With These Methods,
Time is On Our Side. Yes It Is!

What Do We Want? Data!
When Do We Want It? Now!

Julia Coffman
Center for Evaluation Innovation

Ehren Reed
Innovation Network, Inc.

American Evaluation Association
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Three Questions

❶ **What defines real-time evaluation?**

❷ **What are rapid response methods?**

❸ **What rapid response methods are unique to advocacy evaluation?**

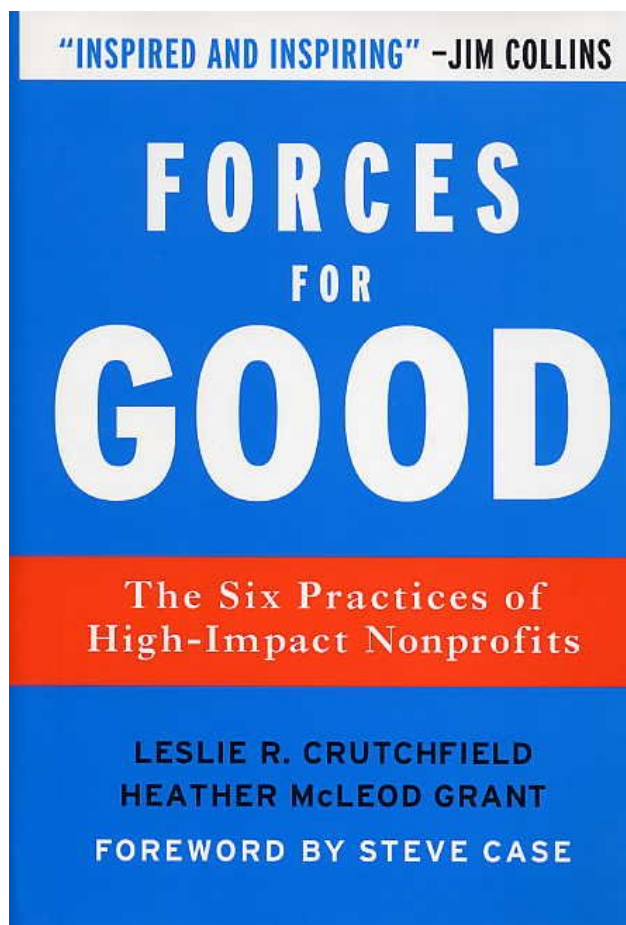# ❶ What defines real-time evaluation?

Evaluation has a seat at the strategy table.

Communications

Finance

Strategy

Evaluation

Programs

Government Relations
& Legal Affairs

Development

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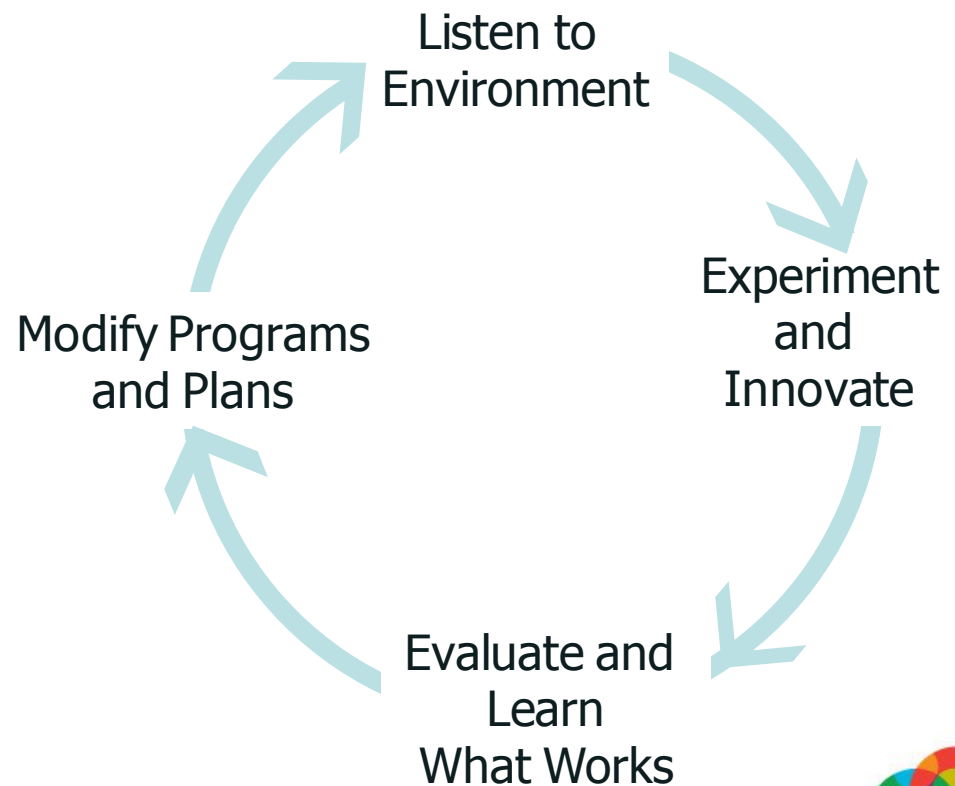
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Evaluation is used for learning (not just accountability).

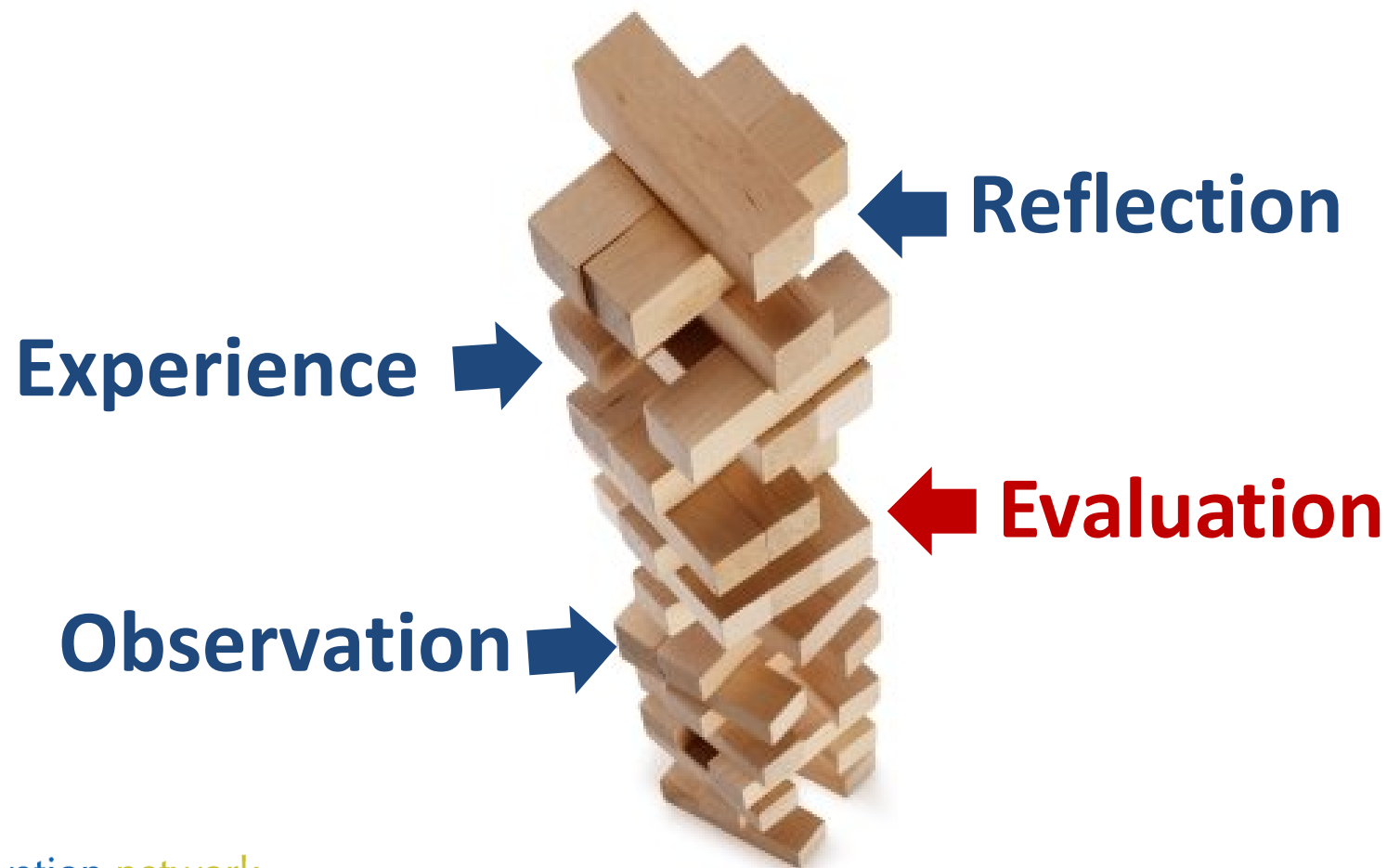# Evaluation takes place within a culture encouraging of risk taking and learning.

Cycle of Adaptation

- Listen to Environment
- Experiment and Innovate
- Evaluate and Learn What Works
- Modify Programs and Plans

Evaluation is integrated or embedded.

Evaluation supports strategy, but is not wholly responsible for it.

Reflection

Experience

Evaluation

Observation

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Understanding exists that this approach requires time and resources.

- Adaptable

- "On call"

- Responsive

- Involved

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Evaluation adapts and responds rapidly.

❷ What are rapid response methods?

Research Panels

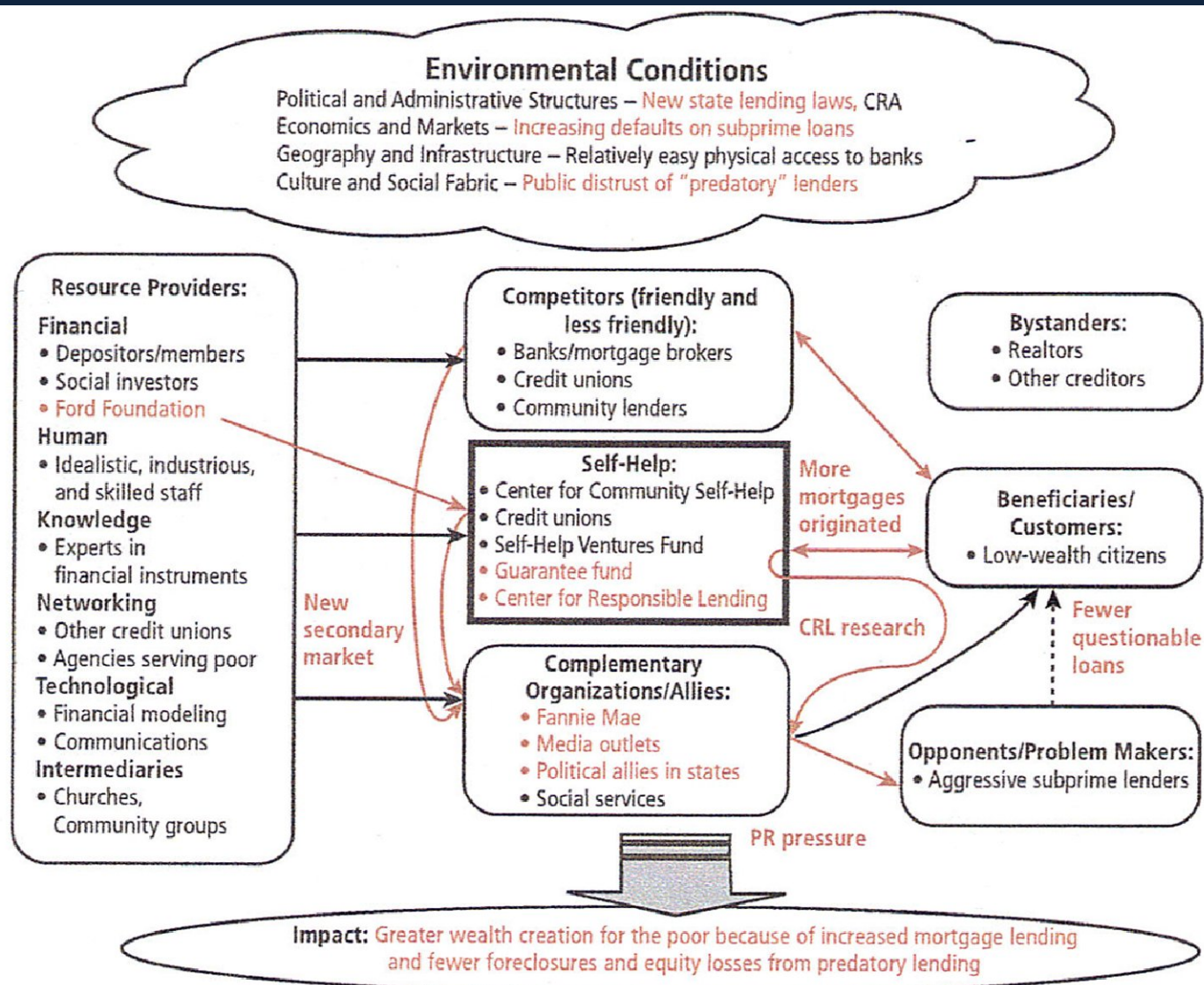- Online, Phone, or In Person
- Custom or Standard

Snapshot Surveys

Snapshot Survey Example: Policymaker Meetings

Your name/ID #:			
Date of meeting: [date field]	**Name of policy maker:**	**Party Affiliation:** ☐ Democrat ☐ Republican ☐ **Other**	**Category of policy maker:** ☐ State Assembly Member ☐ State Senator ☐ State Judiciary

Please rate the contact's support for the issue area discussed [1=strongly supports; 2=mildly supports; 3= neutral; 4= mildly opposes; 5= strongly opposes]

1   2   3   4   5   **I don't know**

Primary topic(s) discussed:

a.

b.

c.

d.

Did the policy maker promise to take a specific action as a result of the meeting?
Yes / No

If yes, please describe the specific actions pledged by target:

If yes, please rate the promised action(s): [1=minor action (e.g., target will read materials); 5=major action (e.g., target will submit and champion a bill)]
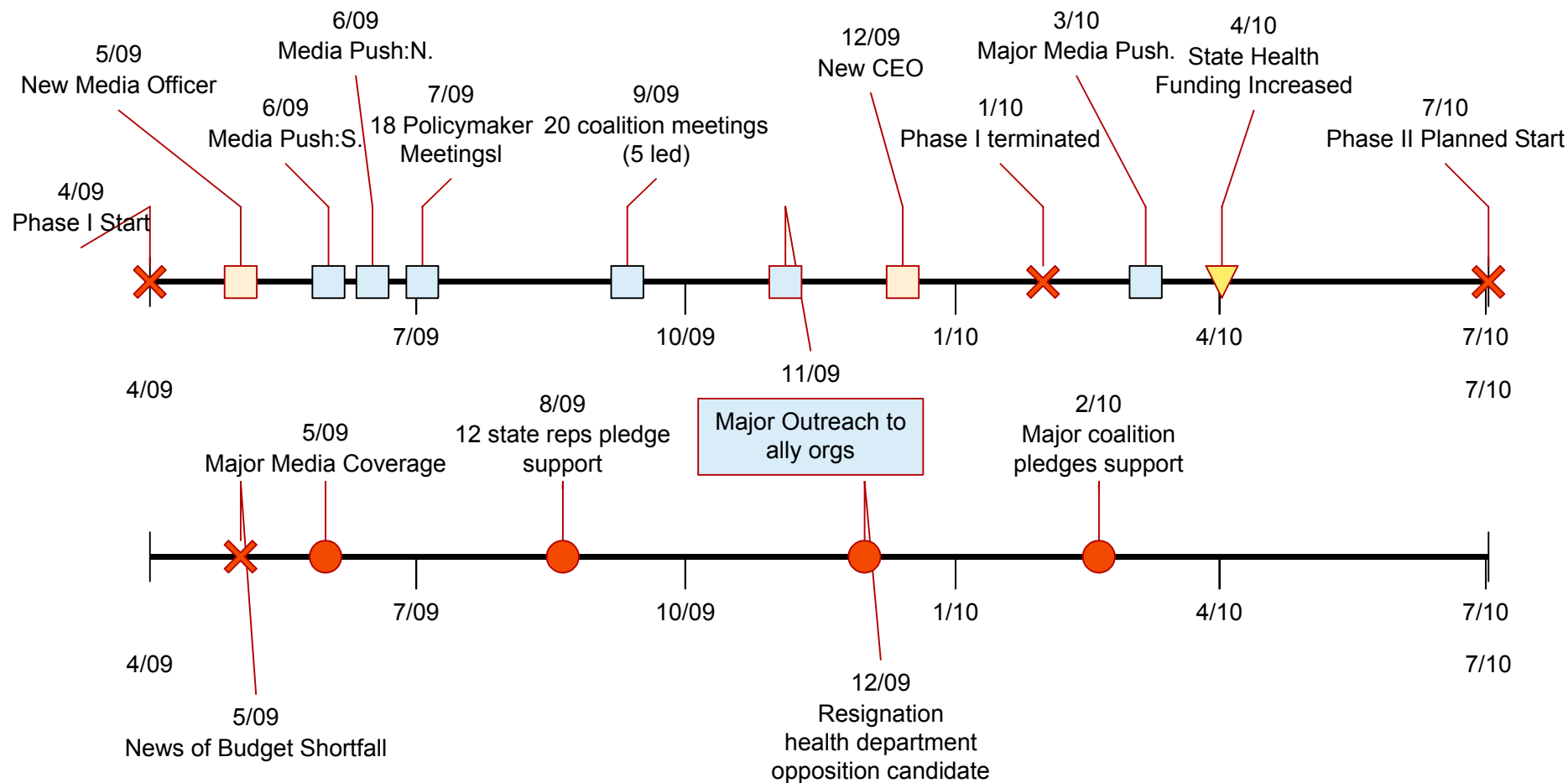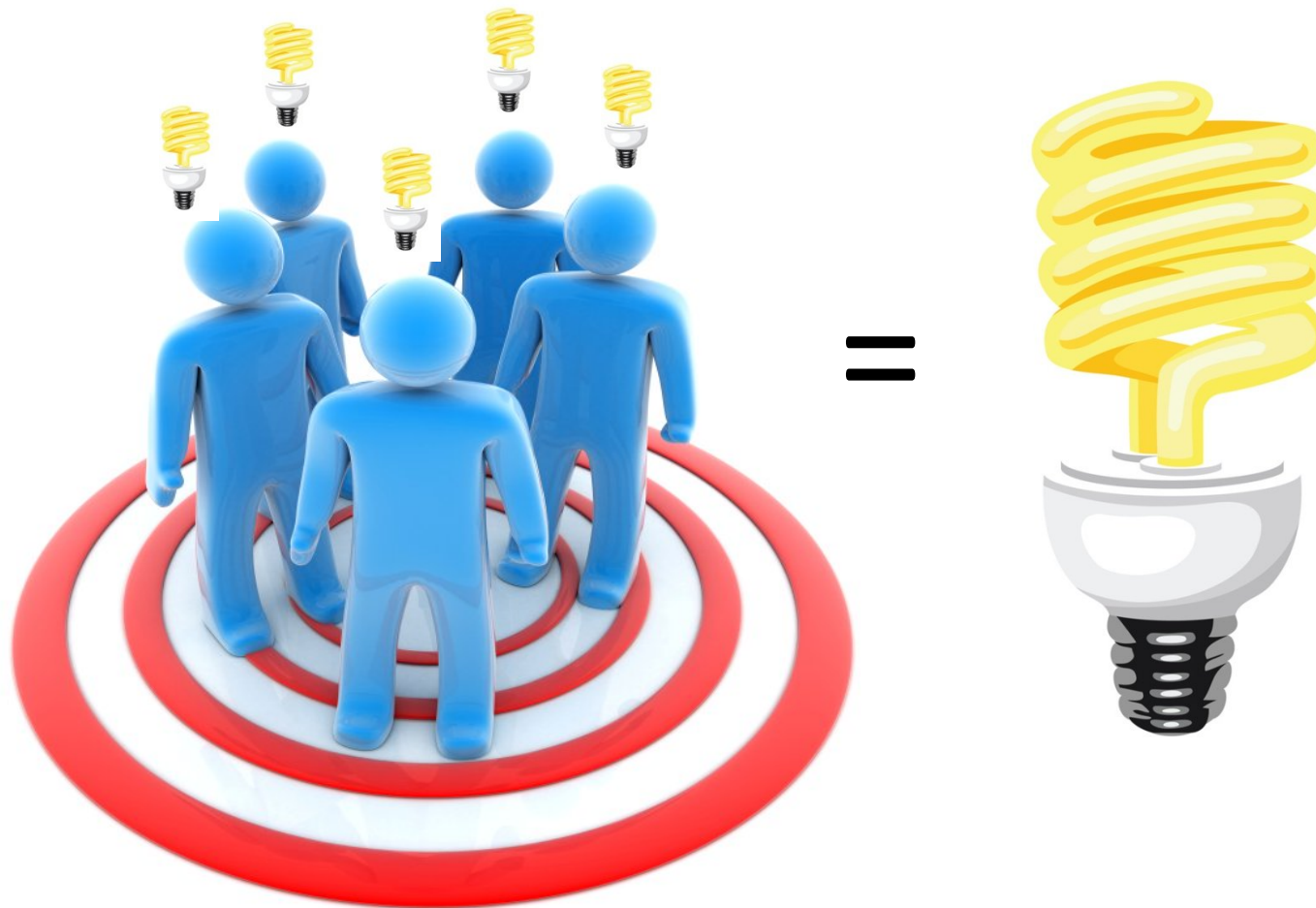
1   2   3   4   5

Intercept Interviews

System Mapping

Environmental Conditions
Political and Administrative Structures – New state lending laws, CRA
Economics and Markets – Increasing defaults on subprime loans
Geography and Infrastructure – Relatively easy physical access to banks
Culture and Social Fabric – Public distrust of "predatory" lenders

Resource Providers:

Financial
• Depositors/members
• Social investors
• Ford Foundation
Human
• Idealistic, industrious, and skilled staff
Knowledge
• Experts in financial instruments
Networking
• Other credit unions
• Agencies serving poor
Technological
• Financial modeling
• Communications
Intermediaries
• Churches, Community groups

Competitors (friendly and less friendly):
• Banks/mortgage brokers
• Credit unions
• Community lenders

Bystanders:
• Realtors
• Other creditors

Self-Help:
• Center for Community Self-Help
• Credit unions
• Self-Help Ventures Fund
• Guarantee fund
• Center for Responsible Lending

More mortgages originated

Beneficiaries/Customers:
• Low-wealth citizens

New secondary market

CRL research

Fewer questionable loans

Complementary Organizations/Allies:
• Fannie Mae
• Media outlets
• Political allies in states
• Social services

Opponents/Problem Makers:
• Aggressive subprime lenders

PR pressure

Impact: Greater wealth creation for the poor because of increased mortgage lending and fewer foreclosures and equity losses from predatory lending

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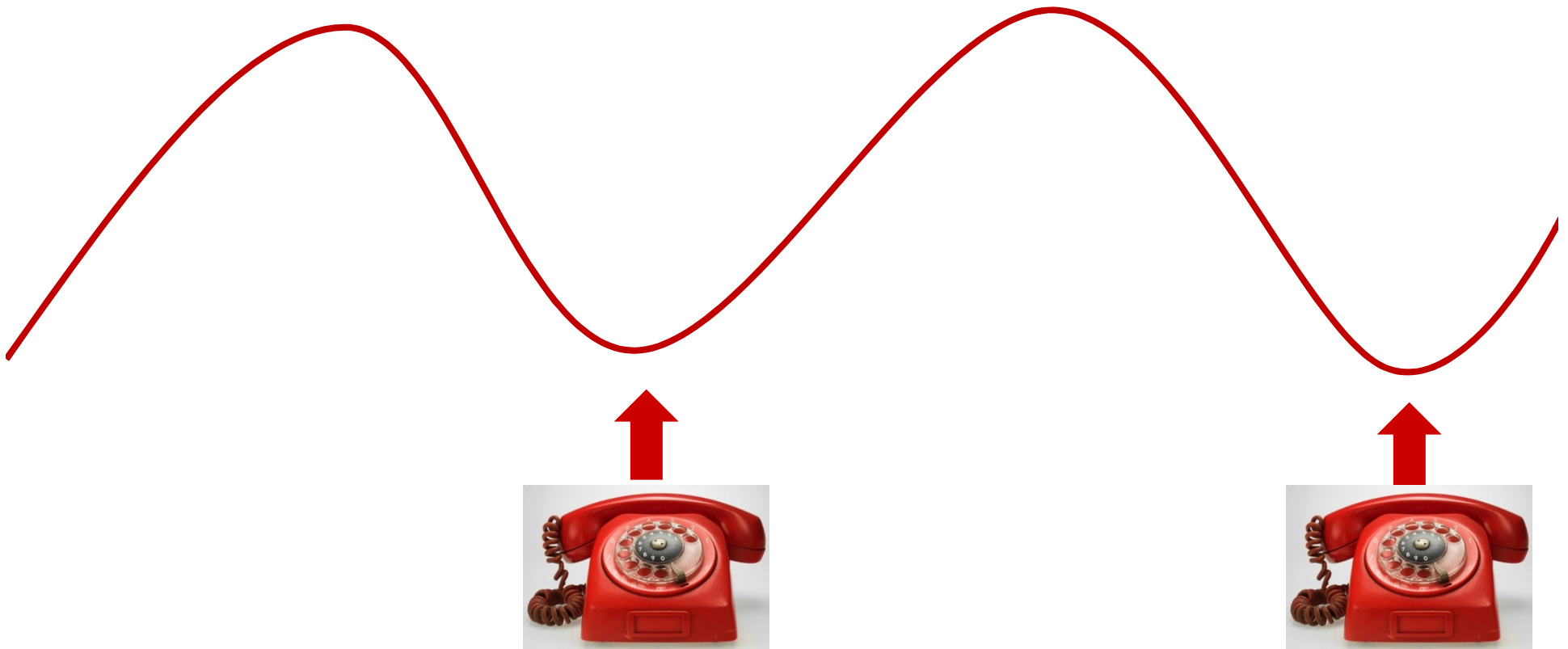
Critical Incident Timelines

Crowdsourcing

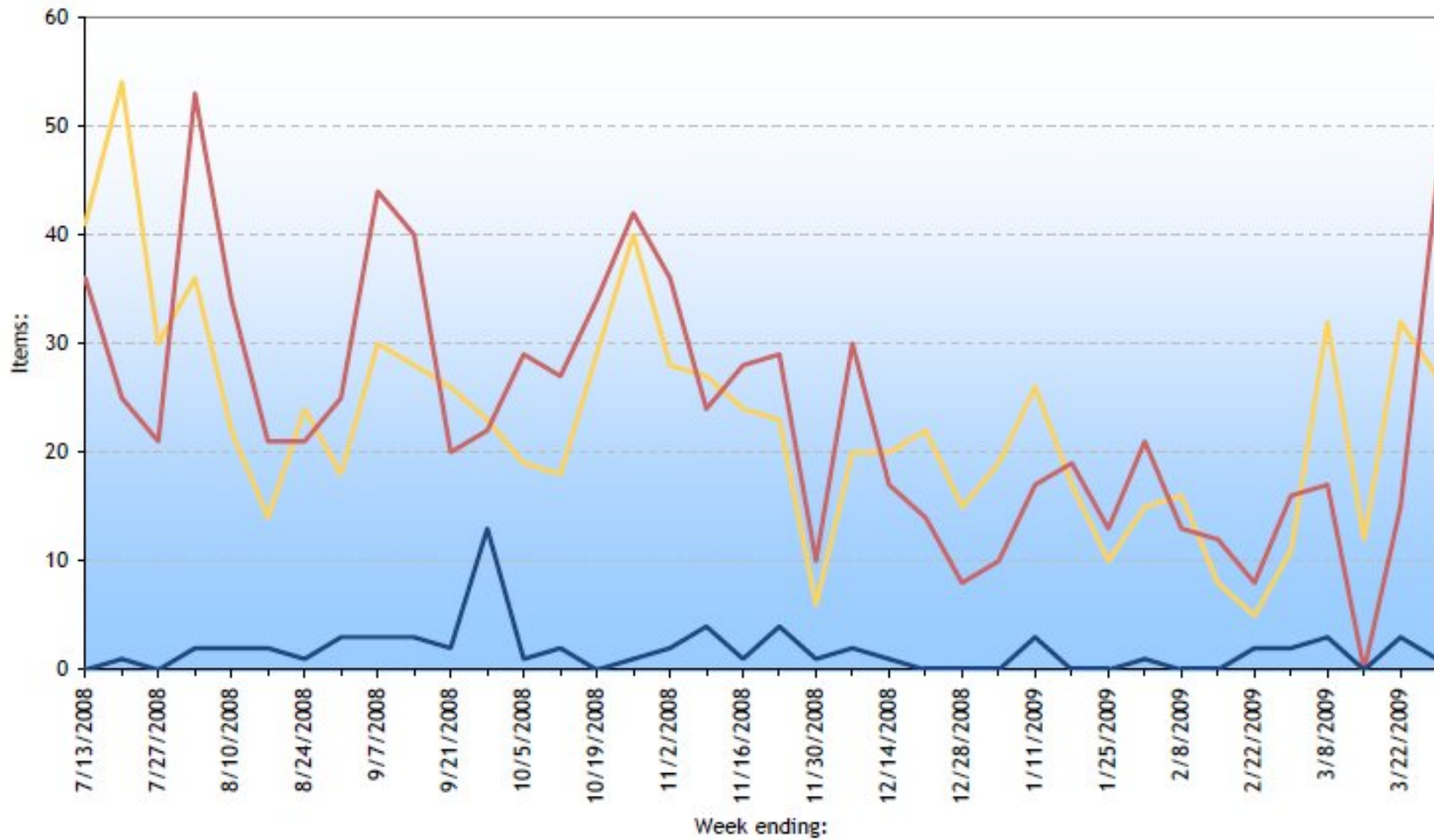❸ **What rapid response methods are unique to advocacy evaluation?**

Intense Period Debriefs

Media Scorecards

Champion Tracking

Bellwether Methodology

Bellwethers are:

"Influentials" in the public and private sectors whose positions require that they are politically informed and that they track a broad range of policy issues

► Policymakers

► Administrators

► Media

► Advocates

► Funders

► Business

► Associations

Real-Time Means:

At the right time, not just frequently.

Being integrated and flexible.

Using rapid methods that are quick to design, implement, and analyze.

Returning data that are responsive and useful for learning.