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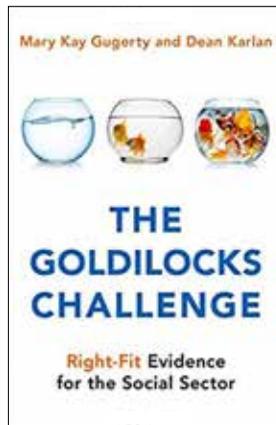
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The Goldilocks Challenge: Right-fit Evidence for the Social Sector

Reviewed by Veena Pankaj

The spotlight on performance and accountability throughout the nonprofit sector has made it more important than ever for nonprofits to understand and demonstrate their effectiveness and impact. Knowing what data to collect is vital to the success of all social sector organizations. In their book, *The Goldilocks Challenge: Right-Fit Evidence for the Social Sector*, Mary Kay Gugerty and Dean Karlan equate the struggle to find the right-fit in monitoring and evaluation systems to the challenges that Goldilocks faces in the fairytale of *Goldilocks and the Three Bears*.

Gugerty and Karlan bring an academic perspective grounded in development economics steeped in the research and issues surrounding management and accountability within the social sector. Through her work on nonprofit performance and accountability systems, Gugerty has the vantage of the people within organizations trying to prove impact and make program improvements. Karlan contributes a different viewpoint through his research on measuring the impact of programs and offers additional context from work in Africa, Asia, and Latin America. This book is written for those within social sector organizations who are developing decision-making systems to improve programs and impact.



The Goldilocks Challenge: Right-fit Evidence for the Social Sector by Mary Kay Gugerty and Dean Karlan, Oxford University Press, 2018. ISBN: 019936608X, 9780199366088

Through a series of illustrative examples and case studies, the authors present a framework to guide the selection of a “right-fit” evaluation approach. The framework introduced in this book incorporates four principles, referred to as the CART principles:¹

- Credible – Collect high-quality data and analyze them accurately.
- Actionable – Collect data you can commit to use.
- Responsible – Ensure the benefits of data collection outweigh the costs.
- Transportable – Collect data that generate knowledge for other programs.

The authors emphasize that CART principles can guide organizations to select the type of data to collect, and when it may or may not be useful to consider impact evaluation. While the concepts within the CART principles are not new to the sector, presenting them in clear, logical, easy-to-follow steps is a valuable contribution to the field. The straight-forward presentation of concepts backed by examples will help nonprofit leaders and program staff better understand the distinction between monitoring and evaluation, and be more intentional and focused when collecting data. The insights provided by *The Goldilocks Challenge* will enhance the ability of

¹ Gugerty, M. K., Karlan, D. (2018). *The Goldilocks Challenge: Right-fit Evidence for the Social Sector*. New York. Oxford University Press, p. 10.

social sector organizations to facilitate conversations with funders about what types of data collection methods are appropriate using the CART principles as a guide post. Similarly, the approach outlined in this book can also help funders set realistic expectations when requesting data from the organizations they fund.

The Goldilocks Challenge is organized into three distinct sections: Part 1 focuses on the CART principles and delivers a detailed description of each. Part 2 provides case examples highlighting real-world experiences across a range of social sector organizations. The concrete examples illustrated through these cases further reinforce the CART principles highlighted in the first part of the book. Part 3 examines the topics explored by this book from a funder perspective. Although brief, this section provides readers with a glimpse of alternative approaches to accountability such as the Pay for Success model, nonprofit rating systems, and impact audits.

The CART principles presented in this book support programmatic learning and provide guidance on collecting actionable data for decisionmaking, learning, and improvement. The academic and research-oriented lens of the authors bring rigor to these principles, distinguishing between data needs for monitoring and evaluation and raising the bar on evidence for impact. For example, Gugerty and Karlan highlight the importance of knowing what would have happened in the absence of a program, also referred to as a counterfactual, to fully understand program impact. While I appreciate the need to understand causal impact beyond outcomes, it is worth acknowledging another body of work within the social sector that does not fit neatly within this paradigm. This work stems from the growing desire among social sector organizations to restructure and shape systems to promote social good — a byproduct of our current political and environmental climate. Organizations working in this space typically engage in advocacy and policy change work and operate under conditions of uncertainty, marked by flexible boundaries, emergent strategies, and shifting timelines, making it difficult, if not impossible, to establish a counterfactual. In lieu

To be credible, as defined by the authors, data need to be valid, reliable, and free of bias. I encourage those that adopt this framework to integrate a broader definition of credibility, one that incorporates stakeholder perspectives in defining constructs and determining what is considered credible and what is not.

of counterfactuals, approaches such as process tracing and contribution analysis have emerged to systematize and provide rigor around the range of evidence collected to demonstrate causality. Albeit important to set a high bar for measuring impact, there is value in maintaining some degree of flexibility in defining what we construe to be credible evidence.

While the CART principles are designed to help organizations streamline data collection to promote data use, there is a tension between how *credibility* is defined by the authors and how it may be interpreted by practitioners in the field. The CART principles do not take into account stakeholder involvement and participation in the evaluation process. To be *credible*, as defined by the authors, data need to be valid, reliable, and free of bias. I encourage those that adopt this framework to integrate a broader definition of credibility, one that incorporates stakeholder perspectives in defining constructs and determining what is considered credible and what is not. Through my work as an evaluation strategist for nonprofits and foundations, I have found that involving stakeholders in operationalizing a concept invites a diversity of perspective that contributes to the overall credibility of the evaluation from the vantage point of program

stakeholders, which in turn leads to buy-in and use, contributing to the overall *actionability* of the evaluation results.

One of the distinguishing features of this book is the authors' unrelenting focus on evaluation use. The *actionable* principle promoted by the authors suggests that organizations only collect data they can and will use. From my perspective, one of the biggest challenges experienced by social sector organizations is finding ways to embed data collection and evaluative thinking into the culture of the organization. I appreciate the authors' emphasis on organizational practices, such as internal data sharing and reporting, as a means to create a culture of learning and inquiry.

What I value the most about this book is the authors' ability to take the challenges they witnessed through their own work to create a simple, easy-to-follow framework that addresses those challenges. Their aptitude to understand these struggles from the perspective of those experiencing them comes through in their ability to clearly define concepts, provide guidelines, and share illustrative examples to help organizations make informed decisions about what data to collect. This is especially relevant in a world where data is abundant and expectations for accountability continue to grow. It is more important than ever for organizations to demonstrate their impact or contributions towards it, through right-fit data approaches for monitoring and evaluation.

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