all three tasks.

3. We need to **integrate** both types of data in our work to be effective.

4. There are (at least) three types of **mixed methods** we can use to integrate both types of data.

5. Measurement is an important part – but **only a part** – of larger work of strategic learning and management in community change.

#1

Social innovators and evaluators need ‘**data**’ for (at least) three tasks in community change efforts: discovery, design and feedback.

Example: Reducing Homelessness for Day Labourers in Surrey

1. What are the examples of ‘hard’ and ‘soft’ data or measurements in this story?

2. How was the different type of data used (for what purpose or decision)?

Project Comeback

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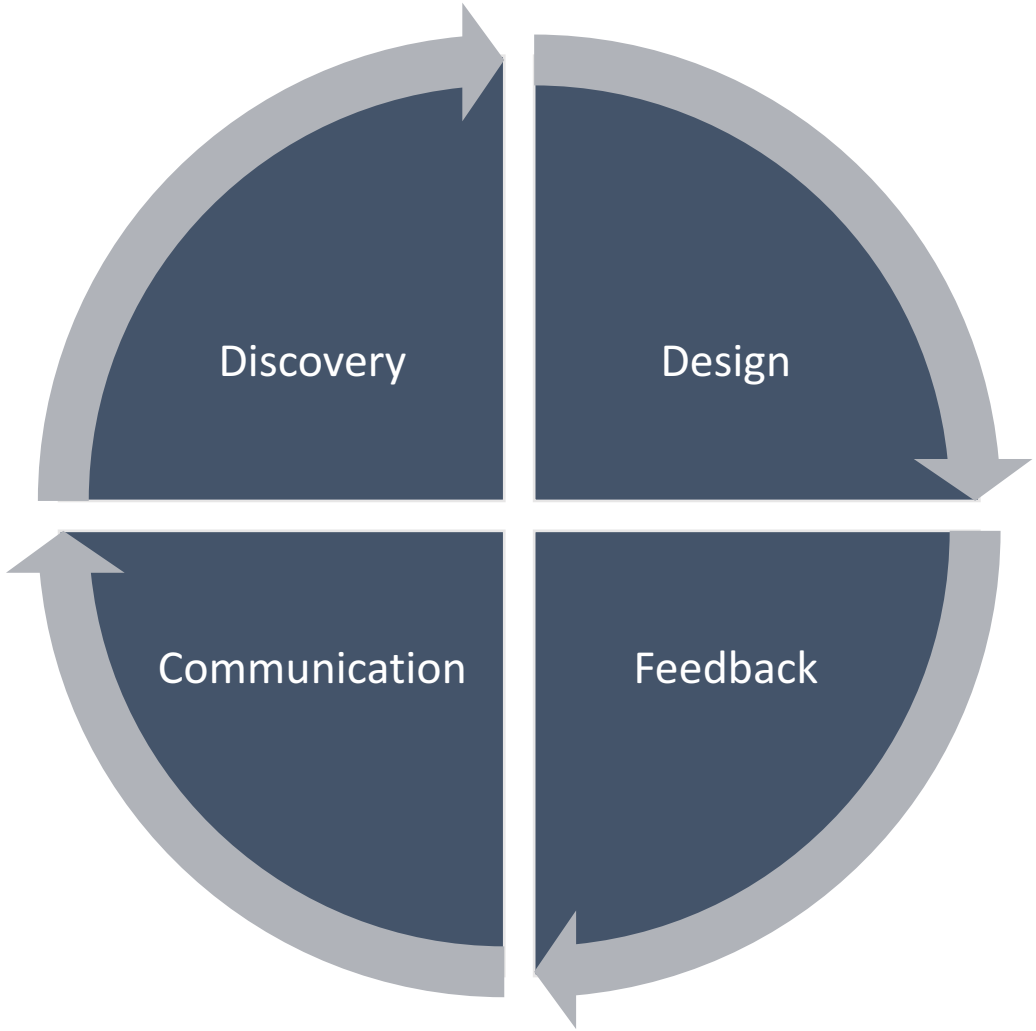
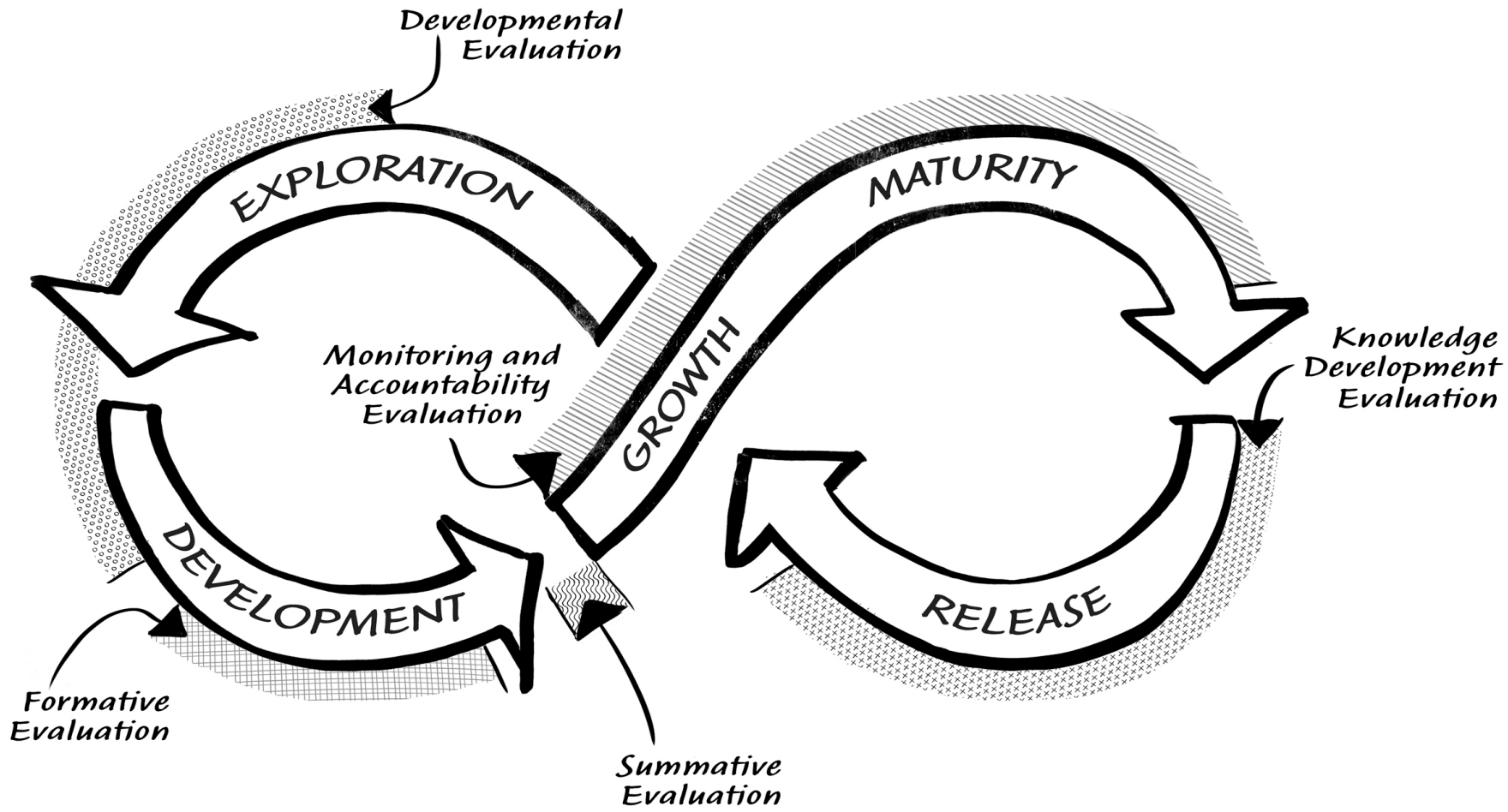
Four Ways to Use Data in Community Change



Adaptive Cycle



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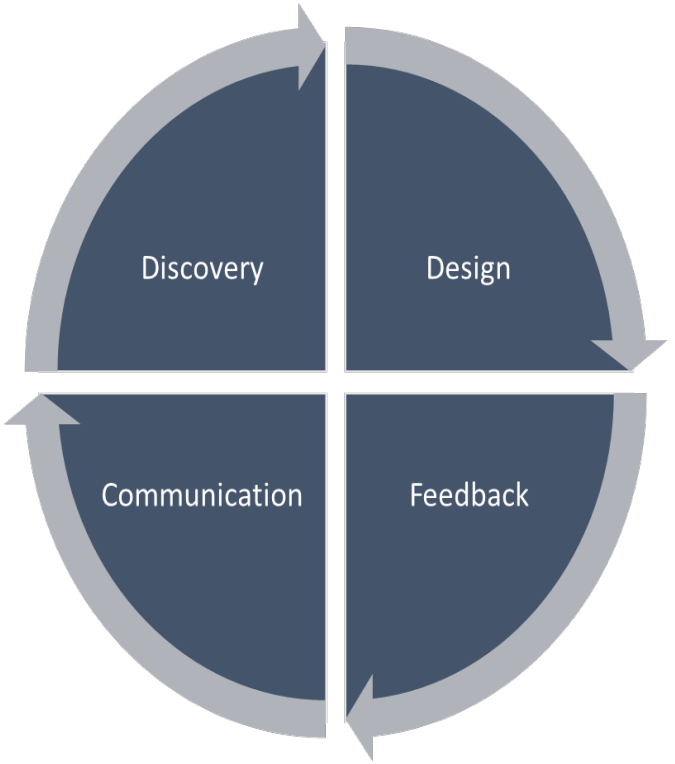
Where have you used ‘data’ and ‘measures’ in your community change work?



#2

There are two broad types of data – **quantitative & qualitative** – that can be employed in all four tasks.

Hard & Soft

	Quantitative	Qualitative
Focus	Quantity, Degrees	Quality
Methods	Statistics, Randomized Control Trials, Surveys, Polls	Interviews, Observation, Focus Groups
Communication	Tables, Charts, Percentages	Quotes, Vignettes, Case Studies, Media
Strengths	Breadth, Patterns, Trends	Depth, Nuance, Context
Limitations	Reductionist, Sample Sizes, Time & Expertise, Consistency	Generalizability, Representativeness, Time & Expertise
Rigor	Validity, Reliability	Trustworthy, credibility

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Quantitative Data: Challenge of Intepretation

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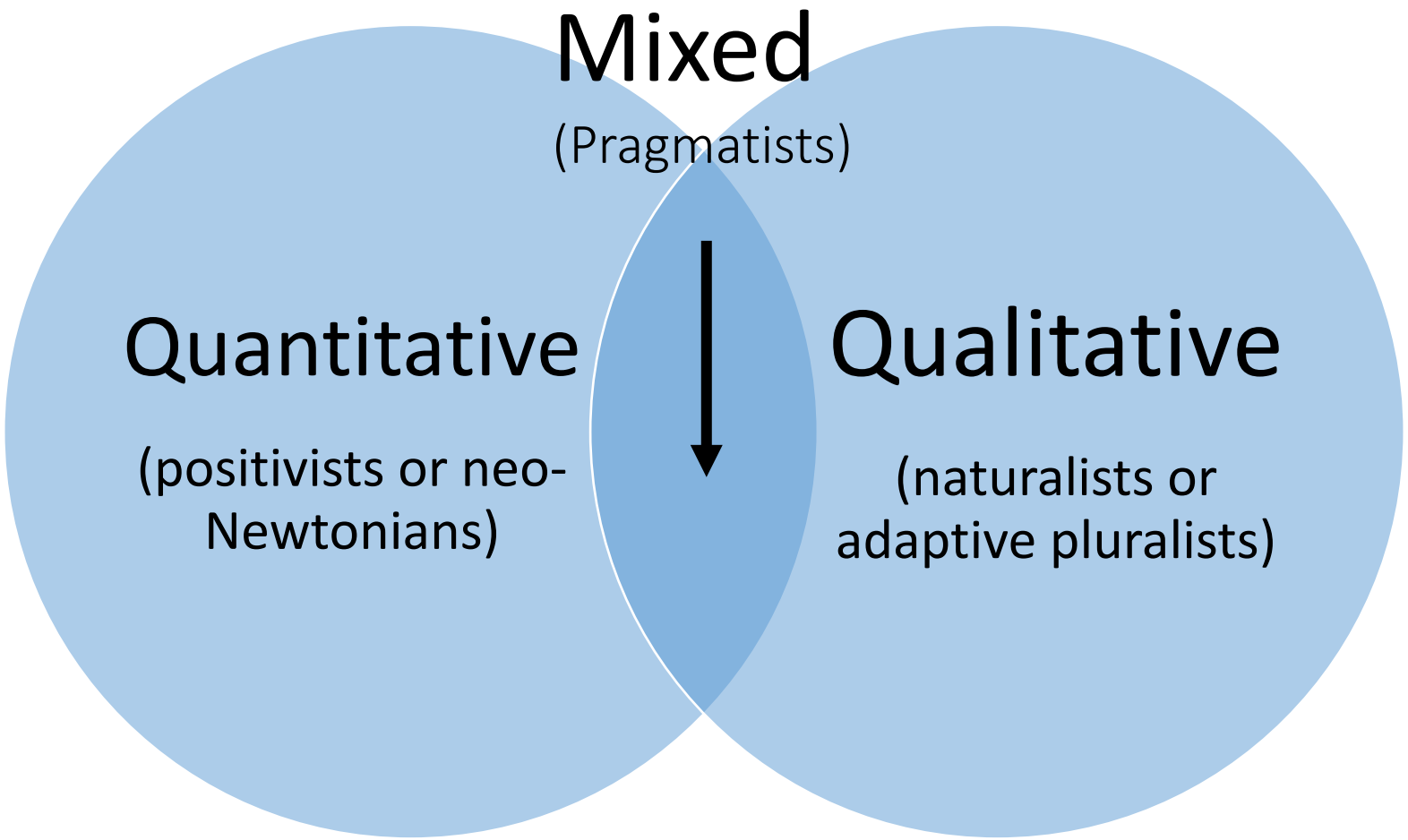
Do you have a bias towards on type of data or measurement over another? Why?

#3

We need to integrate both types of data in our work to be effective

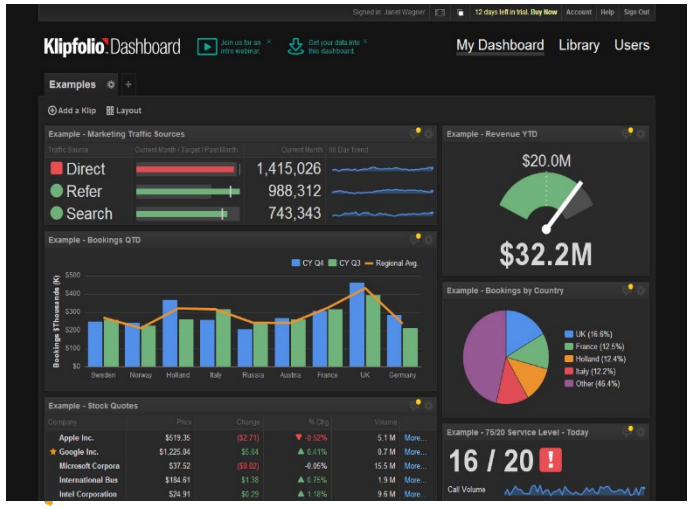
Integration



24/7 Service Delivery Model: Hard & Soft

Ethnographic research

External: Data Dashboard



Discovery

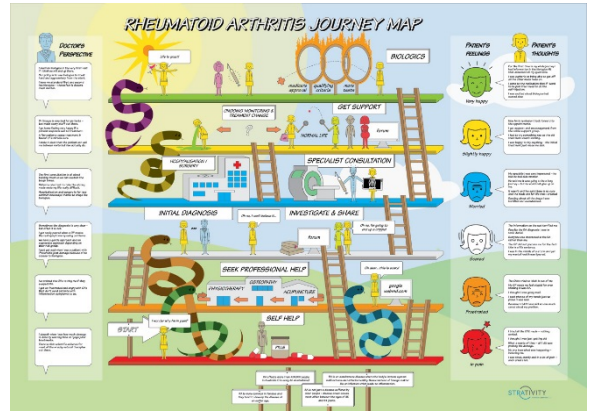
Design

Feedback

Communication

Stakeholder Feedback on Prototypes

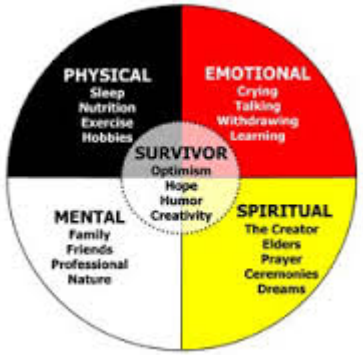
Internal: Use Cases/Journey Map



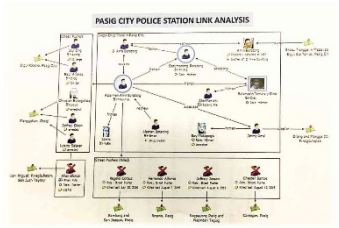
Mixing Hard & Soft in Communication

1. Before Vignette

2. The Intervention(s)

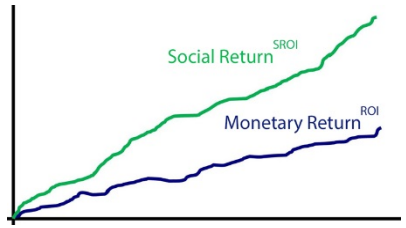


3. Before & After Quantitative Patterns



4. After Vignette

5. SROI



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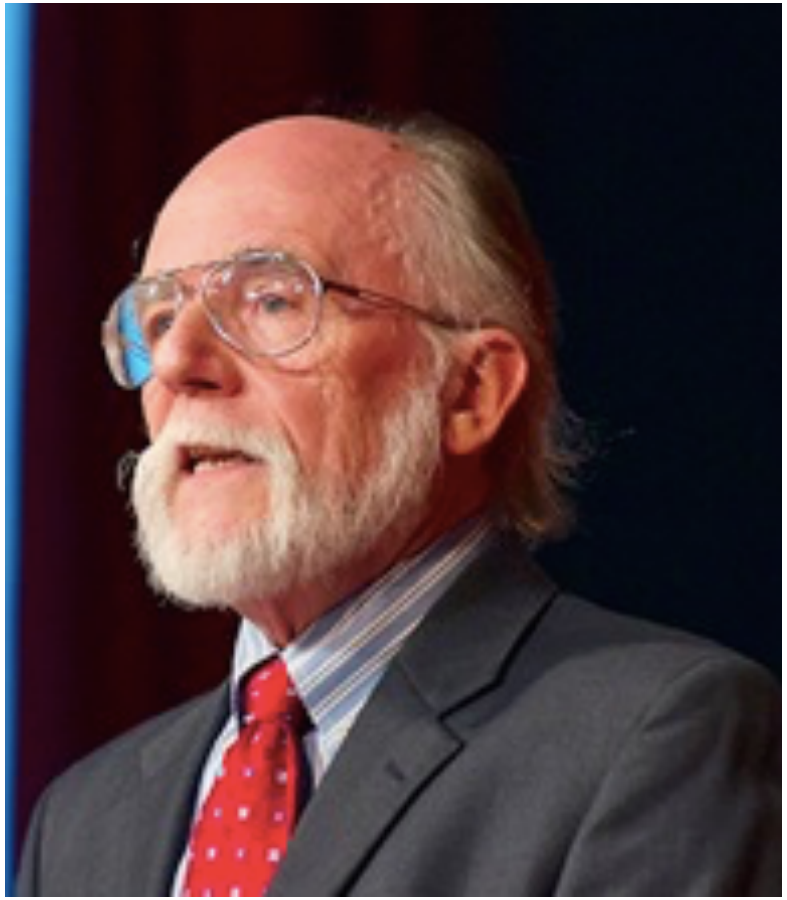
Questions – not measures or indicators – drive research, questions and evaluation.



Developing a User Profile
Aide for Action

Introduction

One of the central challenges of any evaluation is to get a strong grasp of what the primary user of the assessment want to explore and and how the evaluators can organize the evaluation so that its most useful for them.

The User Profile Worksheet and User Profile Card explore the primary users' questions, what kind of decision they will make with the answers to the questions, their preferences for how the assessment should b conducted, and when they need the evaluation feedback.

Here to There
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The Steps

1. Confirm the names, organization and role of the primary users of the evaluation.
2. Interview each primary user using the questions posed on the User Profile Worksheet
3. Compile their questions in a user profile format which the evaluation team can refer to when designing the evaluation scope of work and evaluation instruments.

User Profile Worksheet

Primary User	QUESTIONS: What are your evaluation questions?	USE: What kinds of decisions will you make with the answers to these questions? (See Tip 1)	PREFERENCES: What are your preferences for you how we design the evaluation or communicate its findings? (See Tip 2)	WINDOWS: When do you need the evaluation findings?
1.				
2.				
3.				
4.				
5.				

Tips

Examples of User Profile Cards

Hypothetical Wrap Around Project in Schools for At Risk Youth

NAME: Ralph Smith
ORGANIZATION: Community Foundation
ROLE: CEO

QUESTIONS:
1. To what extent is the program resulting in better outcomes for kids' grade three reading rate?
2. Do local schools really want this, or, are we forcing it on them?

USE:
- To determine if – and how much to extend the three year grant to project.
- To begin exploring the implications for scaling to new schools.

PREFERENCES
- Likes testimonials from students.
- Do not include Social Return on Investment Data – board had bad experiences it.
- Likes strong executive summary – rarely looks at full report.

WINDOWS
- Funding decisions at the end of June, so Foundation staff needs report by May 1.
- Would like to present results to local funders forum in September.

NAME: Mary Pickford
ORGANIZATION: Rydale High
ROLE: Principal

QUESTIONS:
1. Is this making a difference in the academic outcomes of kids, particularly in grade three literacy levels?
2. How much time is this project taking from teachers? Do they feel it helps or hinders their work?

USE:
- To sustain and expand support for the collaboration within the school staff and district leaders.

PREFERENCES
- Does not want academic metrics outside those already used by school - pleads that we don't spend time on new indicators.
- Would prefer a lunch hour focus group with teachers rather then surveys or interviews.

WINDOWS
- School planning takes place in late May so that they can send next year's plan to the District level for approval: they would like evaluation findings by late March if possible.
- Would like to present results to local funders forum in September.

NAME: Casey Finnigan
ORGANIZATION: Family Services Bureau
ROLE: Program Director

QUESTIONS:
1. What is working well and not well in our wrap around model with community agencies and staff? How can we improve it?
2. Will we be spread too thin to make our targets if we expand to another school?

USE:
- To improve the delivery model in the original pilot site.
- To begin exploring the implications for scaling to new schools.

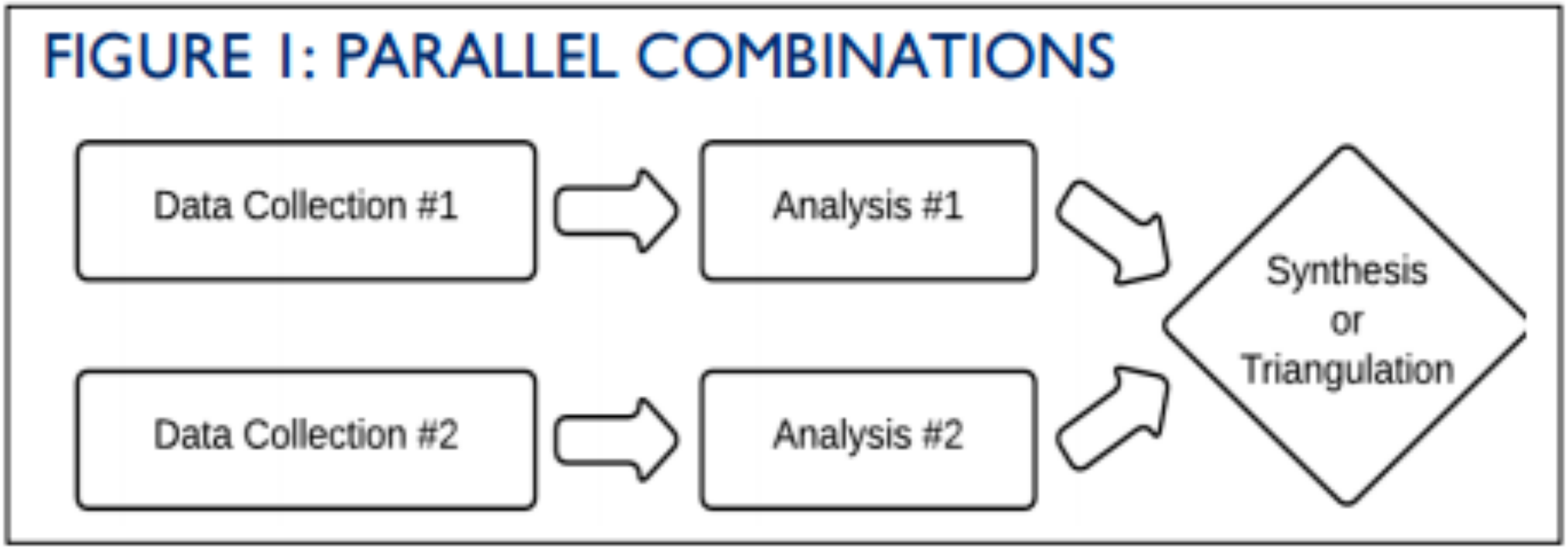
PREFERENCES
- Has had success using the Collaboration Factors Inventory as a self-assessment tool in past
- Wants evaluations findings first, and then a facilitated session where collaboration partners develop conclusions and recommendations together.

WINDOWS
- The collaboration members meet in April to do planning for the next year: its best to have results ready for this session.

#4

There are (at least) three types of mixed methods we can use to integrate both types of data.

Parallel Combination



Heavy Users in Edmonton: ethnographic research plus ETO

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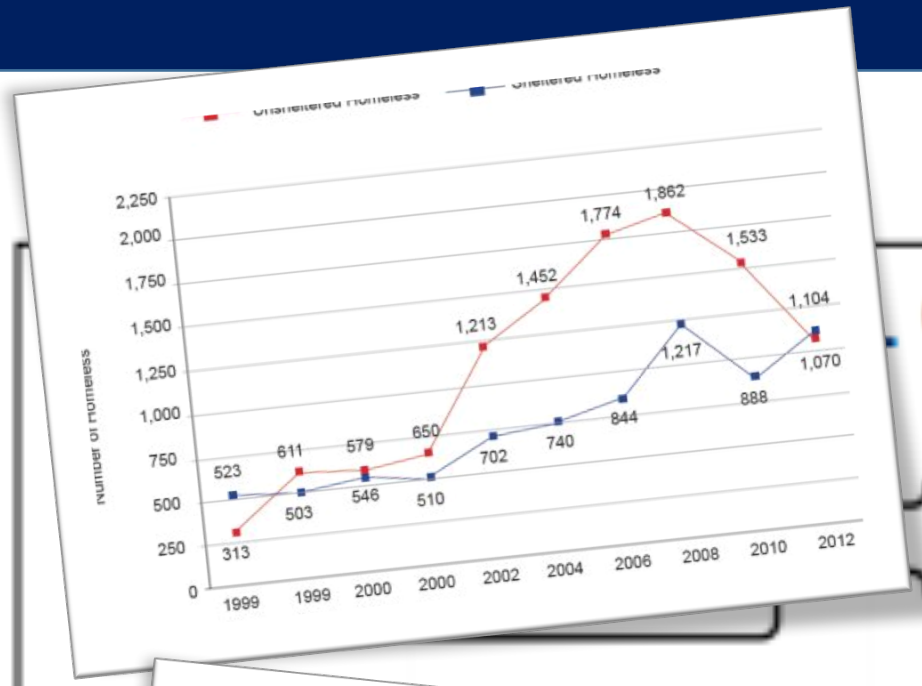
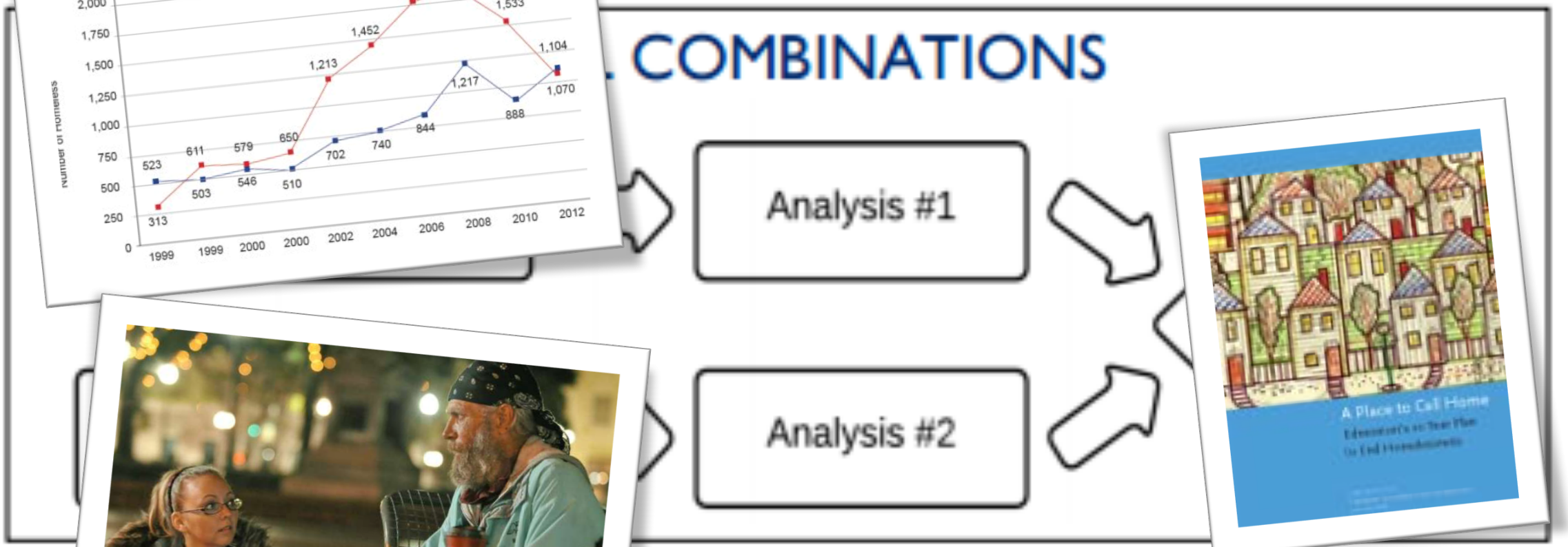
Edmonton Homelessness





Users in Edmonton: ethnographic research plus ETO

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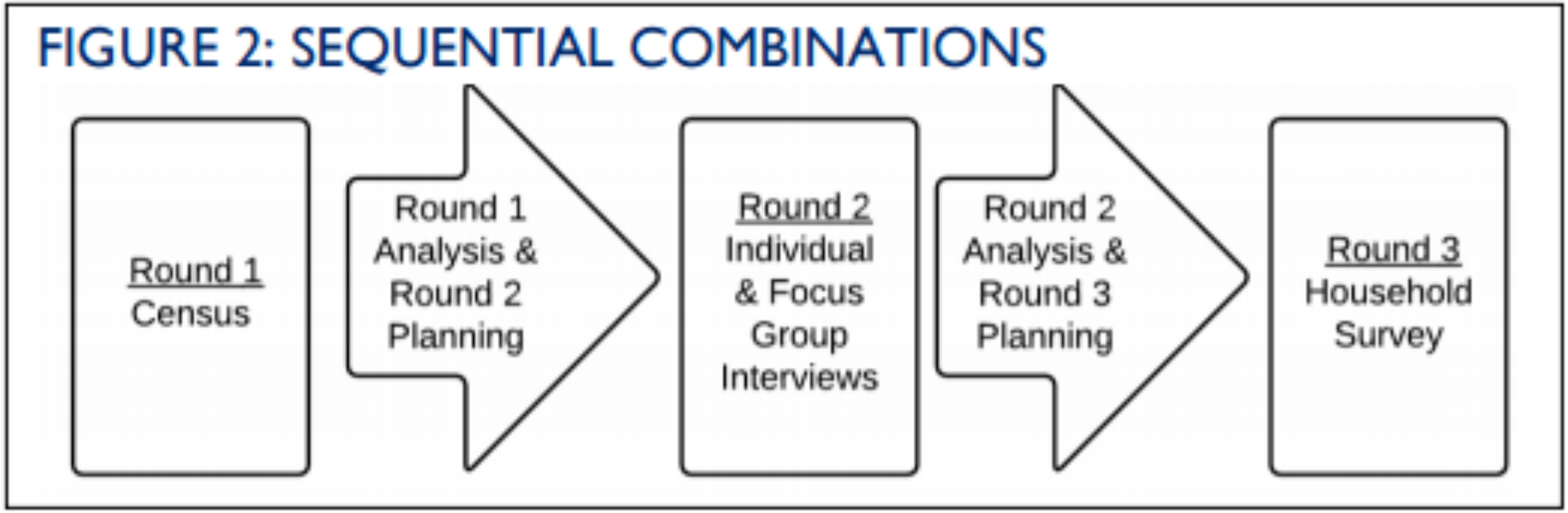
Sequential Combinations



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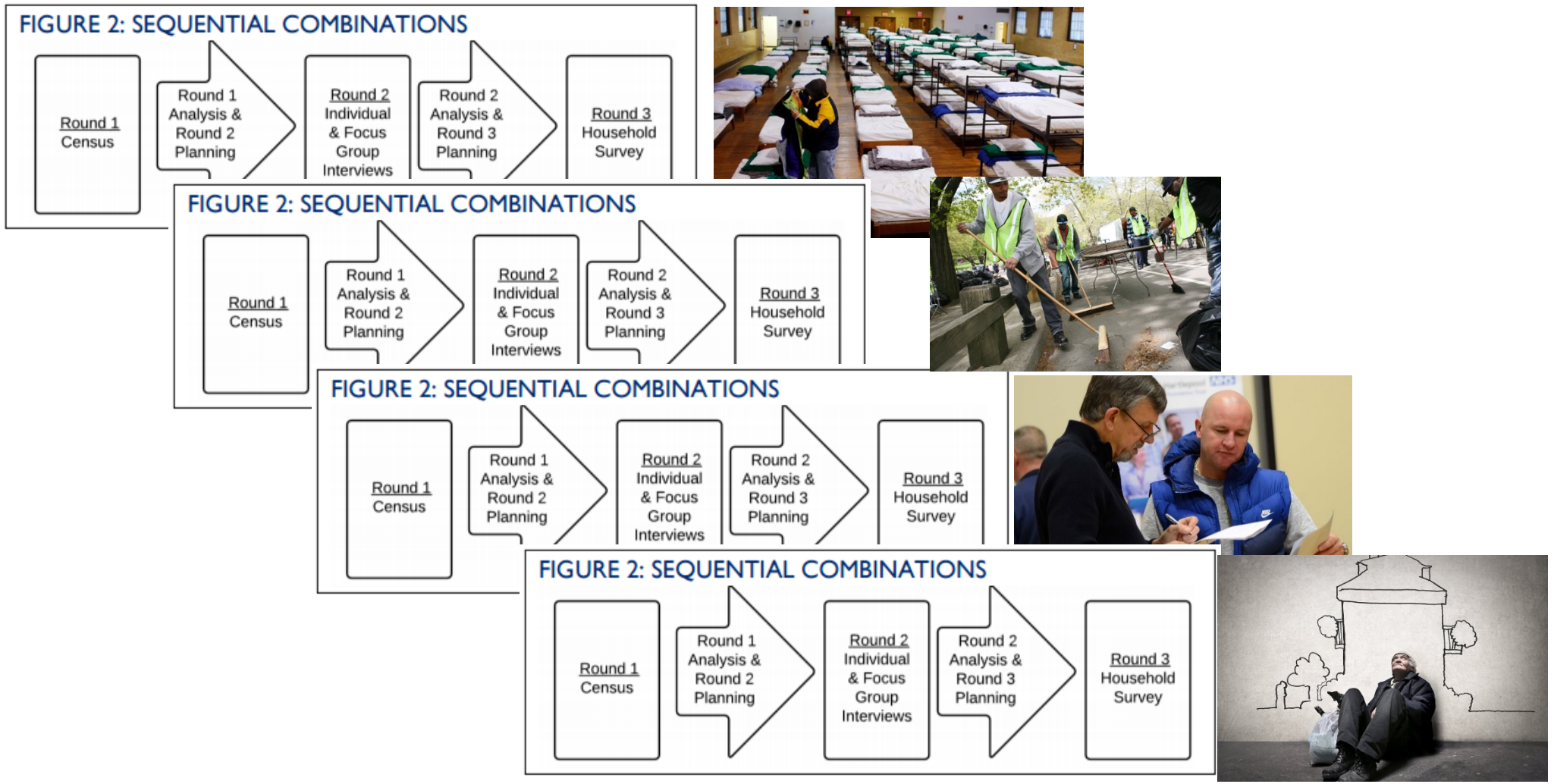
Project Comeback



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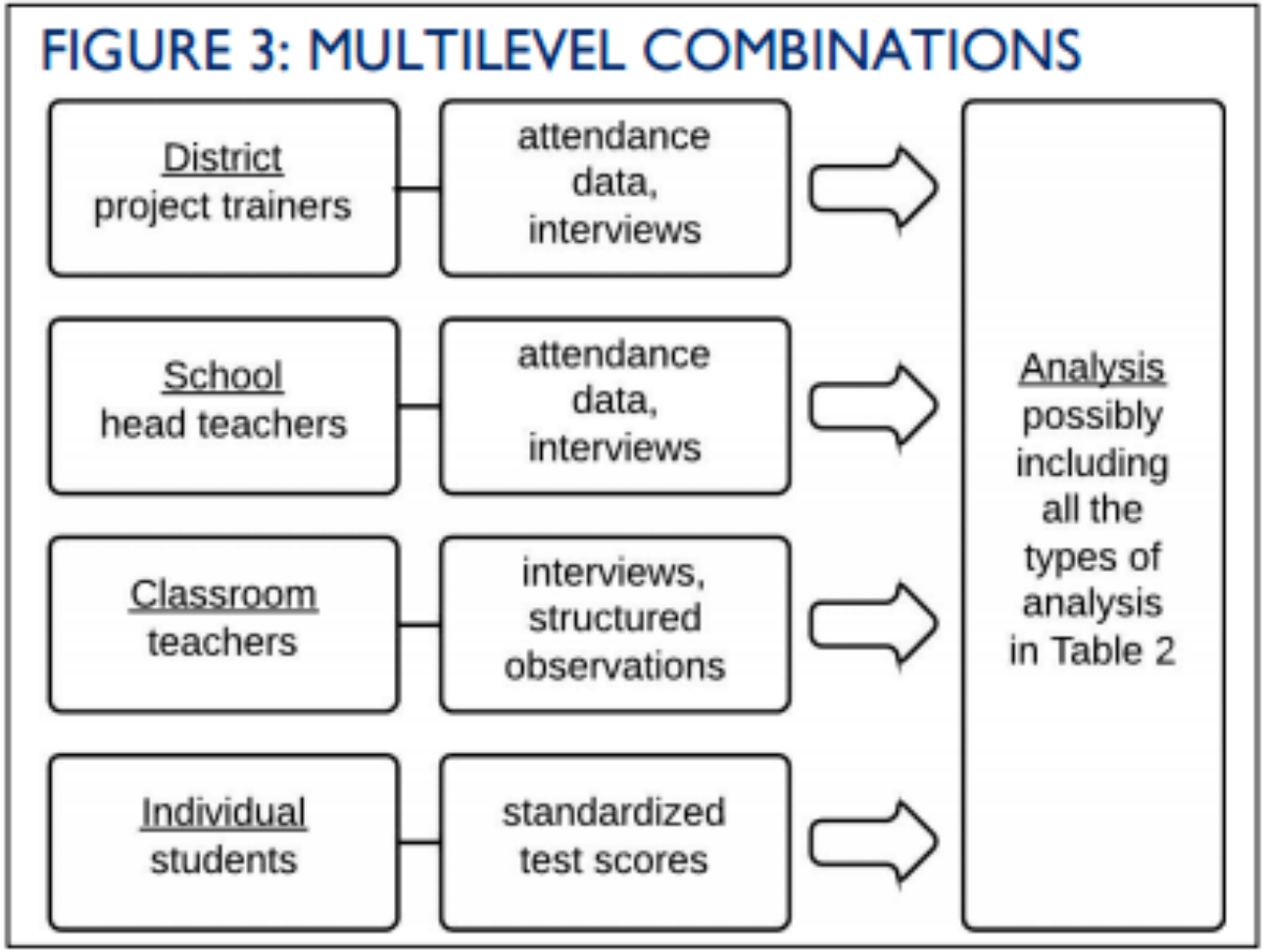
Multi-Level Combination



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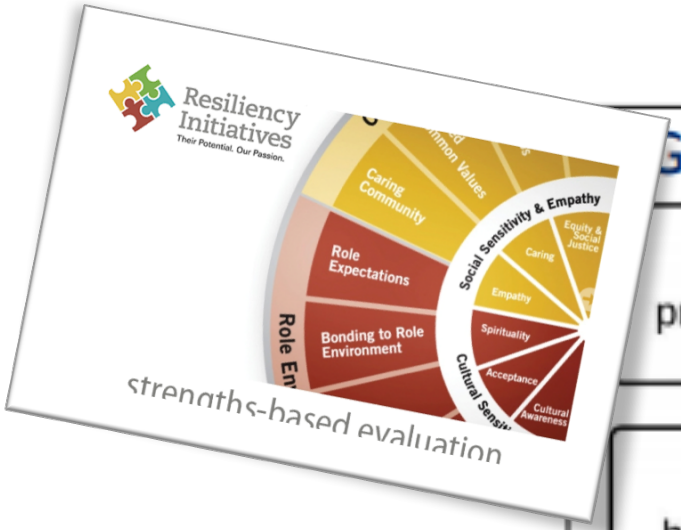
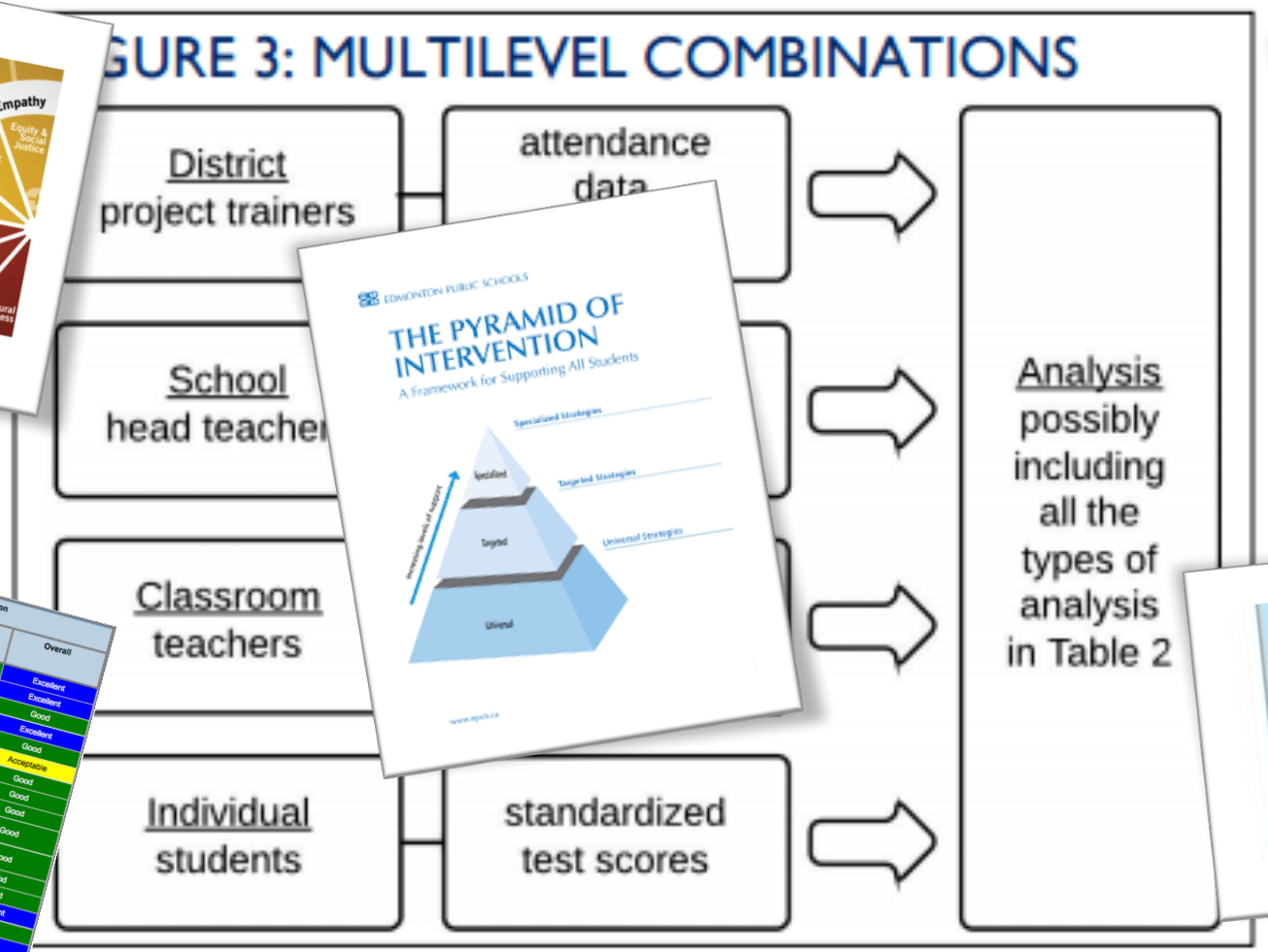
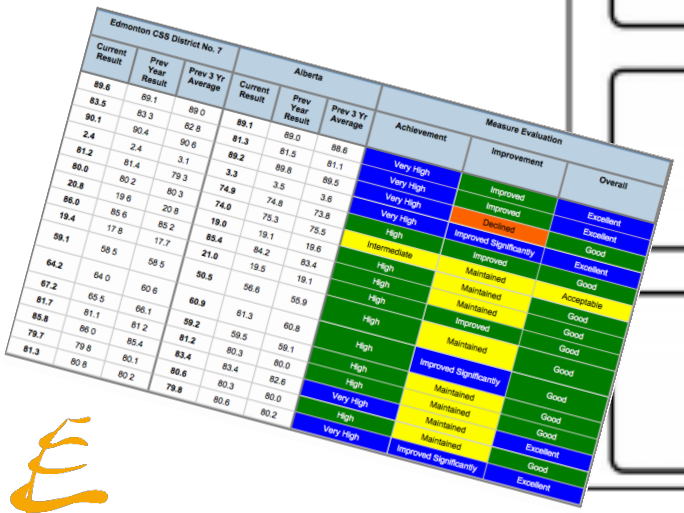
Multi-Level Combination







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An Example of an Integrated Method: Sense-Maker

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Have you used other here mixed method combinations not mentioned here?

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#5

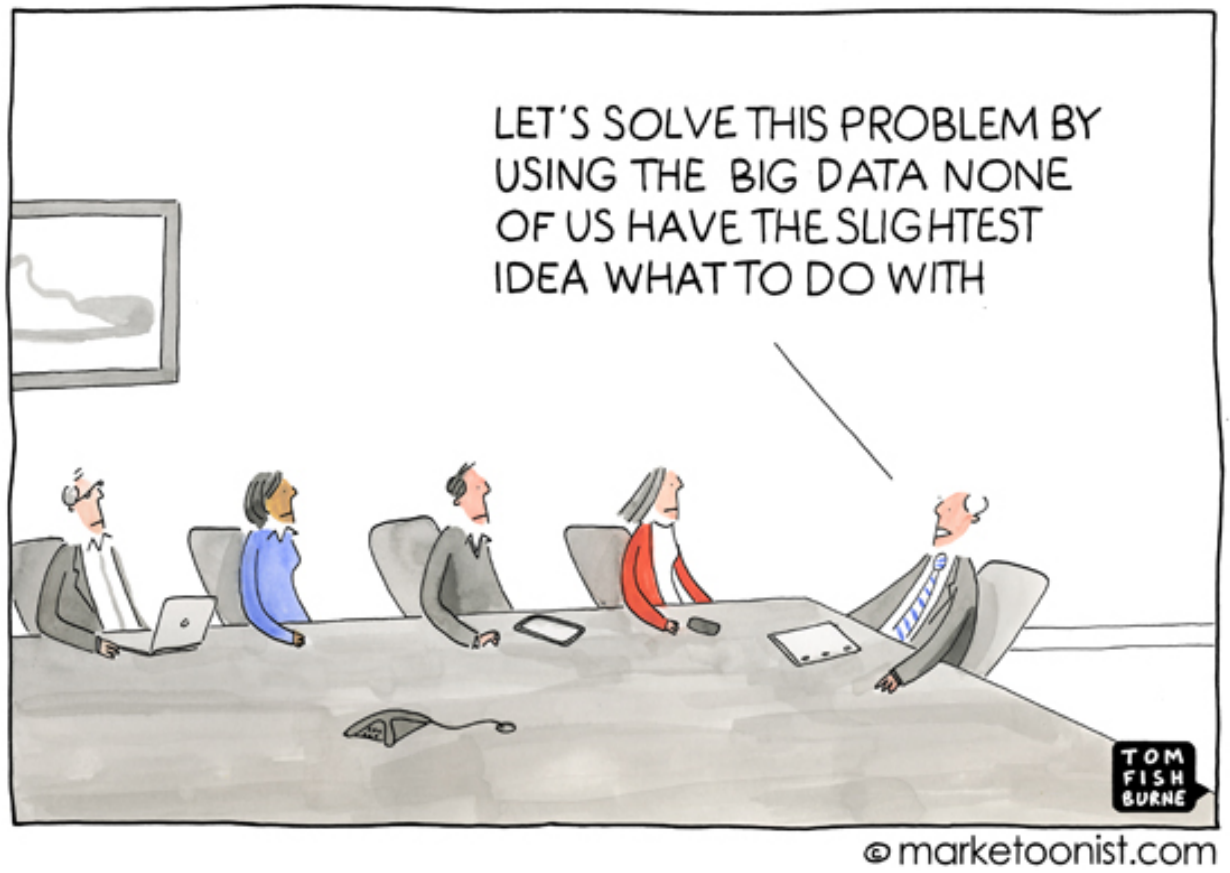
Measurement is an important part – **but only a part** – of strategic learning and management of community change.

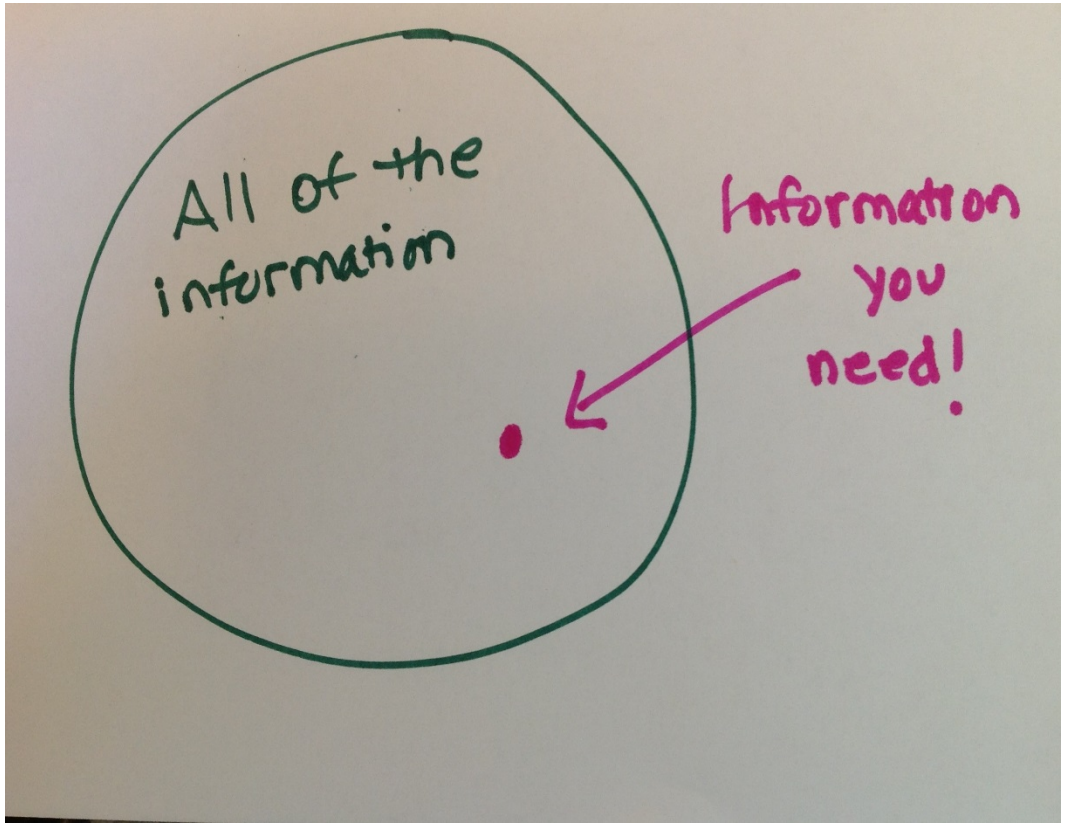
A Tale of Two Automotive Companies

GM: Measurement Heavy, Learning Light

Toyota: Learning Heavy, Measurement Light

Measurement Noise versus Signals





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If you can't measure it, you'd better manage it.

Wait, that's not it. It's supposed to be: "If you can't measure it, you can't manage it." This is sheer nonsense. If you believe it, get out of management before you do more harm. Or else read on.

Have you ever seen an acceptable measure of culture? Does that mean we can't manage culture, and so better get rid of it in our organizations? Measuring the market for a novel product is notoriously difficult. Must we get rid of novel products?

And who ever came up with a reliable measure for the performance of management? (Don't tell me that change in stock price does that.) Indeed, who ever even tried to measure the performance of measurement itself, beyond assuming it is wonderful? So out the window will have to go management and measurement too. We might as well all retire into our laptops.

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Mintzberg continued ….

- Someone I know once asked a most senior British civil servant why his department had to do so much measuring. His reply: “What else can we do when we don’t know what’s going on?” Did he ever try getting on the ground to find out what’s going on? And then using judgment to assess that? (Remember judgment? It’s still in the dictionary.)
- Measuring as a *replacement* for managing has done enormous damage—undermining the souls of so many of our institutions (as discussed in last week’s TWOG). Think of how much education has been killed by assuming that we can measure what a child learns in a classroom. (I defy anyone to measure learning. You are reading this TWOG: please measure what you are learning.) Must we always deflect teaching from engaging students to examining them?
- Health care has likewise suffered from this cult of obsessive measuring, and not only at the hands of governments. Insurance companies and HMOs, etc., as well as physicians obsessed with “evidence-based medicine”, have been just as guilty. And let’s not stop there. This “managing-it-by-measuring-it” has been destroying companies left and right. Amidst all the numbers, where are the new products, what’s the state of the culture?
- Measuring as a *complement* to managing is a fine idea: measure what you can; take seriously what you can’t; and manage both thoughtfully. In other words: If you can’t measure it, you’ll have to manage it. If you *can* measure it, you’ll especially have to manage it. Have we not had enough of leadership by remote control: sitting in executive offices and running the numbers—all that deeming and downsizing?

Strategic Learning

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Unfinished Business

1. Determining whether we contributed to outcomes or some other factors beyond our efforts (aka contribution analysis).

2. Processes for pattern recognition (aka finding signals amongst the noise).

3. Criteria for judging the value of change (e.g., at least five).

4. Drawing lessons learned (i.e., What is a high quality lesson learned).

5. Using data to inform decisions (i.e. most evaluations are not used).

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The Key Points

1. Social innovators and evaluators need '**data**' for (at least) three tasks in community change efforts: discovery, design and feedback.

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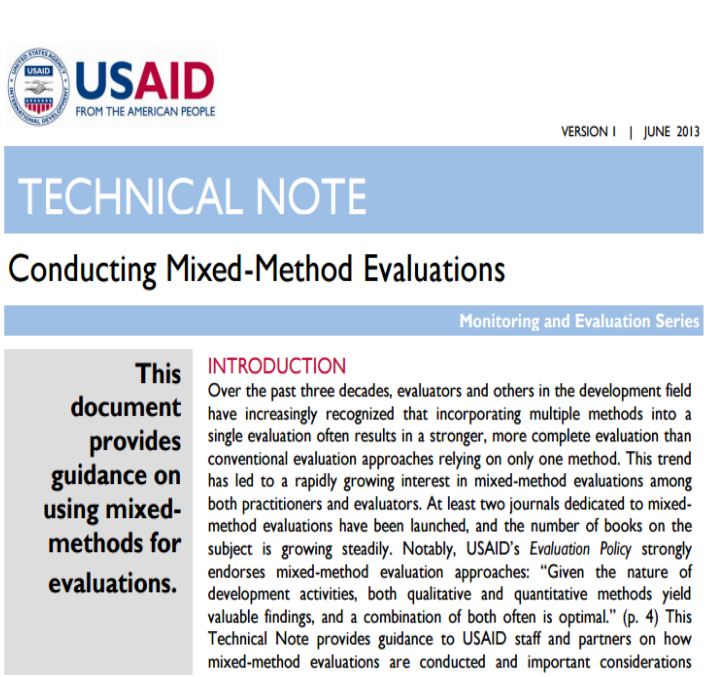
Want More?


USAID
FROM THE AMERICAN PEOPLE

VERSION 1 | JUNE 2013

TECHNICAL NOTE

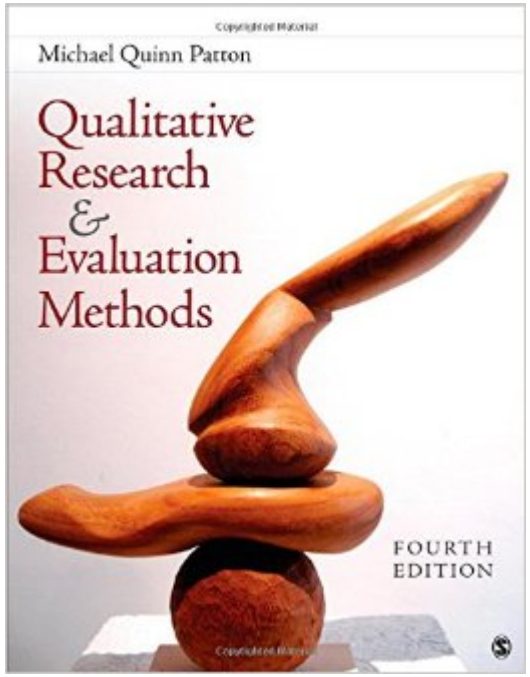
Conducting Mixed-Method Evaluations

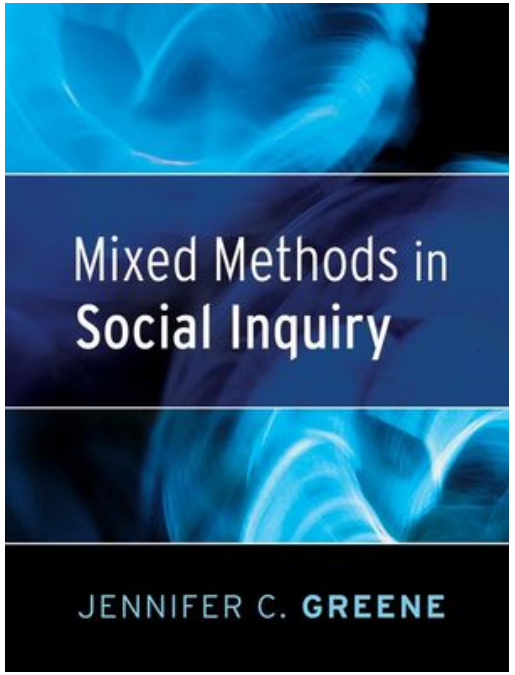
Monitoring and Evaluation Series

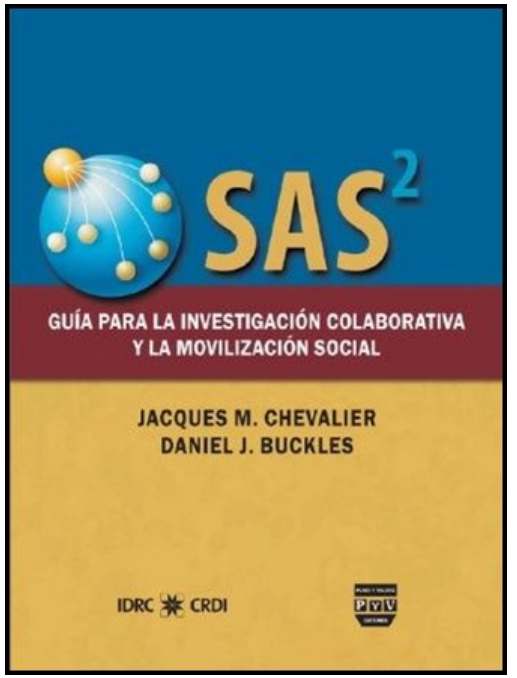
This document provides guidance on using mixed-methods for evaluations.

INTRODUCTION

Over the past three decades, evaluators and others in the development field have increasingly recognized that incorporating multiple methods into a single evaluation often results in a stronger, more complete evaluation than conventional evaluation approaches relying on only one method. This trend has led to a rapidly growing interest in mixed-method evaluations among both practitioners and evaluators. At least two journals dedicated to mixed-method evaluations have been launched, and the number of books on the subject is growing steadily. Notably, USAID's *Evaluation Policy* strongly endorses mixed-method evaluation approaches: "Given the nature of development activities, both qualitative and quantitative methods yield valuable findings, and a combination of both often is optimal." (p. 4) This Technical Note provides guidance to USAID staff and partners on how mixed-method evaluations are conducted and important considerations







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What is your biggest take away from this session?

What is your biggest question?

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