PERFORMANCE MEASUREMENT INITIATIVE
William Davidson Institute at the University of Michigan

CONSULTING REPORT

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Prepared by K-TELL Consulting (SI501 Fall 2017)

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Client Information

The William Davidson Institute (WDI) is a non-profit organization located on the campus of the University of Michigan. The organization works to provide low- and middle-income economies with private-sector solutions. WDI carries out this work through a variety of initiatives, which include Education, Financial Sector Development, Healthcare, Performance Measurement, and Scaling Impact. K-TELL Consulting specifically worked with the Performance Measurement Initiative (PMI), which produces assessment measures for the organizations and businesses that WDI works with around the globe. The data derived from these measures is later used to increase the efficiency and value of those organizations and businesses, as well as encourage more sustainable practices.

Problem and Methodology

PMI has traditionally struggled to form relationships with faculty at the University of Michigan that can eventually lead to faculty collaborations. Throughout the course of our interviews with PMI and other WDI staff members, we were told that faculty rarely show up to the initiative's events, making it difficult for PMI staff members to readily locate faculty who might be interested in collaborating on a project. As a result, PMI staff members have found themselves having to peruse departmental websites to locate faculty who they hope will be interested in collaborating with them.

K-TELL Consulting used the contextual inquiry method to investigate PMI's current processes in conducting outreach to potential faculty collaborators and identify areas where those processes can be improved. We collected data through observations and interviews with two PMI staff members, as well as three additional WDI staff members and one faculty member whom PMI has collaborated with in the past. Our analysis of this data led us to produce several findings and recommended solutions for the PMI team.

Findings and Solutions

The data we collected guided us to the following higher-level findings:

1. PMI creates their own promotional materials when WDI's Marketing team could be performing this work.
2. WDI's Marketing Manager has the necessary tools to help PMI with outreach.
3. PMI's events do not help the Initiative form collaborative relationships with faculty.

With these findings in mind, K-TELL Consulting recommends that PMI staff members should (1) begin collaborating with the marketing team when conducting outreach efforts, (2) tailor their events to attract a larger faculty audience, and (3) create a more standardized process for conducting faculty outreach.

INTRODUCTION

During the fall semester of 2017, the K-TELL Consulting group engaged in a consulting project as part of the SI 501 class. The client was the Performance Measurement Initiative (PMI) at the William Davidson Institute (WDI) at the University of Michigan. PMI submitted a project proposal to the SI 501 course prior to the beginning of the fall semester. They sought advice on a specific problem: how to better engage with faculty at the University of Michigan in order collaborate with other experts in the field of evaluation of international development initiatives.

K-TELL Consulting carried out a process of contextual inquiry in order to investigate PMI's situation and provide feedback and recommendations for their problem. This report details our team's findings and resulting recommendations. Background and context related to the client and their problem, as well as an outline of the methods used are also included below.

The Client

The William Davidson Institute (WDI) was formed at the University of Michigan in 1992, by founder William Davidson. The group is a non-profit organization which focuses on designing and implementing private sector business solutions to a variety of issues in developing low- and middle-income economies.[1] These projects are carried out by five different initiatives within the organization. These include the Education Initiative, the Financial Sector Development Initiative, the Healthcare Initiative, the Scaling Impact Initiative, and our specific client, the Performance Measurement Initiative (PMI). Through their work, WDI and its various initiatives partner with other organizations, corporations, and foundations in order to provide services to complete their various projects. PMI specifically focuses on evaluating and assessing these projects, measuring the success throughout the entire process of the project from beginning to end.

Relevant Programs Hosted by the Client

WDI engages with faculty, students, and other relevant parties at the University of Michigan and across the country in a multitude of ways. A couple of the regular functions of the organization are critical to understand in order to create a complete picture of the situation K-TELL Consulting was invited to assess for PMI.

- Global Impact Speaker Series – WDI regularly hosts leaders and innovators from around the world who are active in economic and social development in "emerging market economies."[2] These speakers discuss their experiences and current issues and debates in the field of economic development. The series is primarily open to UM students and faculty, who occasionally also have the opportunity to talk with speakers in smaller groups after their presentations.
- Social Media and Marketing – WDI is present on Twitter and Facebook. Through these sites, the organization promotes their current projects, events, and achievements. In addition, WDI publishes business case studies which are marketed and made available to business schools and other organizations around the world.[3] As a result of these and other marketing efforts, the Institute as a whole has access to contact information for a wide variety of faculty and other professionals.

[1] "About." William Davidson Institute at the University of Michigan. Accessed December 6, 2017. http://wdi.umich.edu/about/.

[2] "Global Impact Speaker Series." William Davidson Institute at the University of Michigan. Accessed November 30, 2017. http://wdi.umich.edu/engage-with-us/u-m-student-opportunities/global-impact-speaker-series/.

[3] "Case Publishing." William Davidson Institute at the University of Michigan. Accessed November 30, 2017. http://wdi.umich.edu/engage-with-us/case-publishing/.

The Main Problem

K-TELL Consulting's specific client within WDI, the Performance Measurement Initiative, is seeking to increase its collaboration with faculty at the University of Michigan. While PMI regularly engages with other organizations, such as USAID, for expertise on their performance evaluation efforts, they are finding that there is a specific lack of awareness on the university campus regarding collaboration opportunities for faculty at the University of Michigan. PMI is interested in increasing these connections because they believe that their services could be beneficial to other faculty researchers, and that PMI can in turn benefit from the expertise of these individuals who have a more intimate understanding of the specific fields in which PMI is evaluating projects. In order to address this situation, K-TELL Consulting was asked to evaluate the client's current outreach efforts on campus and recommend systems and practices to increase awareness, engagement, and collaboration with university partners.

Performance measurement, which is closely related to the fields of program evaluation and impact assessment, is a complex type of social research that requires thorough understanding of the program being evaluated, the context in which the program is executed, appropriate measurement techniques, methods of quantitative analysis, and more. Regardless of how skilled the core evaluation team may be, collaboration with experts—stakeholders and non-stakeholders alike—can strengthen evaluation design and execution, ultimately producing a more accurate, reliable, and credible evaluation.[4,5] Since WDI facilitates the enactment of so many different types of programs in so many different communities around the world, it is understandable that the four members of PMI would be interested in finding collaborators. At present, members of PMI have a somewhat haphazard method of seeking collaborators; they send personal emails to professors with similar research interests, but many of these emails go unanswered. With the establishment of a protocol for contacting and tracking engagement with collaborators, PMI staff may be able to improve both the quality of their evaluations and the efficiency with which they are executed.

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[4] Centers for Disease Control and Prevention. "Framework for Program Evaluation in Public Health." Morbidity and Mortality Weekly Report (MMWR), 1999;48 (No. RR-11), p. 32-33.

[5] United Nations Evaluation Group. "Norms and Standards for Evaluation," New York: UNEG, June 2016, p. 24. http://www.unevaluation.org/document/detail/1914.

In order to effectively examine the situation facing PMI, K-TELL Consulting engaged in a detailed process recognized as contextual inquiry. The following describes the methods our team employed in order to create recommendations for the client.

Contextual Inquiry

The process of contextual inquiry is a user-focused method of qualitative research that can lead to effective consulting. It is a technique that was promoted by Hugh Beyer and Karen Holtzblatt in the computer software industry, yet the concept is relevant to a variety of disciplines. In this technique, the goal is to focus on the client by going to their workplace, conducting in-depth interviews with various individuals involved in the situation, and observing these individuals as they conduct their daily work, in order to gain a thorough understanding of the situation at hand.[6] The first step in the contextual inquiry process, therefore, is to conduct these in-depth interviews and observations.

Interviews

After an initial meeting with members of the PMI team who served as the primary client contacts for our team, a list of individuals within WDI whom we had permission to interview was confirmed. In total, we interviewed six employees within WDI and one faculty collaborator. Two members of K-TELL Consulting were present for each interview – one person to conduct the interview and one to take detailed notes. Interviews were conducted with three members of the PMI team, two members from Marketing and Communications, and one other manager within WDI. Our team also interviewed a University of Michigan faculty member who had collaborated with PMI in the past. In several cases, our team examined documents the client had produced such as promotional materials and was shown various contact databases used throughout WDI.

Data Interpretation and Analysis

After each interview, typically within 24-48 hours, the K-TELL members present for the interview met with the rest of the team to debrief what was discussed. At these meetings, one team member recorded affinity notes – one sentence, stand-alone statements which summarized key facts from the interview. When all of the interviews and interpretation sessions were completed, the next step was to begin analyzing our findings by creating an affinity wall.

An affinity wall requires the arrangement of sticky-notes containing all the affinity notes on a wall (or, in the case of this project, a long piece of brown butcher paper) in such a way that begins to thematically summarize the observations. To begin, each affinity note collected from the interpretation sessions is written on an individual yellow sticky-note. Then, our team got together and began reviewing these notes

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[6] Toyama, Kentaro. "SI 501 Overview: Contextual Inquiry and Consulting Foundations," August 29, 2017.

and organizing them into clusters of similarly-themed facts, perspectives, or observations. These clusters typically consisted of about 4-6 individual notes. The unifying theme of each cluster was summarized in a single sentence which was written on a pink sticky-note that served as a heading for the cluster. The team then considered the observations at the pink sticky-note level and again formed these into thematic groups of 3-5 related observations. These groups were again summarized with a single sentence which was written on a blue sticky-note. This process was iterated through one final time so that the blue level sticky-notes were also summarized by one more higher-level observation combining 2-3 of the ideas onto a green sticky note. These green level observations represented the key themes that were revealed through our observation of the client and began to give insights into the recommendations that would be most useful to their problem. Refer to the figures below for pictures of the affinity wall.

Figure 1: K-TELL Consulting team members organize observations recorded on sticky notes while assembling the affinity wall.
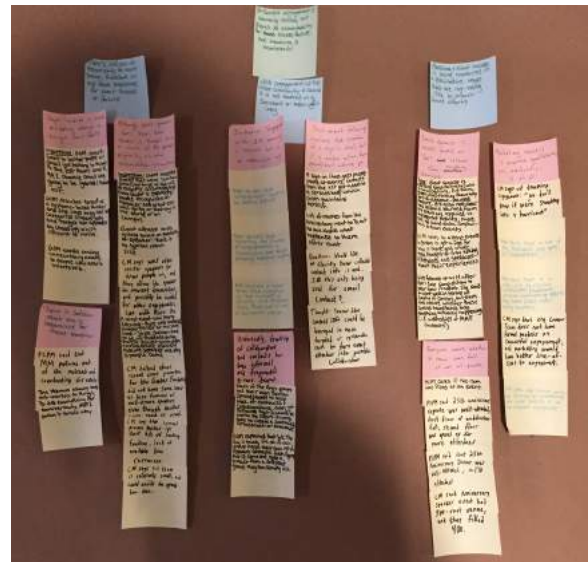

Figure 2: A portion of the completed affinity wall, hierarchically organized by color and concept.

Overview

When PMI seeks a faculty collaborator for a particular project, the outreach process is highly individualized and non-systematic, relying on searches for relevant faculty profiles within departmental websites as well as pre-existing personal connections to faculty members. Once initial contact is made with a potential collaborator, much of the preliminary communication is focused on explaining the research that PMI staff members conduct and describing what the collaboration would entail (i.e., a consulting or advising role). When asked what an ideal collaboration situation might look like, members of PMI indicated a desire for faculty members to have a prior familiarity with the work of WDI and PMI, to be excited about the opportunity to collaborate, and even for faculty to reach out to the initiative, suggesting project collaboration ideas of their own. As such, the observations and recommendations outlined in this section are informed by the overarching theme of raising the profile of WDI and of PMI, specifically, among faculty at the University of Michigan, with the ultimate goal of increasing and facilitating collaboration with expert faculty members.

Findings

1. PMI does their own promotion, and the marketing team is underutilized
There is currently little to no coordination, communication, or interaction between PMI members and WDI's Marketing Manager. As such, members of PMI take responsibility for their own marketing efforts. (It is worth noting that this lack of communication with the Marketing Manager is not unique to PMI; it seems as though the Marketing & Communications Team may be underutilized throughout WDI as a whole.)

Although they are one of the larger initiatives at WDI, PMI is a particularly busy and hard-working group, typically fully saturated with cutting-edge research projects. Because the research conducted by PMI is highly specialized, the members of the initiative feel that they are best equipped to communicate the intricacies of their work, and they spend a considerable amount of time conducting outreach, preparing for public-facing events, and contributing to the production of promotional materials such as videos, PowerPoint presentations, and handouts, in addition to their research efforts. Furthermore, some opportunities for outreach and collaboration within the University of Michigan, such as the Ross MAP program, that work to raise the profile of other initiatives are less relevant for PMI because their work requires a more refined skill set that most students don't possess.

2. WDI's Marketing Manager is equipped to assist PMI with challenges in outreach

The Marketing Manager has decades of experience with marketing and communications in both the private and public sectors, providing her with a unique and valuable perspective on the marketing challenges facing WDI and its component initiatives. In addition to her general marketing expertise, the Marketing Manager possesses a powerful set of resources specific to the University of Michigan, including databases of faculty contacts, that could be more heavily utilized for on-campus outreach to faculty. The Marketing Manager has demonstrated her capabilities within WDI through her collaboration with the Education Initiative. In interviews with members of PMI, however, the Marketing Manager's name and department were seldom mentioned. Furthermore, when asked directly to describe the roles and capabilities of the Marketing & Communications Team, members of PMI were knowledgeable about the Communications Manager's role, with whom they have more direct contact in the production of promotional materials. Meanwhile, they had difficulty articulating the Marketing Manager's position beyond her involvement with the case publishing department. Likewise, the Marketing Manager indicated that she had little formal contact with anyone from PMI.

3. PMI events do not lead to collaboration with faculty

PMI members host and attend numerous events on-campus that could potentially raise awareness of the initiative's work, but these events are currently doing little to facilitate collaboration with faculty experts. Members of PMI spend a substantial amount of time and effort on these events, coordinating logistics and invitations, preparing talking points, and producing materials including handouts and PowerPoint presentations. The Marketing & Communications Team is only minimally involved with PMI directly, and are often brought on at a late stage of event planning. Furthermore, there is a diffusion of responsibility surrounding event follow-up, including the collection and compilation of contact information from attendees; no one from PMI knew where this information went or how it was used after the conclusion of an event.

One major challenge facing PMI is the fact that relevant faculty members do not seem to be attending these on-campus events at all. In preparation for the open house hosted by WDI after their relocation to Central Campus, for example, members of PMI submitted a list of 33 faculty members to be invited to the event, but ultimately, none of the invited faculty members attended. On another occasion, PMI hosted a brown bag lunch event at the School of Public Health during which members of the initiative would have the opportunity to share their work with students and faculty, but only the organizer of the event and an assistant were in attendance. Events such as the monthly Global Impact Speaker Series have historically had better attendance, but most of the people who come to those talks are students, not faculty members with whom PMI is interested in collaborating. Since faculty attendance is low, the time and effort that members of PMI put into preparing for events feels wasted.

Based on these examples of low faculty attendance, some members of PMI concluded that faculty members are simply too busy to attend events, and suggested that alternative outreach activities may be more effective in capturing the interest of faculty. One member of the initiative had a slightly different interpretation, suggesting that the issue may not be one of prohibitive busyness but of priorities, explaining that a) faculty members have extremely focused research interests and are generally not interested in expanding their focus, and b) faculty members must be approached for collaboration and inspiration at the conception phase of a new project, before it has completely solidified.

Our interview with a faculty member who has previously collaborated with PMI revealed more about how faculty decide whether or not to attend events, and shed some light on ways that the Initiative's events could be improved to better target potential collaborators. Although the Faculty Collaborator did cite a busy schedule as one barrier to attendance, she said that she would be motivated to attend events if they contained more advanced content. Specifically, the Faculty Collaborator reported a desire to attend events at which notable scholars are presenting cutting-edge research, particularly if there are opportunities to engage one-on-one with the presenters that may lead to future research collaborations. The Faculty Collaborator also discussed the logistical feasibility of event attendance regarding location, time of day, and considerations such as parking. While the account of one faculty collaborator may not be speak to a comprehensive solution, her thoughts would be worthwhile to incorporate when designing WDI's future event programming.

Recommendations

Based on the 3 primary findings above that came about from our research, interviews, and analysis, we were able to devise 3 recommendations to address low event attendance, low awareness of PMI among faculty, and difficulty in finding appropriate faculty collaborators. These recommendations are long-term approaches that can be implemented immediately, and there are many intersections among them.

1. Closer collaboration between PMI and the Marketing Manager
In general, closer collaboration between the members of PMI and the Marketing Manager would improve both the efficacy and efficiency of marketing efforts to faculty and other potential collaborators. Although the work of PMI is highly specialized, members of the Initiative are not experts in marketing, and therefore may benefit from assistance regarding the communication of their work to a broader audience. The Marketing Manager possesses both the resources and expertise necessary to successfully raise awareness of the unique and exciting features of PMI's research within the University of Michigan, which will in turn facilitate collaboration with expert faculty members. Coordinating with the Marketing department will require an initial investment of time and effort in order to set goals

and expectations on both sides, but will ultimately allow the members of PMI to spend less time on outreach efforts and more time conducting research.

In addition to assistance with message-crafting, the Marketing Manager has access to 2 powerful tools that can assist with faculty outreach efforts:
1. **WDI-wide Stakeholder Database:** A database of contacts that have been accumulated across initiatives that currently contains approximately 4,000 contacts. This database is primarily used when adding recipients to emails containing newsletters and promotional material.
2. **Case-Publishing Faculty Database:** A database used primarily for case publishing-related correspondence. It contains tens of thousands of faculty contacts from over 600 business schools globally.

This recommendation will yield the most immediate results. As briefly noted in our findings above, during our interview with the Marketing Manager, she shared that the Education Initiative staff approached her to assist with outreach efforts for a project they were working on. Using MailChimp, she was able to draft up an appropriate email, and send it out to thousands of recipients. Within one business day, the Education Initiative staff received hundreds of replies from interested faculty members. In fact, they so were overwhelmed with the response volume that they asked for the Marketing Manager's assistance in figuring out who would be the best candidates to move forward with. She was able to reassure them that the MailChimp allows for querying that makes navigating hundreds of responses more manageable. Consulting with the Marketing Manager on a regular basis in regard to searching for faculty collaborators and promoting events could yield similar results for PMI.

2. Events should be tailored to faculty needs
PMI should coordinate with both invited speakers and the Marketing & Communications Team in order to tailor events to University of Michigan faculty in terms of content, format, timing, and marketing strategies. Although the current landscape of events may be serving the needs of the other initiatives, who are looking for student interns in addition to faculty connections, the highly specialized nature of PMI's work means that its team is seeking more engagement with faculty than with students. The events hosted and attended by PMI members, therefore, should target the intended audience. The problem is not that the wrong kinds of events are being offered, per se, but successful events must be designed with clear goals in mind. This recommendation operates on several levels:

1. **Incorporate the Marketing & Communications Team during the preliminary stages of event planning, and communicate about the intended audience and desired outcomes for each event.** Much as "even small investments in measurement can save extensive time and resources down the road," marketing is most effective when the groundwork is laid upfront, and members of both PMI and the Marketing & Communications Team will save time when marketing is considered early in the event planning process.

2. **When selecting speakers, topics, and event formats, consider faculty interests in cutting-edge research and opportunities to engage directly with prominent scholars.** Faculty will not attend talks about topics and concepts with which they are already familiar, and may be more interested in attending events with formats that better facilitate discussion and one-on-one interactions. Faculty are unlikely to attend events from which they receive no direct benefit.

3. **Likewise, be aware of faculty priorities when scheduling events, considering the time of day, the time of the semester or academic year, and the time within research grant cycles, in addition to event location.** Faculty receive many invitations, and will not attend those that are inconvenient.

4. **With the assistance of the Communications & Marketing Team, consider marketing strategies that will reach faculty members most effectively.** This may include hanging flyers in relevant departments, in-person announcements to departmental meetings, and more targeted emailing.

5. **PMI may also wish to consider additional outreach efforts that could raise their profile within relevant academic departments and build relationships with potential future collaborators.** In particular, the forthcoming "Pro-Tips Series" from PMI may provide a fitting platform. The workshops, which will provide audiences with instruction on how to design research projects in the international development field, could be presented to faculty and students within departments of interest, or integrated into graduate-level courses. In a less formal capacity, members of PMI might also look to attend more events (e.g., talks, colloquia, conferences, workshops, meetings) where faculty members of interest are likely to be in attendance.

3. Develop a standardized process to support faculty outreach

In order to achieve positive results from the above recommendations, developing a process that will ensure consistent communication with the marketing manager, and provide her with the most up-to-date contact information is essential. The process developed would need to have the following facets:

1. **Hold a weekly or bi-weekly touchpoint meeting with the Marketing Manager to advise of possible upcoming projects pending funding, projects moving forward currently in need of collaborators, and upcoming events that need to be promoted.** Having these meetings consistently will allow the Marketing Manager to prioritize action items by urgency, and make her aware of tentative tasks that she can begin planning for. Her role in these meetings would be to advise what she can do to assist with new outreach tasks, and the current status of tasks agreed upon in previous meetings. Example tasks that fall within the Marketing Manager's expertise include drafting of promotional messaging, compiling a list of faculty members that will be emailed, or providing analytics on messages previously sent. It is the PMI team's responsibility to coordinate and schedule these meetings, and ensure that all current work that needs promotion or outreach is brought to the Marketing Manager's attention as early as possible, so that she can

proactively plan how to assist based on capacity. In an ideal scenario, earlier notification will lead to a more robust marketing or outreach strategy that will lead to more respondents and event attendees.

2. **Establish a clear protocol for post-event follow-up with potential faculty collaborators.** Currently, there is no standardized process for following up on attendee sign-in information collected at PMI events. Coming up with a consistent way to get this information recorded in a centralized location such as the WDI Stakeholder Database in partnership with the Marketing Manager would be ideal. These new contacts could then be included in future communications along with existing ones. Even if there is no relevant project at present, faculty are more likely to engage with collaborators if they have a personal connection with the group or individual in question, so an investment in personal relationships with faculty members will pave the road to future collaboration.

3. **Move away from current promotion and outreach practices to promote consistency.** As a best practice, before looking for potential collaborators in ways that are currently used, such as cold-contacting faculty after finding their information on department websites, consult with the Marketing Manager to see if appropriate contacts already exist in one of the contact databases. While screening respondents through follow-up and developing rapport will be PMI's responsibility, the Marketing Manager is better equipped to send out mass emails for initial contact. Making consistent contact with the Marketing Manager, and ensuring that initial mass communications go through her will ensure she is able to assist to the best of her ability. Being conscious of past practices, acknowledging that a new process may be initially difficult, and explicitly reminding the PMI team that a new standardized process will make for more capacity to research and write grants.

CONCLUSION

In our efforts to address PMI's desire to more effectively connect with University of Michigan faculty collaborators on performance measurement projects, K-TELL Consulting used the contextual inquiry method to interview relevant stakeholders, identify current outreach practices, and devise a feasible, effective solution. During this process, we discovered that WDI's Marketing Manager is very experienced, and has been able to assist other initiatives with faculty outreach to great success. PMI has not had substantial experience partnering with the Marketing Manager up to this point, however, and has instead preferred to conduct faculty outreach on their own.

With this in mind, our recommended solution proposes establishing a formal process to engage the Marketing Manager on a regular basis to develop appropriate outreach strategies, and tailor messaging and event content based on the faculty population that PMI intends to attract for their collaboration needs. The Marketing Manager is equipped with powerful contact databases and communication tools to assist in making initial contact, and can assist the team with the promotion they had previously done themselves, freeing up time to allow them to focus on research. While there will inevitably be challenges in formalizing a new outreach and promotion process, we strongly believe that results from early efforts using our recommended approach will produce the quality partnerships and increased event attendance PMI is looking for.

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