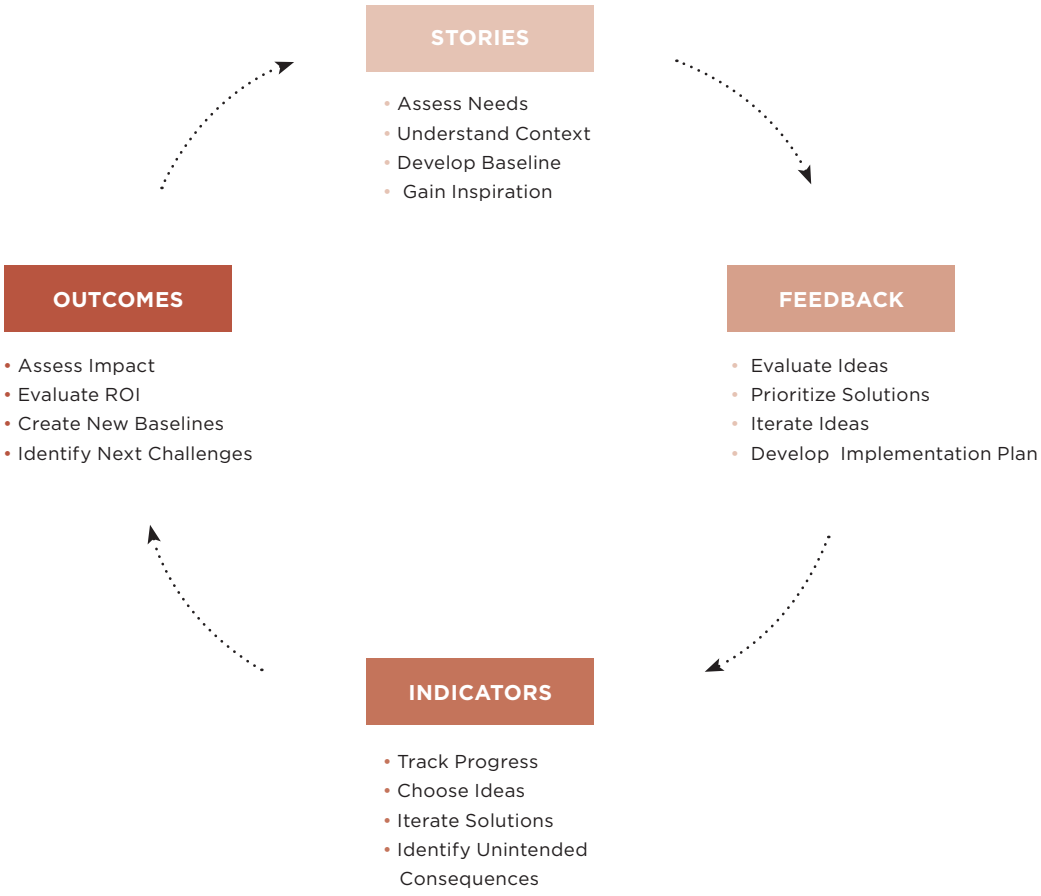


THE LEARNING LOOP

Stories, feedback, indicators, and outcomes are all ways of gathering empirical data in order to learn. A project in India for clean water storage and transportation utilized all of these methods to measure the impact potential and outcomes of solutions.

STEP 6

METHOD: TRACK INDICATORS

Indicators help you measure the effects of your solutions. These effects can be positive or negative. They can also be intended or unintended.

Facilitator Notes

Time:
2-3 Hours

Difficulty:
★★★★☆

Step 1. Ask the team to refer back to the Theory of Change and to your holistic impact assessment stakeholder map.

Step 2. Focus on each stakeholder and/or step and for each one, list the information you would like to learn. For example, if the solution is focused on increasing women's income opportunities and the men in the community are a stakeholder, you might want to know how the solution is affecting the incomes and time allocations of both men and women.

Step 3. For each stakeholder and/or step, ask: Are there leading indicators we should be tracking? Are there analogous indicators we can track? How can we measure awareness and engagement? How will we track and understand the dynamics of transformations that are occurring?

Step 4. If possible, include constituents and other stakeholders directly in this process.

TYPES OF INDICATORS

Leading
The impact of solutions can often take some time to become evident, such as months or years. In these cases, it makes sense to track leading indicators. For example, if your goal is to reduce the number of unwanted pregnancies (an effect that will take at least nine months to see), a leading indicator would be adherence to birth control. If your goal is to increase farmer income, a leading indicator would be the number of farmers growing high-value crops this season.

Analogous
Sometimes it is difficult to see direct impacts. This is especially true when your design challenge is about trust or prevention. In these cases, try to find an indicator that would logically lead you to conclude whether your goal is being met. For example, on a project to increase trust of healthcare providers, the team tracked the number of questions people asked doctors and nurses. Since trust is hard to measure, the team decided to use the posing of questions as an analogous indicator of trust.

Awareness
When the goal involves people engaging or adopting something new, the first step is to know whether they are aware of the solution or design. Measuring awareness is a good early indicator to help understand how big the impact of the solution may be.

Engagement
Like awareness, measuring the number of people who are engaged in a new program is often very meaningful. For example, if the goal is to increase women's incomes through a program to export local art, the number of women actively seeking out and participating in the program is a meaningful indication of how much impact the program may have on local incomes.

Dynamic Changes
When a new solution is introduced, it is important to track the changes over time that occur within the community, within households, and to the environment. These shifts can be completely unexpected, and are sometimes positive and sometimes negative. Its crucial to look out for these changes and unintended consequences early on in implementation.

WATCH OUT

Often teams look for only the positive and intended consequences. To get a full view of impact, it is critical to challenge yourself to look for the negative and unintended consequences of solutions.

TIP #1

Ask yourself what you would expect to see happening if the solutions were improving the lives of people. For example, if your goal was to increase household income, would women starting more businesses be an early indicator? If your goal was to increase childhood vaccinations, would the number of casual conversations about vaccines be a possible indicator?

TIP #2

It is critical to track the effects of solutions on men and women, young and old, empowered and disempowered – even if your ideas are focused on other groups. Often the group that is not the intended audience for the solutions is a key player in the implementation and use of solutions.

Facilitator Notes

Time:
1-2 Hours

Difficulty:
★★★☆☆

Step 1. Evaluation has many stakeholders, including constituents, community leaders, government officers, funders, and others. When developing a plan to evaluate outcomes and impact, engage as many of these stakeholders as possible in the creation of your evaluation and learning plan. What will success look like from these multiple perspectives?

Step 2. Have the team discuss various qualitative and quantitative measurement methods. Refer to methods that have been tried as best practices, and brainstorm new methods that might be necessary to achieve your specific goals. Which of these are appropriate for the challenge? Which of these methods speak to the interests and goals of the different stakeholders?

Step 3. Develop a plan that includes the right mix of qualitative and quantitative methods that will help the team keep learning about how to improve upon solutions and how to deliver those solutions more effectively.

STEP 6

METHOD: EVALUATE OUTCOMES

Measuring outcomes is critical to the learning cycle. Without a good assessment of the impact a solution has made, there is often not enough information about the direction or goals for the next round of designs.

Assessing outcomes is important for everyone – the implementer, the funder, the design team, and the community. Outcome measurement helps people understand where to best invest their resources. It is an opportunity to assess and plan for the future.

WATCH OUT

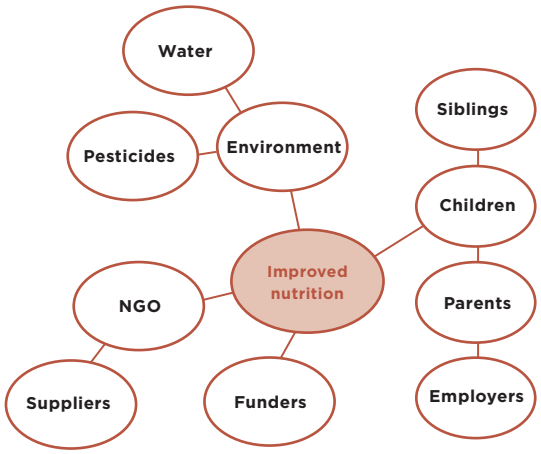
Outcome evaluation should not be a hurdle to the implementers, grantees, or design team. By viewing this phase as a continuation of design and opportunity for learning, outcome measurement can be a rewarding experience for everyone.

TIP

The measurement process is iterative – return to stories and feedback based on learnings from quantitative measurements, and use stories and feedback to discover which variables to include in quantitative studies.

TRY #1

Use evaluation results as an opportunity for reflection and creation of new design challenges.



Facilitator Notes

Time:
1-2 Hours

Difficulty:
★★☆☆☆

Step 1. List the different stakeholders in the system or develop a map. To develop a mind map, first write the name of the solution on a large poster or board.

Step 2. Draw a line from the solution to the primary stakeholders who will be affected by the solution.

Step 3. From each primary stakeholder, draw a line and list the secondary stakeholders that will be affected by the solution.

Step 4. Keep going by mapping more and more stakeholders, including human and non-human stakeholders. When you are finished, have the team assess which of the stakeholders might be better off as a result of the solution, and which might be negatively affected.

Step 5. Develop methods and techniques to measure the impact on the stakeholders who might be both positively and negatively affected.

Step 6. Hang the map in a place where people can refer to it often. Capture thoughts and learnings in a section of the map so that it becomes a living document for helping the team learn and engage in discussion.

TRY #2

HOLISTIC IMPACT ASSESSMENT

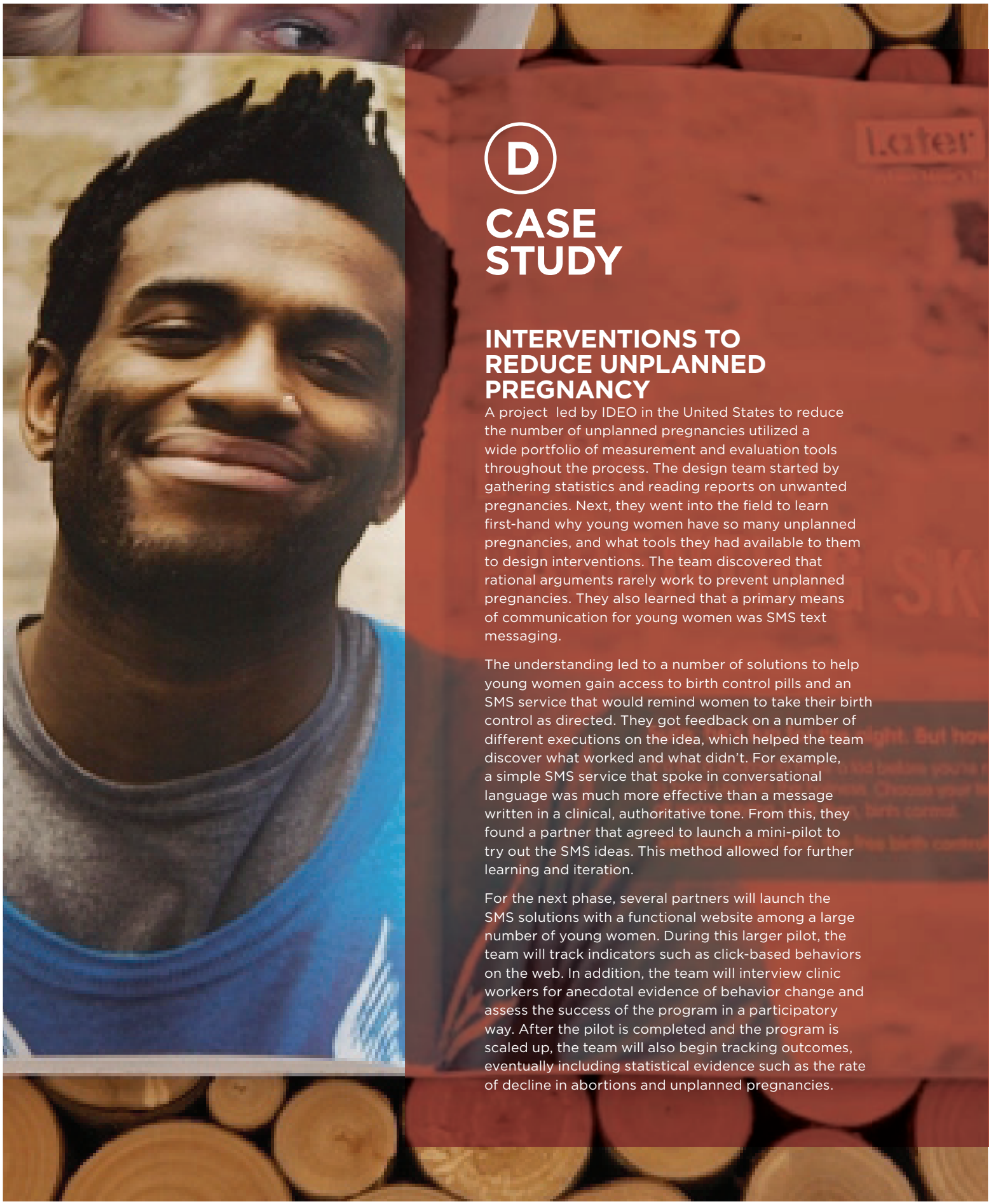
To assess the impact of a solution, program, or intervention, it is important to take a systemic and holistic view. Try the following exercise, or develop a method of your own.

1. Map or list all the stakeholders that your solution might touch – in positive, negative, or neutral ways. Try to create a complete list with many actors. A mind map format works well for this exercise. Remember to include stakeholders that your team may not be focused on, such as: funders, people in the same community or adjacent communities who are not receiving direct benefits, and non-human stakeholders such as animals, the environment, and natural resources. Put this map or list in a place where you can refer to it often.

2. As you see and track the effects of a solution, write the effects on the list or map. Color code the actors that receive benefits from the solution and those that experience negative effects. If possible, quantify the value of the effects with a standardized measurement system.

3. Using this learning, continue to iterate on the solutions to find ways to increase the positive effects and lessen negative effects.

4. Examine the solution's net value. Use this exercise as a way to continue learning and challenge the team to improve on solutions in order to make the outcomes more and more positive.



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CASE STUDY

INTERVENTIONS TO REDUCE UNPLANNED PREGNANCY

A project led by IDEO in the United States to reduce the number of unplanned pregnancies utilized a wide portfolio of measurement and evaluation tools throughout the process. The design team started by gathering statistics and reading reports on unwanted pregnancies. Next, they went into the field to learn first-hand why young women have so many unplanned pregnancies, and what tools they had available to them to design interventions. The team discovered that rational arguments rarely work to prevent unplanned pregnancies. They also learned that a primary means of communication for young women was SMS text messaging.

The understanding led to a number of solutions to help young women gain access to birth control pills and an SMS service that would remind women to take their birth control as directed. They got feedback on a number of different executions on the idea, which helped the team discover what worked and what didn't. For example, a simple SMS service that spoke in conversational language was much more effective than a message written in a clinical, authoritative tone. From this, they found a partner that agreed to launch a mini-pilot to try out the SMS ideas. This method allowed for further learning and iteration.

For the next phase, several partners will launch the SMS solutions with a functional website among a large number of young women. During this larger pilot, the team will track indicators such as click-based behaviors on the web. In addition, the team will interview clinic workers for anecdotal evidence of behavior change and assess the success of the program in a participatory way. After the pilot is completed and the program is scaled up, the team will also begin tracking outcomes, eventually including statistical evidence such as the rate of decline in abortions and unplanned pregnancies.

ACKNOWLEDGEMENTS

This Toolkit is the result of a project funded by the Bill & Melinda Gates Foundation. The BMGF brought together four organizations —IDEO, IDE, Heifer International, and ICRW—to partner in the creation of a method for guiding innovation and design for people living under $2/day.

As one of the key developers of the Human-Centered Design process, an IDEO team led the creation of this Toolkit. While IDEO takes responsibility for its shortcomings, we cannot take responsibility for any of its successes. These successes are the outcome of an extraordinary collaboration of partnerships on many continents—and the individuals that went above and beyond to prototype and field test these methods. Working on-site with IDE teams in Ethiopia, Zambia, Cambodia, Vietnam, and the US, as well as with Heifer International in Kenya, the HCD process was adapted for use with constituents in developing contexts.

IDEO revised and re-released the second edition of the Toolkit drawing on other social impact projects and on inspiration from outside users of the Toolkit.

Thanks to Kara Pecknold for sharing her use of the Human-Centered Design Toolkit in Rwanda as case study. Thanks also to Fidel Calderon and Indhira Rojas for the visual design of this edition. To add your own experiences or give feedback for the next ediition of this Toolkit, email contactSI@ideo.com

This is a working prototype.
Let's keep learning, adapting, and iterating together.