The Discovery Timeline: An Overview

BY DONNA STUDDIFORD, ON POINT CONSULTING

TIMELINE DEVELOPMENT

2009
PROJECT DESIGN
Evolved from a communications piece to also be a staff reflection tool.

2010
IDENTIFYING DECISIONS
Created a process for staff reflection, stakeholder group input, and background research to identify key decisions.

2011
WEBSITE REDESIGN
Launched the timeline as an online tool as part of the Discovery website redesign.

2012
STAKEHOLDER INPUT
Though fewer stakeholders provided input as time went on, in-depth interviews provided a more nuanced perspective.

2013
"POINT PERSON" FOR EACH DECISION
Assigned a staff member to each decision. This "point person" helps to frame the decision, identify interviewees, and integrate multiple staff perspectives.

How it Began and How it Evolved

The Discovery Timeline began as a communications piece - a vehicle for describing the Discovery initiative and its major milestones. It was to be a descriptive brochure for staff to use at conferences, with the media, and with colleagues in the field and for Discovery community grantees to use to describe the initiative.

As the project unfolded, Memorial Fund staff became increasingly interested in using the timeline as a tool for reflection; for documenting what the Memorial Fund set out to do, how it evolved, and how the environment in which initiative decisions were made influenced learning and outcomes. The Memorial Fund also wanted to link strategy decisions with evidence-based outcomes.

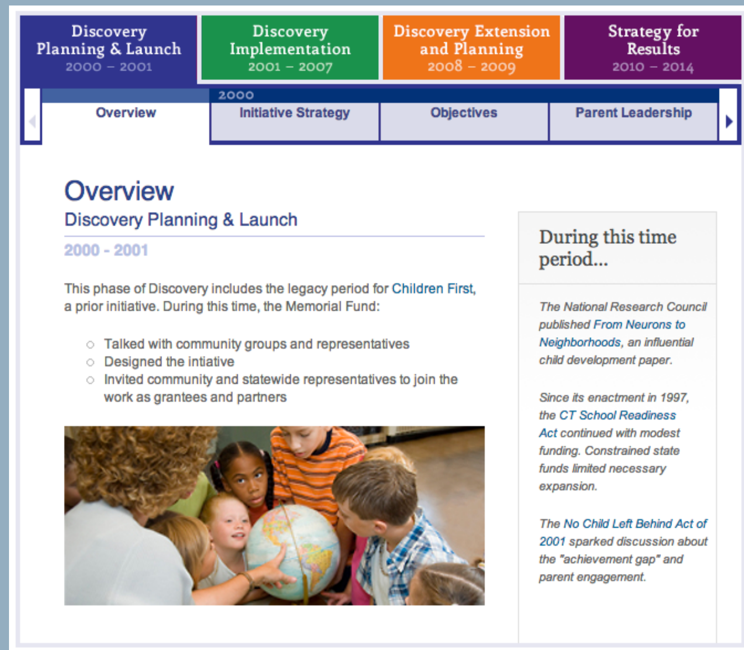
During this time, the Center for Assessment and Policy Development (CAPD) had been evaluating the Discovery initiative for several years. The Memorial Fund asked the evaluation team, Dr. Sam Stephens from CAPD and Donna Studdiford from On Point Consulting, to recast the timeline as a knowledge development tool. The project design included a reflective process for staff to develop a shared understanding and an online tool for presenting strategies, activities, and milestones and to describe how the work from earlier periods informed the next set of decisions. The timeline design allows users to get the "big picture," while "drilling down" to learn more about particular areas of interest and evidence.

Selecting the Key Decisions

The timeline project has developed into an annual opportunity for Memorial Fund staff to reflect about the key decisions, activities, and events of the prior period and how decisions are connected and how they have evolved. Though the task at these meetings is to identify key decision points, contextual events that occurred during the period, and learning and results that emerged from the decisions, the meetings

The Discovery Timeline provides a web-based opportunity to learn more about the history, events, and decisions of Discovery. Users can get a broad overview of each time period, or understand a particular decision or set of decisions in more depth. Each decision includes evidence-based and/or reflective findings in the learning and results boxes.

http://www.discovery.wcgmf.org/about/timeline



serve another purpose. The reflection sessions and the timeline development process create an opportunity for staff members to come together and reflect on their work as a whole and to see links between program areas.

To identify key decisions, the first step is a facilitated group brainstorming of the key activities and milestones from the prior period. This exercise typically yields dozens of decisions. The next step for the group is to categorize and organize the activities and milestones. Some are merged together. Others are categorized as learnings or outcomes, rather than a Memorial Fund decision.

Out of this process comes the beginning of a narrative. During the discussion, staff put the pieces of their work together and think about the full story, the context of the decision, and how to convey the staff's experience and learning.

Staff Interviews

Once the key decisions have been identified, there is a period of refinement, to frame the "story" behind the decision. Each decision has different dimensions and what is highlighted, how it is structured, and the length of the write up are key considerations.

Over time, the Memorial Fund process has evolved. Now, each decision has one or more "point person(s)" whose role is to provide more detail on the decision, determine whether it will be a short or long write up, identify stakeholder interviewees, and integrate multiple staff perspectives.

Typically, the point person is closest to the decision and has the greatest background knowledge of the decision and how it unfolded. This person is interviewed one or more times as the decision is being written and reviews the draft write up prior to the full staff review.

Stakeholder Input

The project design has included input from stakeholders during each cycle. Community collaborative members, Discovery liaisons, statewide grantees, and partners have had input on the decisions. In the first reflection process, in 2010, a diverse group was brought together to

"Our goal was to develop a tool that was flexible and accessible in many ways, given the depth and complexity of the initiative. By designing an online, interactive timeline, where users have multiple options to explore, learn and make conceptual connections, we reinforced the idea of building narratives around Discovery."

Lynn Koble, Timeline Tool Designer, Parasee Design

identify the key activities and milestones from each phase of the Discovery initiative and discuss other important "contextual" events that were occurring during the time period. Staff identified individuals outside of the organization who were closely involved with the work during the first 8 years of Discovery.

In the second phase, covering a somewhat shorter time period from 2009-2012, stakeholder input was more targeted. The decisions that would be explored were selected by the Memorial Fund. Individuals with detailed knowledge of the particular decisions were interviewed about that decision. This detailed input provided texture and a broader perspective. This approach has been used in subsequent annual timeline updates.

Telling the Story

In addition to hearing the story from multiple perspectives, lead researcher Donna Studdiford consults an array of documents for background information, from board meeting materials, grant applications and internal memos to grantee websites, newspaper articles and blogs. These materials help to shape the story.

Though the online tool provides a great opportunity to describe each individual decision in varying levels of depth, the writing style for online material is entirely different than for print material. Decisions need to be more concisely and clearly written and free of jargon. Paragraphs must be shorter and sentences less wordy.

The adjustment to the online version of the timeline was challenging, but ultimately allows for many more layers than a print version possibly could. Each decision has a short (2 paragraphs) description with a Learning and Results sidebar. Users can get more detailed information such as articles, public speeches, planning documents, and reports by clicking on links or downloading related files.

Staff select a subset of decisions to be written up as long descriptions, connected by a "read more" link under the short decision. The long descriptions, typically no more than a page or two, delve more deeply into the topic and provide more background and explanation of the decision.

Both short and long descriptions provide historical context that sheds light on how and why the decision was made, a description of the decision, and any next steps or developments. The sidebar area presents evidence-based learning and results.

Users can scroll between phases of the initiative and particular decisions. Going forward, the Memorial Fund hopes to be able to interlink key themes, allowing users to learn about how related decisions unfolded.

Challenges

Creating a reflection process that ultimately becomes a public statement about the decisions made and lessons learned throughout a multi-year, many faceted initiative is ambitious. Reducing key decisions with far reaching consequences into 2 paragraphs can be downright painful. Some specific challenges that have surfaced are described below.

What is a decision? Identifying what "counts" as a decision made by the Memorial Fund can be tricky. Sometimes, the decision is to fund an organization, but it is not the decision itself that is as interesting as the outcome of the organization's efforts. Other decisions relate to how staff resources are deployed. It is important to define what constitutes a decision and repeat this definition *each time* staff convene to reflect on decisions made in the prior time period.

When was the decision made? Though called a timeline, this tool is not exact in terms of when decisions were made. Technically, many decisions are made when the Trustees approve grants for a particular year or when a partnership is formally recognized. And yet, the decision to move in a particular direction or co-fund with a particular partner typically involves discussions that span months or years. And, when describing a decision made in 2009, it can be hard to separate out what happened in 2008 and what became apparent in 2010 from the 2009 decision. In truth, it can be difficult to pinpoint the exact moment when a decision was made. Contemplation, research, and discussion precede the decision and there is a period of implementation once the decision has been made. Participants in this process need to be at ease with a level of fluidity of time and understand that our view of the past is constantly changing, based on what is going on in the present.

Beyond these more substantive issues, the timeline drafting and revision process is very labor intensive. To get the true user experience, the text must be reviewed online. Capturing and implementing multiple rounds of edits from multiple staff members is time consuming.

Looking Forward

The Discovery Timeline is a work in process. Each iteration offers new insights about how to most effectively tell the Memorial Fund's story, as well as how to integrate the timeline work into a broader knowledge development strategy that includes both organizational and broader network learning.

Future plans for the timeline include not only content updates and navigational improvements, but creating new opportunities for stakeholder input.

"We wanted to engage visitors and provide an opportunity for them to "drill down" according to their level of interest. We also wanted a way to situate rigorous empirical work in the context of strategy decisions. We think the timeline works on both levels."

Angela Frusciante
Knowledge Development Officer, William Caspar Graustein Memorial Fund

"Graustein's timeline sets a high bar for those of us in the philanthropy world. The timeline not only encapsulates key knowledge of the board and staff. It also exemplifies the level of transparency and shared learning called for in our work."

Carrie Boron, organizational effectiveness and learning officer, Everyday Democracy