Mapping Upward

Stackable Credentials That Lead to Careers

Learning What Works

Data & Documentation in an Evidence-based World

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Evaluation. It doesn’t have to be this way.
Why Evaluation?

- To plan and launch effectively (formative, process)
- To improve (empowerment, participatory, collaborative, adaptive, action)
- To see if what you did worked (summative, outcome, impact)
- To find better ways to meet your needs (developmental, complexity, social innovation, network-centered)
Common Data Types

- Process documentation
- Activity-level data
- Outcome data
- Demographic data
- Experiential data (participants, employers, partners)
Evaluation Considerations

- Use what you have
- Gather what you need
- Document your practice

[Note: You may opt to contract out components of this work, but if you want to learn from it, engage in it.]
1. Use Ongoing Evaluation and Reporting
What do you have? How can you use it?

• Got a TAACCCT? Part of an ATE? Enlisted philanthropic friends?
  – Figure out what’s being collected, by whom, and whether it’s accessible
  – Join evaluation calls and webinars where relevant
  – Use this TA, other TA, and peers to identify approaches to getting existing information that will help you learn, scale
  – Review evaluation reports and materials from partner or parallel projects
  – *Influence* existing data collection practices where relevant
2. Gather what you need
Do you know what you need?
2. Are you clear about what you are doing and why?

- Logic model
- Theory of change
- Blank Canvas
- Strategic plan
Expectations

How  Change  Why
The Basics

Inputs  Activities  Outputs  Outcomes
Logic Model (draft)

Inputs (1) → Activities (2) → Outputs (3) → Outcomes (4)

- Shorter Term
- Longer Term

Impact (5)
**PURPOSE**
Clearly defined in terms of the social/environmental impact that is intended and any financial goals as well as any other key aspects of the vision. This will include the overarching problem/s that the venture will look to solve. This box is not really part of the canvas as it is not part of the business model that needs to be validated. This needs to be in place before starting on the rest of the canvas as it will serve as a set of guiding principles for the development of the business model.

**PROBLEM**
What are the biggest problems? Note these are specific problems faced by the customers (in customer segments) not the overarching problems that arise in the Purpose section.

**SOLUTION**
What solution will deliver the UVP/s to the different customer segments?

**UNIQUE VALUE PROPOSITION**
What single or multiple value propositions remove the problems faced by the different customer segments?

**UNFAIR ADVANTAGE**
Why will this venture succeed?

**CUSTOMER SEGMENTS**
Who do you need to move to make this business model work?
- Customers
- Users
- Investors/Funders
- Volunteers etc

**KEY METRICS**
What key numbers tell you whether your venture is succeeding?

**HIGH LEVEL CONCEPT**
A one-liner explaining what your organisation does.

**CHANNELS**
How will you reach your customers in a scalable way?

**EARLY ADOPTERS**
Which customers will move first?

**COST STRUCTURE**
How much will it cost to deliver your solution to customers at scale?

**FINANCIAL SUSTAINABILITY**
1. Traditional Revenue Model - ongoing income, e.g. customers paying for your product/service, ongoing donations etc.
2. Funding Model - individuals or organisations contributing initial capital (also include the ownership structure proposed for this venture)

**IMPACT**
What social or environmental impact will result and who are the beneficiaries? Including defined metrics for how these outcomes will be measured (these assumptions will be validated (and potentially pivoted on) like every other part of the business model).
Our Theories of Change

What is the problem you are trying to solve?

Who is your key audience?

What is your entry point to reaching your audience?

What steps are needed to bring about the change?

1.  
2.  
3.  

Measurable effects of your work?

Any wider benefits?

What could the world look like?

[Remember to think about individuals, groups & wider society.]

Dystopia Utopia
How will you measure what matters?

- Capture the essentials (highest level outcomes)
- Test the value of other indicators (process and outcome)
  - Build on existing systems
  - Experiment (until confident)
  - Count manually
  - Use debriefs to address measurement issues (test against use cases)
3. Document your practice
(Yea! The fun bit!)
What to Document

• Your Process (it matters more than you think—especially if you want to grow or scale)
  – Context
  – Meetings
  – Events
  – Materials and products
  – Successful ventures (and those less successful)
  – Anything that’s hard to explain

• Participant/Stakeholder Experience & Impact
Get Creative
Methods

- Write, record, photograph, video, publish/share
- Capture perspectives of individuals and groups
- Share and reflect (graphic recording?)
- Use multimedia (yes, social, too)
Crowd Favorites

Bryan Albrecht @AlbrechtBryan - 1h
We bring training to you @gatewaytech

Wis Tech Colleges @WisTechColleges - Jul 19
Very nice! Might you consider lending it out?
cc: @KyleSchwarm

Bryan Albrecht @AlbrechtBryan
Gateway launches new training vehicle. @gatewaytech
To Recap...

- Find out what you have/can access
- Gather what you need (even informally)
- Document your practice (you’ll be glad you did, we promise)
And, of course, analyze & course correct.
Reflection/Debrief

• Assign responsibility for reflection/debrief process
• Conduct the process as a group/team
• Take actions as needed (and stop collecting data that does not matter)
A word about external
Evaluation. It doesn’t have to be this way.
Thank you