Documenting Evidence-Based Outcomes

Final Report Contents

- About the Organization
- Scope of Work
- Outcomes
- Recommendations

Audience Pitfall

School writing: Assignments by teachers who don't want to read them, to students who don't want to write them; a perpetual and unnecessary misery upon which hinges the student's future, and the teacher's present, livelihood.

http://beyond-school.org/2008/02/29/what-is-schooliness-maxim-1-writing-lessons/

- Who you are writing for?
- Who is the audience for your outcomes?
- Why are you writing for them?

Audience

1. You
2. Your client
3. Your client's organization
   - I.e. management, staff, board of directors
4. Financial donors
5. Government agencies that support the organization
6. Other similar organizations
7. Other organizations with similar problems
8. Future Student Consultants
9. Prospective Employers
10. Family
11. Instructor

Why document outcomes

- Articulation
- Validation
- Reflection
- Communication
- Archiving

Articulation

- A means by which you can reflect on and describe:
  - What you did
  - What worked
    - Why
    - And what is the significance that it worked
  - What did not work
    - Why
    - And what is the significance that it did not work
  - What still needs to be done.

Validation

- It allows your client to correct misconceptions that you or the client had, and arrive at a common understanding of the outcomes.

Reflection

- Your client is likely to not have done this refection on what has transpired, and it adds to your value as a consultant.

- In other words, your articulation is their reflection

Communication

- To allow all stakeholders to know what was completed, what work remains, and the significance of both.

Archiving

- Your report can be permanently available for others to refer to
  - Future employees to learn why things are how they are
  - Similar organizations who want to do similar things

Types of Outcomes

- **Process indicators**
  - Action steps that indicate the quality of how the problem was solved / opportunity realized
    - E.g. Ayole: A village meeting was held to discuss how they raised funds in the past and how they can fund buying pump parts.

- **Intermediate outcomes**
  - Partial results, important steps, milestones
    - E.g. Ayole: Village committee decided to create a community garden and sell produce to raise pump repair funds.

- **Long-term outcomes**
  - Addressed the original problem / opportunity
    - E.g. Lower incidence of guinea worm

Why Process Indicators?

- Why is *how* the funding decision was made useful to understanding the quality of the decision?
- What would be your process indicators?

Why Intermediate Outcomes?

- Why are partial results, important steps, milestones, or decisions such as how to fund pump replacement parts useful to document?
- What are some of your intermediate outcomes?

Long-Term Outcomes

- You can't really measure long-term outcomes during the semester.

- Therefore you look for indicators of sustainability.

- E.g. Ayole, they successfully repaired the critical bladder problem.

Document all 3…

- When we talk of *outcomes,* it means:
  - Process indicators
  - Intermediate outcomes
  - Long-term outcomes

Ayole increased capacity

- What evidence of increased capacity was there in Ayole?
  - Technology capacity
    - e.g. tools
  - Human capacity
    - i.e. knowledge
  - Organizational capacity
    - e.g. work practices

Ayole increased capacity

- Working pump
- Village folk used the pump
- Healthy water consumed
- Incidence of Guinea Worm down
- Mechanic chosen
  - Process indicator: *How?*
- Mechanic trained
  - Process indicator: *How?*
- Overseer named
- Committee established

Sustained capacity

- What evidence is there that the new capacity will be sustained?

Ayole sustained capacity

- Pump has been working for n months.
- Village folk have become dependent on it, never go to fetch groundwater.
- Village folk articulate the health benefits of pump water over ground water
- Mechanic has fixed the pump m times.
- Mechanic and committee successfully fixed critical "bladder" problem.

Capacity vs. Sustainability

- What is the difference between
  - Evidence of increased capacity
  - Evidence of sustainability

New vision

- How has Ayole built a new vision of how technology can support the village?
- Do you have any examples of your client developing a new or expanded vision regarding technology?

Sustainable capacity

Assume some system that requires member administration…

1. We showed the client how to do member administration
2. We taught the client to to member administration
3. We documented the set of steps to administer members
4. The client documented the set of steps to administer members.
5. The client has changed membership information once.
6. The client has added all staff members into the system.
7. The client has added all 40 staff members.
8. Membership administration guidelines are now written in organization policy.
9. The client has held member administration training for the rest of the staff.
10. The client has not yet used the member administration function.
11. We practiced breaking member administration and then diagnosing and fixing it with the client.

Evaluating evidence

The donor management system is installed with the imported data and works fine. Mass mailings to groups of donors can be printed, donors, gifts and pledges can be added and modified easily and with a few mouse-clicks, and different comprehensive reports can be printed. In the past, Ms. Moore updated a little report each week containing all gifts received so far in the current year split up by donor-type. She collected this data in a spreadsheet and wrote them in a Word document. This information is now directly available through one of the reports generated by the software. The different reports provide a very broad overview of all fundraising activities that were not accessible through the Excel spreadsheets before.

Evidence?

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- What is concrete? What is fuzzy?
- What is it evidence of?
  - People? Process? Technology?
- What is implied, but it is not really evidence of?
- How could it be improved?

Evidence?

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Unachieved goals

- What do you do when things did not go as planned?
- Or another way of saying it:
  - when there is no evidence that things did go as planned.
- Unachieved outcomes / lack of evidence
  - Is not about you or your failure
  - Is not about your client's shortcomings
- It is an objective assessment of the capacity of the [organization, client, program, etc.]

Goals-not-met guidelines

- Don't use generalizations as a smokescreen for a lack of evidence
  - Mr. X has been shown how to…
- Put evidence that does exist in a positive light
- Express unachieved outcomes or a lack of sustainability evidence as:
  - An ongoing problem
  - A still-outstanding opportunity
  - A risk to sustainability

Unachieved outcome example

- Mr. X was able to enter data into the tables. He did not, however, have the opportunity to create any new tables nor add columns to existing tables. Consequently the sustainability of the database will be a problem as the organization's needs change.
- Then make recommendation:
  - To prolong the usefulness of the database, it will likely be necessary to be able to make changes to it. When the need arises, here are some options that are available…

Unachieved outcome example

"The client is comfortable in maintaining (adding more entries or adding/deleting columns) the existing tables that we've created. So long as the current database structure does not change significantly, the project will remain sustainable. However, we didn't cover table relationship and normalization in great detail since the contact list did not require such complicated tables. Therefore, if more complex changes are needed, then outside help may be required."

Example

- With no active fundraising ticket sales, the PayPal checkout has not been tested in a real situation as of this date.

- Therefore there is a significant risk that unforeseen problems will occur for a real event, forcing them to revert to their old method of ticket sales.

Keep Your Judgments Out

"I am exceedingly proud of the way Mr. Taylor has been able to update data in the background CMS that provides data to the mobile app ."

- To whom is the outcome of value?
- How else could this be worded?

Avoid chronological narrative

After contacting various individuals and not receiving a clear picture on how to extract data from their donor database, we spoke to David, a contact a TownNet, the company that hosts AYF's server. David provided documentation that clearly outlined steps of how to go about querying the database remotely. We found that the database could be queried in a standard HTTP REST*ful* style. With this information we were able to generate some sample queries that we then went back to David to validate before testing them live on the database.

- What is wrong with a report in this style?
  - It makes the reader work to find the important points
    - What are the important points?
  - It implicitly tries to argue that the team kept busy
    - It is about the team, not about the value to the client
    - Busy is not important to the client.
- Process indicators and outcomes are important.
  - Sequential steps that indicate the **quality** of the process should be documented
  - A list is typically a more effective organization than prose for this.

Assignments

- Outcomes homework