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Nonprofit Performance Management:
USING DATA TO MEASURE AND IMPROVE PROGRAMS

August 2014

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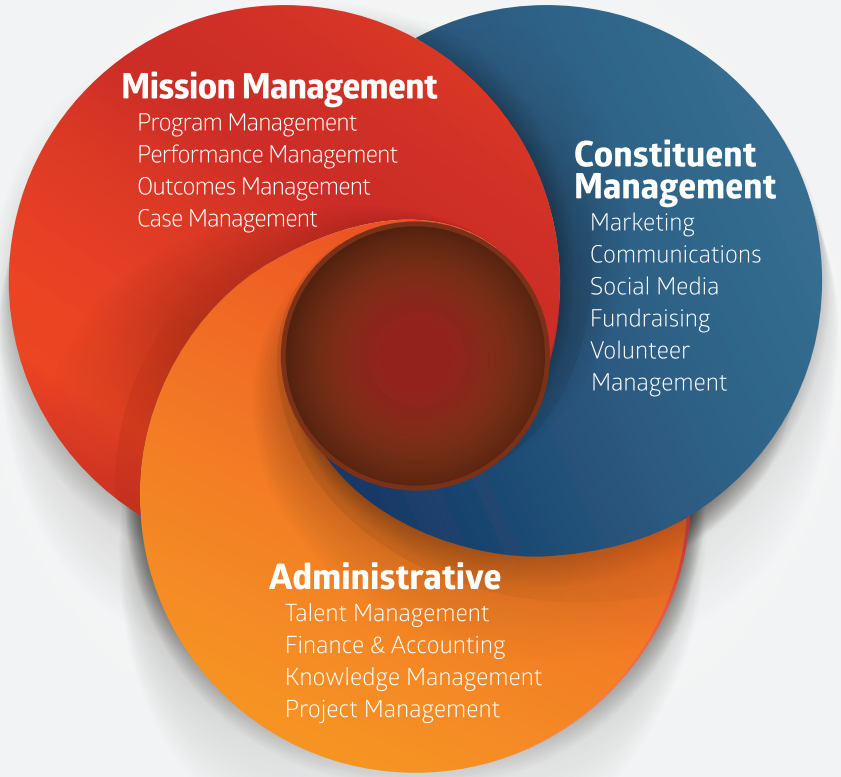

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ABOUT THIS REPORT

Idealware wrote this report with funding from Exponent Partners, a mission-based information technology consulting firm that helps nonprofits use information technology to carry out their missions more efficiently and effectively. The sponsor is a provider of systems used by at least one nonprofit Idealware spoke to for the report, and is a consultant for another organization, but had no input into the editorial content.

ABOUT IDEALWARE

Idealware, a 501(c)(3) nonprofit, provides thoroughly researched, impartial and accessible resources about software to help nonprofits make smart software decisions. Nonprofits maintain a complicated relationship with technology. Most know that software can streamline their processes and help fulfill their missions more efficiently and effectively, yet lean staffing and tight budgets mean they're unable to devote the time necessary keep up with new technologies and find the right tools.

We provide an authoritative online guide to the software that allows U.S. nonprofits—especially small ones—to be more effective. By synthesizing vast amounts of original research into credible and approachable information, Idealware helps nonprofits make the most of their time and financial resources. Our reports have been downloaded hundreds of thousands of times.

ABOUT THE AUTHORS

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FOREWORD

Every day, we work with organizations like yours to help track and automate data so that you can measure your results. Rooted in our mission as a B Corporation, we believe that the more your nonprofit is connected to results, the more you have the means to make greater change in the world.

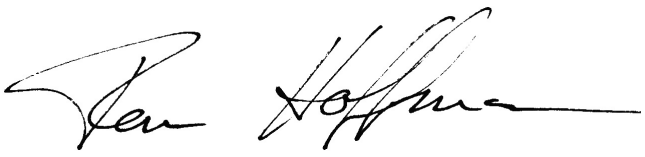
In the social sector, performance management and outcomes management are closely linked. Becoming a results-focused organization isn't an easy task to undertake—which is why we are excited to sponsor this report. If you follow this path, you will benefit from the clarity that data infuses in decision-making, and be rewarded with improved outcomes. Further, managing to measurable outcomes is an absolute necessity in today's competitive nonprofit landscape. Funders, donors, and social investors demand both stories and data together to describe your achievements.

As you get started managing data and results, you'll want to expand organizational capacity in three areas:

- **Learn.** Build knowledge about performance management disciplines, define your theory of change, and create your outcomes framework.
- **Build.** Start improving your data tracking, and then evolve your data systems to support performance management and outcomes data.
- **Adopt.** Instill outcomes thinking through leadership support, data-driven management, and cultural change.

As this report shows, your nonprofit colleagues are following a variety of paths on the outcomes management journey. Measurable performance, evidence-based practices, and rigorous evaluation are all hallmarks of a results-focused culture. Your successes in outcomes management create knowledge that advances the nonprofit community.

We encourage you to use this report as the impetus to start embracing an outcomes management mindset. By sharing our stories, knowledge, and results, we will collectively advance the social sector in a demonstrable, measurable way.



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INTRODUCTION

Tracking and measuring data can give nonprofits a better understanding of the populations they serve and how they serve them. It can also help them identify areas they can improve to boost the reach and effectiveness of their programs. But many organizations struggle with the idea of using data.

It's not always obvious how to make use of the things they track, or even to define what data they should be tracking. How do you collect and gather the information? How do you make sure it's consistent and reliable? How do you report on it and make it accessible to all the staff, partners, or community members who can benefit from it? Sharing data with clients or the public should be one of the goals for any organization looking to do more with data.

Such questions aren't the only barriers to using data to improve programs. All the same challenges nonprofits face in their day-to-day work apply to data, too: not enough staff or time; a lack of buy-in from staff or leadership; insufficient knowledge; competing demands or conflicting reporting requirements; and money or technology limitations.

Sound familiar? You're not alone. A few years ago, Idealware surveyed a number of nonprofits and found that fewer than two-thirds of those who responded were measuring program metrics in any significant way, and only about half were tracking outcome data for clients. Though we found that organizations with larger budgets—as well as most human services and health nonprofits—were more likely to be tracking and using data than other survey respondents, organizations of all sizes and budgets struggled to overcome obstacles.

We've also learned from our work with nonprofits that external demands and stakeholders—including funders; local, state and federal governments; donors; clients; and community groups—can distract organizations from making strategic use of program data they have collected.

The good news is that a good number of nonprofits are tracking financial and operations data and using it to make decisions about budgeting or programs. And we've been seeing more and more organizations using data successfully to improve their programs, which is the focus of this report. As the nonprofit world adopts an increasingly data-driven model, the expectation is that more and more nonprofits will embrace that model—and the fact is, data can help them in almost all aspects of their work.

How do those successful nonprofits go about the process of implementing their data practices? What software do they use? What are the obstacles they face, and how do they overcome them? To find out, we reached out to our network of experts and consultants for examples of organizations that were successfully using data to improve and direct their work, and narrowed their list of recommendations down to 10 nonprofits of different sizes, missions, and locations. We talked to staffers at each who were involved with data and analyzed the information we gathered for common themes, best practices, and any patterns that might be useful. We also asked them for advice for other organizations looking to replicate their successes and learn from their mistakes.

From those 10 organizations, we chose seven for case studies about the different ways they were using data. This report is built around those case studies and the additional conversations we had.

Want to learn how to move your organization toward a model of data-driven decision-making? Read on.

Talking About Data

Data is a buzzword on a lot of people's tongues these days, but not everyone knows what we're talking about. It's a confusing area, and we thought it might be helpful to clarify the vocabulary a bit so we're all on the same page.

By "data," we mean anything and everything from the names of the people you serve and how many of them pass through your programs to how many of your donors are also volunteers to the number of repeat attendees at your annual events. Data on its own is just trivia—it's only when you're able to analyze that data to measure something that it becomes useful. You're probably already tracking financial data about donors, grants, and other forms of revenue, for example, but for the sake of this report, we're mostly interested in data about your program activities and communications that can help you improve their effectiveness and expand your reach.

There are a number of ways to gather data. When we say "passive data collection," we're referring to methods that don't involve active manual input—for example, the analytics information you gather about your website, such as how many people visit and what devices they're using to view it.

You'll also hear the word "outcomes" used a lot, sometimes interchangeably with "output," but the two are very different. For nonprofits, outputs are programs, trainings, or other things with which you serve constituents or clients—essentially, they're the "products" of your organization. Outcomes refers to the results achieved through those outputs—all the knowledge you've passed on or the behaviors or situations you've changed.

"Indicators" are signs that point to the attainment of an outcome. "Metrics" are things you measure—the actual data you collect—for the indicators you've chosen. They usually involve a process of establishing what's critical to your success; identifying specific, quantifiable outputs you can do to achieve that success; and establishing some ideal definition of success as a target against which you can score your results.

"Performance Management" refers to actions you take to ensure you are meeting your goals effectively and efficiently. Basically, it's making sure you do what you said you were going to do, and then showing that you did it. When we use the term in the context of this report, we're referring to data-intensive monitoring of programs in order to measure ongoing and continuous improvement in the delivery of services and impact on the community.

USING DATA TO IMPROVE PROGRAMS

We already mentioned that data on its own is just trivia—it's only when you're able to analyze that data to measure something that it becomes useful. But that's only half the process. Once you've gathered and collected all that data and analyzed it, what are you going to do with it?

The end goal is to improve your organization's programs. Essentially, this involves identifying the types of data you can collect to best inform the decisions you make about your programs, and finding the best way to gather, store, report, and act on that data. Progress toward that goal is best thought of as falling on a spectrum or continuum—it's not as black and white as either you are integrating data into your decisions or you're *not*. Every organization uses data to make decisions in one way or another. You may not call it that, but every time you collect an email address or contact information, you're gathering data.

Some nonprofits have incorporated data so deeply into their cultures that a data-driven decision-making model drives much of their forward progress. These were the organizations we were interested in when we set out to research and write this report. We talked to organizations of varying sizes that had strategies around collecting data, including defining communications metrics to improve advocacy programs, evaluating programs using passive data collection, and using data to triage client services. Others were using data to make financial decisions about services and resources, to track and mobilize volunteers, and to benchmark their work or the work of their chapters and organizations in their network. We also spoke with nonprofits that were pulling information from external data sets to augment their own information or to compare their own work against as a means of measuring their own progress.

We learned that the framework for successfully using data to improve your programs generally involves six steps:

- **Defining a goal for your data.** Setting the overall goal for what you hope to improve or change—what will you do with what you learn?
- **Identifying data to gather to help you reach that goal.** Determining data points or information you can reasonably collect to inform the things you want to change.
- **Storing data in a way that's accessible.** Where will the data live—in a spreadsheet, program or case management software, a CRM system, or another database, for example—and who will have access to it?
- **Establishing a means of collecting data.** Establishing processes and methods for gathering information so that it is accurate, consistent, and usable—and so that it doesn't place undue burdens on the staff or volunteers collecting it.
- **Reporting and analyzing what the data is telling you.** Creating dashboards or other visualizations to display the data in way that makes it accessible, approachable, and actionable.
- **Acting on what you've learned.** How will you convert the data from knowledge to improvements for your programs?

Let's look at each of the steps in more detail.

Defining a Goal For Your Data

What do you want to do with your data? Parents for Public Schools, a national nonprofit with chapters in 13 states that works with parents to strengthen public education, set a goal of tracking people who had expressed interest in volunteering so that it could contact them when their services were needed. IT Director Julius Rainey worked with each of the state chapters to make sure they were all tracking the same basic contact information in a consistent way, and storing it in a central location.

Teach For All, a global network organization focused on solving education inequity through partnerships with more than 34 organizations around the world, tracks data to help those partners compare themselves against one each other—and against key benchmarks for other organizations of similar sizes. The International Youth Foundation uses a similar process to allow partner organizations in all parts of the world to compare progress.

"The intention is to give everyone access to everyone's data, so a project manager in Honduras could look at the results of a project in Egypt and compare notes," said Dan Oliver, the Director of Learning and Evaluations for IYF.

Your goals don't have to be big or complicated—they can be as simple as collecting email addresses from the people who use your services so you can better target communications to them—but they should be specific and achievable.

Identifying Data to Gather

Once you've established a goal, what data points can you reasonably track to help inform your progress toward it?

The Yale University Library administration performs an annual evaluation of the databases, journal subscriptions, and other electronic services it buys to provide to library patrons. "For each item, we ask what the overlap is, what's the cost per use, and if we drop this, would anybody care," said Sarah Tudesco, the Assessment Librarian. "Because we do so many things at the library, we spend millions and millions of dollars on these resources every year. It's a huge part of our collection budget."

With that goal defined, Sarah said the library is developing models to track "cost per use," or how much each item costs compared against how many people use it. Not all items can be compared against the same scale—some specialized resources are only used by a small audience, but are critically important to their work, she said. The library has a number of databases and reporting tools it uses to store and analyze all the data it collects, and during the annual reevaluation, it can draw on that analysis to choose what subscriptions to reacquire or seek out.

Identifying data points is not always as straightforward as it seems—and it's not always achievable to know what you want to know.

For example, Yale University Library staff have additional questions they'd like to be able to ask—like who, exactly, is using the resources—but so far, have been unable to. "Our tech infrastructure is set up so we can't track it at the level we want," Sarah said. "We can't necessarily track it to a demographics group—that's sort of the goal, the one thing everyone wants to do effectively. It's really hard, and it's a limitation around how we authenticate the resources."

Finding the right metrics to track was more straightforward for the Cara Project, a workforce development program that helps match people with quality jobs through a personal and professional transformation process.

"Given that our top-line outcome is permanent job placement, some of our metrics are more obvious," said Database Analyst Andrea Cote, "like how many placements, and descriptive elements of the job such as wage, hours, and benefits."

Staff also track the number of program participants who are eligible to sent out to find work as a way to measure its progress.

"We definitely use the data to identify any areas we want to change," she said. "If we're proposing program changes or have to shift our approach because of external or internal factors, we have a bunch of cases where we look to data to help support that. A lot of times the initial idea for change comes from someone observing something and thinking a change should be made. We'll then work together to see how our existing data supports that."

Andrea gave the example of student job placement—as a matter of practice, the organization used to shy away from placing clients in temporary jobs, but staff began to hear that employers were interested in a "try-before-you-buy" model of hiring temps to see how they fit before making them a full-time offer.

"We let ourselves start considering these opportunities as long as there was a path to full-time work," she said, "and then we used our data to see how many of these people were actually moving forward to long-term employment to decide whether it was worthwhile."

Storing Data in a Way That's Accessible

How will you store the data you gather? Who will have access to it? Julius Rainey faced this question when the Parents for Public Schools network hired him as IT Director. Though he convinced all 18 chapters to track the same data points consistently and accurately, he had to implement a Constituent Relationship Management database that each chapter could use to enter and store their names and to access them in a way that was useful.

You don't need expensive software to begin tracking data—you can store basic contact information or attendance records in Excel spreadsheets, for example, but as the volume of the data you track increases, you'll outgrow an unsophisticated system pretty quickly. A database that lets you store, access, and report on that data is a good investment.

The marketplace offers a lot of database options, including CRMs. For more information, read Idealware's article *A Few Good Constituent Relationship Management Tools* or download Idealware's free reports, *The Landscape of Salesforce for Nonprofits: A Report on the Current Marketplace for Apps* and *Understanding Software for Program Evaluation.*

Establishing a Means of Gathering Data

In addition to storing your data, a good database can also make it easier for staff and volunteers to enter it in a variety of ways, whether they're gathering it by hand and entering it manually or using complex RFID (Radio Frequency Identification) chips to automatically scan and count attendees at events.

At Parents for Public Schools, Julius is working with an app developer to create a QR code that interested volunteers can scan with their phones. The code will let them access a web form that collects their contact information rather than making them wait in line at an event to fill out a form.

For the New Orleans BlightSTAT program, field workers—property inspectors, title researchers, case workers, and others—can use mobile devices to remotely enter data into the system. Similarly, Teach For All lets staff at each of its partner organizations enter data through web forms linked to its database.

The Cara Project relies on staff to collect data—and making it easy for them can go a long way toward encouraging them to do their part to make sure the data is gathered and entered consistently. The organization is migrating to a new system that uses an app built on top of its Salesforce database to let them enter data on the fly, and built-in automation will remove some of the repetitive manual effort involved in data entry.

Ensuring your data is "clean" and entered consistently will save you time and work down the road, and ensure the accuracy of your measurements and comparisons.

But technological issues aren't the only ones to consider when implementing a plan like this. If you will rely on staff and volunteers to gather data, it's important to make sure they know how to do so—that means training them on how to use the software, tools, or paperwork.

Many of the organizations we spoke to pointed out that training them on how often isn't sufficient. You may still need to convince them *why* the data is valuable to get their buy-in, which can mean an extra step in their process or an additional drain on their time and resources. We'll look at that in more detail as well as other potential barriers in the next section.

Reporting and Analyzing What the Data is Telling You

In this stage of the process, you look to the what the data is telling you about how to improve your programs or extend your reach, or whatever your specific goal is.

For Exhale, a nonprofit that runs a telephone "help line" to support the emotional health and well-being of men and women after abortion, the goals were twofold—to make data available to staff when they need it, and to track progress against targets.

To meet both goals, the organization created quarterly dashboard reports staff can use to compare against historical data and make decisions about the future. For

example, if the organization's talk line doesn't get as many calls in one quarter as it expected, it can rethink the staffing levels or increase outreach. In addition, since Exhale is funded by foundations and individual donors, the dashboards let staff report on all the data they track to show funders that their money is having a real effect.

"If someone on staff is meeting with a program officer or a foundation, they don't need to get someone to pull that data for them—they can get it themselves by looking at a dashboard," said Danielle Thomas, Exhale's Senior Manager of National Programs. "It puts data at their fingertips."

Acting on What You've Learned

This stage is where the rubber meets the road. You've gone through the effort to identify and gather data. You've analyzed the reports to learn from that data. Now how do you convert it to actual, applicable change that can help you meet the goals you set out to accomplish?

In its effort to help global partners compare themselves against each other, Teach For All tracks more than 300 data points that organizations can use to inform their decisions about programs and communications. They use that data to better target and improve the services they provide.

To a similar end, five social services agencies came together to form the Chicago Benchmarking Collaborative with the idea of pooling all the data they were tracking individually about impact and outcomes as a means of comparing against each other. Now seven agencies strong, the Collaborative isn't just tracking outcomes—it's even using the same assessment tools, measures, and software.

"The whole purpose is that we compare data we get in collaboration meetings and compare results," said Traci Stanley, the Collaborative's project manager. "If one organization is getting better results, we want to learn why. What strategies are they using? What can *we* do to improve *our* programs?"

Whatever your organization's mission, there are a number of questions you should be asking yourself about how to most effectively and most efficiently serve constituents, target programs, and meet your goals. Data is the best way to answer them.

OVERCOMING BARRIERS

What obstacles and challenges do organizations face when trying to integrate data into their decision-making culture? In our conversations with successful nonprofits, we learned that most of the organizations we talked to faced the same barriers—often the same ones they face in other efforts, too, such as limited budgets or staff resources.

As the people ultimately responsible for gathering data in the field, soliciting it from attendees, and entering it into databases or other software, staff and volunteers were a common barrier. A number of organizations struggled to get staff and volunteers to actually gather data and enter it into the system in a way that is useful and reliable, while others struggled to get their buy-in.

We heard over and over that some staff did not understand the value of the data, others did not know how to use the software or other tools. Some felt the additional work required to gather or enter it was too much of a strain on their time.

Some organizations even said their staff worried that using data to make decisions might undermine their own judgment and expertise. But that's not the case, said Katie Silbiger, Program and Administrative Coordinator for Exhale.

"In the end it's still people evaluating the data, and you need to make sure you understand the context of the data—what it really means—and have a conversation around it," she said. "That puts the human element back in it."

Katie's coworker, Senior Manager of National Programs Danielle Thomas, said she's worked at other organizations beginning to shift from "anecdotal, story-based work to data-driven results," and saw people on both sides asking which approach was better. "I think the answer is both," she said. "Data does not make the human element less important—the human element can be more impactful with data behind it. You need to find the balance in those two things."

"Data does not make the human element less important—the human element can be more impactful with data behind it. You need to find the balance in those two things."

How do you overcome this obstacle? One way is training, which many of the successful nonprofits we talked to identified as a key step. Teaching people how to use the tools they need to meet their goals can help eliminate obstacles at this stage of the process.

"We had a massive learning curve to get people to enter the data and learn how to do it," said Oliver Wise, who ran the City of New Orleans' BlightSTAT program. "We're still ironing out lots of kinks. User adoption is a major challenge in any project like this."

Parents for Public Schools' IT Director Julius Rainey wrote a guide to help walk staff and volunteers through the process of gathering data, and hired the vendor of the database his organization used to provide training on how to use the tool to do so consistently and appropriately. Similarly, the Chicago Benchmarking Collaborative put its staffers through an "Outcomes 101" training that got them all speaking the same language about what data to track and how to make sense of it.

Beyond training, it's important to bring staff and volunteers on board and earn their buy-in by demonstrating the value of the data—not just to the organization, but to their own individual work and roles.

Because Exhale relies on volunteers to staff its national telephone talk line, convincing them to log the calls—an extra step for them to complete—can be a lot to ask of unpaid workers. Staff worked to make data part of the organizational culture, and trained the volunteers to show them the value it could bring to their work. "Now we let them know that someone is looking at that stuff," Danielle said. "People have really appreciated that."

The organization also makes the data available to whoever needs it, when they need it. All the data is there and accessible at any time to help inform their work, and it's reported in dashboards and presented to volunteers at quarterly meetings. When they saw the data representing all the things they'd entered after each telephone call they'd fielded, they were "blown away," Danielle said. The reports give staff a way to show the volunteers the tangible results of their work, such as how many callers they've helped, and gives them something to feel proud about.

For the Cara Project, prioritizing data and metrics from the top down has helped engage staff at all levels.

"One way we overcome the natural burden that comes with data entry is at a leadership level," Database Analyst Andrea Cote said. "Metrics are used as the basis for every team meeting. It's not a punitive culture where people not meeting certain metrics are punished, but it's part of the culture here. That's so important."

Staff use data in promotional materials and communications with key stakeholders, and seeing the organization celebrate their success helps motivate them, she said. For every job placement the organization makes, staff get an email highlighting that person's experience and story and noting the overall progress toward the placements target.

"It helps to underscore for staff that they're not just entering data to enter data, but that it's being used to show progress," Andrea said.

Yale University Library Assessment Librarian Sarah Tudesco said her organization sought to find a "sustainable way" for staff to gather the necessary data, making it an inobtrusive, manageable part of their daily routines.

Similarly, Andrew Ho said Teach For All faces an ongoing challenge overcoming the human barrier with 34 organizations in its network, because gathering data can be "onerous and time-consuming," he said, adding that the organization has been trying to streamline with each iteration of the process.

He said many of the network's organizations want to see the other organizations' data, but aren't willing to share their own. "It's only as powerful as the data people submit," he said. To combat their reluctance, the organization uses a business intelligence tool to create easy-to-read visualizations that let each organization in the network compare itself against the others in almost-real-time. He hopes that showing the value of the data will make gathering it more attractive.

"In other words," he said, "just show them that it works."

Human challenges aren't the only ones for organizations to overcome—technology can be a barrier to success, as well. Not having a database, or having one insufficient to meet your needs now or in the near future will slow you down or prevent you from meeting your goals.

The seven agencies in the Chicago Benchmark Collaborative sought cost efficiencies by sharing software, and chose a database that was extremely customizable to their varied needs while being flexible enough to support so many different organizations. Each signed a Memorandum of Agreement about what would need to be entered into the system to report on outcomes, and then created written "blueprints" as instructions for the vendor.

The City of New Orleans launched its BlightSTAT program on a database inherited from the previous administration, but as the program gathered momentum, it implemented a new system designed around the workflows it needed to support.

"We hired someone outside our IT department who is on the ground doing a lot of adjustments and configurations and workflow mapping to make it easier," former Policy Director Oliver Wise said. "He was really instrumental in understanding the users' needs and adapting to them."

When Julius Rainey had to select and implement a Constituent Relationship Management system for Parents for Public Schools, he looked at a number before settling on one from a vendor that offered solid tech support. That vendor also extensively customized the system to fit his needs in a way he wasn't confident other vendors could.

"The cost wasn't so bad, either," he said.

For more information about choosing the right software for your organization, read Idealware's article *A Few Good Constituent Relationship Management Tools* or download Idealware's free reports, *The Landscape of Salesforce for Nonprofits: A Report on the Current Marketplace for Apps* and *Understanding Software for Program Evaluation.*

SUCCESSFUL DATA PRACTICES

We chose the organizations we would speak to because they'd all been successful in their efforts to use data to measure and improve their programs. They'd all faced and overcome barriers and implemented changes at their nonprofits based on what they'd learned from the data they tracked, so we asked them for advice.

What would they tell another nonprofit looking to incorporate a data-based model to help improve their programs? We found a few common answers that we've compiled below.

Don't Be Afraid to Start

Launching a data project can be intimidating. Sometimes it's difficult to know where to even get started. Don't let that hesitation become an obstacle—jump right in, said Oliver Wise, who ran the BlightSTAT program.

"Get started and start counting stuff, and don't get too worried about getting it absolutely perfectly right," he said. "It's about getting a viable product out the door and giving yourself the room to improve on that. For us, this is a regular means to check in on whether we're doing what we said we would do—that's helpful to any organization. Then you can start to ask more and more sophisticated questions."

Because data can be overwhelming, the Cara Project's Andrea Cote said organizations can start by maximizing the way they use the data they're already gathering.

"Think about what you already collect, maybe in paper forms or in a scattered way," she said. "Get someone on staff who is good at organizing or find a volunteer who can help you think of a coordinated way to track those things in one place, even an Excel spreadsheet, so you're putting to use what you're already collecting. Consider what the point of it all is. What are you ultimately trying to do? Then consider what the meaningful data points are to get you there."

Get Stakeholder Buy-In

No data project can succeed without the buy-in of all stakeholders, from the volunteers and staff who will be collecting and entering the data to the leadership of the organization. Having all levels of the organization on board can give a project momentum. The converse is also true—not having everyone on board can create obstacles at every stage of the process.

The value of getting buy-in can even extend to your funders. One staffer told us he's seen foundations push back on proposals and increase the amount of money budgeted for data tracking because they recognized the value it could bring to the organization and the project.

"That's the current narrative, especially for those grants funded by taxpayers," he said. "Instead of pushback from donors, we're seeing them asking for additional energy to be spent on monitoring and evaluations."

Keep People Engaged

Getting buy-in is one thing, but how do you keep people engaged with data—and the often increasing demands of gathering and analyzing it—so the process is sustainable?

"Demonstrate that, by being focused on data, you're making someone's job easier," said Dan Oliver, Director of Learning and Evaluations for IYF. "Whether they're higher or lower in the food chain, an external partner—just show that you're somehow making the work easier for someone."

Find Someone to Champion Your Project

A data "champion"—someone passionate about the value of data—can help lead an effort, secure buy-in from staff and leadership, and find clear paths to success despite barriers and obstacles.

"Having a champion is important," Sarah Tudesco of the Yale University Library said. "I think it definitely is." She sees her own role as taking the big picture view and helping make the connections between the work people do in all of the different departments.

"They all know their own roles well, but they don't always know how it affects other departments," she said. "It helps to have a person to guide them."

Oliver Wise championed his own project, leading the charge to use data to support the mayor's initiative to reduce blighted properties. When that proved successful, he pushed to incorporate data into more areas of the city's work. The city procured resources to build a full-time professional performance management department that he now heads as Director of the New Orleans Office of Performance and Accountability, leading five full-time analysts that run programs similar to BlightSTAT.

Your champion doesn't have to be someone in a leadership position—enthusiasm and support are valuable at any level—but having someone with the ability to make things happen can go a long way toward overcoming obstacles.

Choose Data You Can Use

A lot of organizations still perceive data as a burden, said Teach for All's Andrew Ho. The key to successful data projects is to find "a better way to leverage the organization and its power so you're not just collecting data for the sake of collecting data."

His advice is to think through the best way to show how your organization is making an impact, and to think through measurements beyond just the things funders or potential donors are asking for.

Julius at Parents for Public Schools said he talked to every chapter in the organization's network prior to deciding on a database. He wanted to be sure he understood what data was being collected and what data the organization thought *should* be collected.

Be thoughtful. Choose data points that will inform your goals, not just those that you think might be interesting. Quality is far better than quantity, and too much data can overwhelm the people who gather and analyze it, and can clutter reports. A database full of information that you can't use is worthless, but a couple of simple data points can help you better target your services.

Make Data Part of the Culture

Nearly every organization told us their projects had really begun to gain momentum when data became part of the culture. Making data collection and reporting a regular part of meetings, decisions, and all aspects of your work can create familiarity and acceptance so that using data becomes second nature.

For more information about how to make data part of the culture rather than an afterthought or something that needs to be defended or justified, download *Getting Started With Data-Driven Decision Making,* an NTEN workbook prepared by Idealware.

Fund the Project Appropriately

Not all data processes need funding—you can improve a number of aspects of your daily work and programs by making better use of the data you're already collecting, or by making better use of existing resources to gather more data. But if your project is big or complex enough to require a budget, make sure you do what you can to fund it appropriately and keep it funded, said Dan Oliver.

"Fundamentally, what we've struggled most with is funding," he said. "You have to get a decent level of committed funding to support this kind of stuff. The donors are talking about it and asking a lot for it, but if you don't put a dedicated line in your budgets, it's really difficult to pull it off. You have to beg, borrow, or steal to get support for it."

Clean Your Data

Clean data means that it's entered accurately and consistently across all staff or volunteers so that, when you search it, you're able to find what you're looking for. Data hygiene is a time-consuming process, and can't always fix past errors—you're better off starting with data that's been entered correctly.

"At one time, we had chapters just collecting first names, or email addresses, or just first and last names and no email addresses," said Parents for Public Schools' Julius Rainey. "We had to come up with ways to standardize that."

To that end, he convinced the leadership and board that policies needed to be written to require certain data to be tracked. Then he wrote a guide to using the system and worked with the vendor to train chapter staff and volunteers. He also plans refresher trainings, because different questions arise after staff and volunteers have a chance to use the system in real life instead of just in the classroom, he said.

"I had to keep talking to my boss because she didn't understand," Julius said. "We should be collecting data to make sure we're healthy and viable, just like they monitor a baby in the ICU."

CASE STUDIES

Exhale

- *Oakland, California*

A nonprofit working to change the national conversation about abortion tracks information about calls to its volunteer-staffed talk line to help improve performance and demonstrate the organization's impact to its volunteers.

Exhale is a national organization founded to address the emotional health and well-being of both women and men after abortion. Founded in 2000, the organization provides and promotes emotional support across a dynamic landscape of private and public spaces, both on- and offline. It adheres to the tenets of what it calls "pro-voice," an approach to "creating a social climate where each person's unique experience with abortion is supported, respected, and free from stigma."

One of Exhale's major programs is a free national talk line. Staffed by volunteers who provide emotional support, resources, and information to women who have had abortions as well as to their partners, family, and friends, the confidential service is available in multiple language.

Volunteers undergo a 60-hour training course to become talk line counselors, said Danielle Thomas, the organization's Senior Manager of National Programs. Once qualified, they work from their own homes in different geographic areas of the country, though the organization and its five staff members are based in Oakland, California, and the majority of volunteers—about 40 at any given time—are local. An answering service routes calls to their phones.

After each call, they complete a form that collects data about the nature of the call and topics discussed, the type of abortion and how long ago it happened, whether it's the caller's first contact with Exhale, how they learned about the organization, and any demographic information they volunteer (though none is solicited or required). Forms are completed using a web browser, and the data is stored in the organization's Salesforce database.

Katie Silbiger, the Program and Administrative Coordinator, builds custom dashboards in Salesforce that let staff access up-to-date data from the forms to monitor things like spikes in a certain type of call, for example. The dashboards are also shared with volunteers at quarterly meetings, which shows them the tangible results of their work—such as how many callers they've helped—and gives them something to feel proud about.

Staff are able to use the dashboards to look at quarterly and historic information to track top-line activity, she said—for example, if the talk line doesn't receive as many calls in a quarter as expected, they can consider doing more outreach or staffing adjustments.

They're also used to report to the foundations and individual donors that provide most of Exhale's funding, replacing paper reports. Danielle said the organization has taken the lead with foundations and shown them what it thinks is important, and what's important to track. That's enabled them to track data that foundations want, but also to be in a position to track the data staff values throughout the year rather than limiting it to grantwriting periods, she said.

"We're looking at lots and lots of data at our fingertips," Danielle said. "If someone on staff is meeting with a program officer or a foundation, they don't need to get someone to pull that data for them—they can get it themselves by looking at a dashboard."

Democratizing the data—making it available to whoever needs it without requiring that they go through a data gatekeeper—has led to an overwhelmingly positive response from staff and volunteers both.

In addition, the organization uses the data to benchmark itself against other organizations, Danielle said, but that only goes so far as a model. "We could compare our talk line data to another talk line," she said, "but that wouldn't necessarily inform our work in terms of, 'Oh, they're getting more calls, we should try to get more calls too.'"

There are better metrics that can help it improve its work, she said, and the organization is always tinkering with the data it collects and track. Having that data has freed up staff time to think more critically about things it wasn't able to in the past.

"It gets creativity flowing," Danielle said. "All the work on the talk line is based on a one-on-one conversation. As much as we try to capture that in a call form or description of the call, there's so much nuance that happens in those conversations that there's no data that can capture what that experience is like. That's where I think data runs short, or isn't helpful. How do we translate that narrative or experience in a way that's helpful?"

It says something about the organization that it uses data in so many ways, and that staff devote so much energy to thinking about how to better use it. In general, Katie said, the organization as a whole has adopted a culture of making decisions based on data, with little to no resistance. And though she's heard the common arguments against it—that it can remove the human element from the work—she said they don't apply at Exhale.

"We're sort of in a unique position because we're located in the Bay Area, where being a data nerd is a very popular thing," she said. "So, everyone here is on board with data. The more you know, the more you can do—the more you can evaluate yourself. If your data is removing the human element, it's not the best data. In the end, it's still people evaluating the data, and you need to make sure you understand the context of the data—what really means—and have a conversation around it. That puts the human element back in it."

Danielle said she's worked at other organizations where the conversation was still moving from anecdotal, story-based work to data-driven results, and said people on both sides want to know which approach is better.

"I think the answer is both," she said. "Data does not make the human element less important—the human element can be more impactful with data behind it. You need to find the balance in those two things."

While convincing so many volunteers to enter so much data in the call forms could also be an obstacle—entering the data is an extra step for them to complete, which can be a lot to ask unpaid workers—Exhale has found that not to be the case.

"Because a lot of our data is provided by volunteers—rather than staff, where part of their performance evaluation might be how much data they entered—the thought is that puts us in a position where we have less data or our data isn't great," Danielle said. "But something we've seen over the last two years is that our volunteers have continually been better and better about entering data in a timely way."

The organization shifted from asking volunteers to enter data and hoping they did to making it part of the organizational culture and training them to show the value of the data.

"Now we let them know that someone is looking at that stuff, and if they don't enter it, we're going to ask about it and remind them," she said. "People have really appreciated that."

A side benefit of the data collection that the staff did not anticipate is that volunteers have said they see the call form as an outlet for them to find closure around each experience and conversation. "There's data we're getting from it—information from the calls—but we've found it to be really helpful for volunteers to be able to let the call go."

Yale University Library

- *New Haven, Connecticut*

A traditional academic library tracks how patrons use its digital resources to evaluate and better allocate its subscription budget.

In some ways, libraries were the very first databases—massive repositories of searchable, accessible information. The nature of their work cataloging resources means they've also been using data longer than most organizations, said Sarah Tudesco, Assessment Librarian for the Yale University Library.

"There's always been a tradition where libraries collect data, submit it, and compare it—it's been going on for 90-plus years," she said. "But because of the changing nature of the library environment, it's not always as relevant as it could be."

Traditionally, libraries tracked such measures as the total number of physical volumes at the library, she said, a quantifiable way of tracking purely "how much stuff is on your shelf." But with the advent of digital items, the reality is that a lot of what libraries now acquire is no longer physical—though it still costs money and effort to acquire it. The model has changed.

"That may have been a good idea of how rich your resources were in 1950, but not now," Sarah said. "So there was a lot of data collection but not always cutting edge, and now there's a lot of digital resources—we very much live in two worlds." When she joined the library last year, she saw an opportunity to guide it through the process of bridging those two worlds.

"My goal was to help the library with the sort of mantra of how to use data more effectively to make good decisions, and with the whole culture of data-driven decision-making," she said—to look for ways we can use data to shape our programs, our budget, etc..."

Each year, the library spends millions of dollars on electronic journals and subscriptions, but had no way of knowing if enough people were using them to justify the expense. Sarah faced a similar challenge at the Harvard Library, where she worked before joining the Yale University Library. There, staff were able to track financial data about what the library acquired, what it bought, and what it was spending on back resources, for example, as well as data from other systems about usage.

"We had an integrated library catalog of all our stuff, both physical and virtual, and a lot of data to show what type of things are moving through the library in our consortium agreements with other libraries," she said. At Yale, she's been working on bringing similar financial and usage data together so staff can look at a comprehensive bird's eye view of collections and their cost. If it looks like material from one vendor is being used a lot in certain subject areas, for example, the library could pour more money into it while spending less on an underused resource.

"We're exploring trying to find the best measures," Sarah said. "There's a balance there. We may not know what it is yet, but we're trying to find it so we can track it down the road."

Each year the library reevaluates the databases, journal subscriptions, and other electronic resources it buys.

"For each item, we ask what the overlap is, what's the cost per use, and if we drop this, would anybody care," she said. "Because we do so many things at the library, we spend millions and millions of dollars on these resources every year. It's a huge part of our collection budget."

The library is developing models to track "cost per use," or how much each item costs compared against how many people use it. Not all items can be compared against the same scale—some specialized resources are only used by a small audience, but are critically important to their work, she said. For such items, the cost per use will be more, but the threshold is higher.

"Because a lot of what we do is virtual now, we'd like to be better able to track our web site and electronic uses by demographics—which ones are faculty using, which ones grad students in the management program are using, etc... We know how much things are being used, but not who's using them."

A lot of libraries rely on "gatecounting," or tracking the number of people who walk through their doors or use certain resources, as a means of measuring their use. At Harvard, library patrons were required to swipe identification cards everywhere they went, and their demographic information was stored in a database that tracked everything from who walked through the door and their status on campus to their major. And Sarah recently spoke to a librarian from another library at which patrons are required to swipe their identification card at the reference desk before they ask a question about the library's resources.

The Yale University Library doesn't have the infrastructure to support that kind of gatecounting, she said, but as it undergoes a renovation, staff are looking at installing a number of measures to make it possible, including infrared tools to track how many people enter and exit.

Right now, all library lives in a number of different databases, including an old Oracle database and Excel spreadsheets. Sarah is exploring new data visualization tools like Tableau and Microsoft's business intelligence suite to facilitate reporting for all the staff members who use the data.

"A lot of staff use data, but we could have more," she said. "The inhibitor is not that we're restricting the data, but the tools themselves—there's a high learning curve. We have a few 'power reporters,' and I'm here to help with that to make it better, but there are still some restrictions when it comes to accessing data."

Despite the long relationship between libraries and data, Sarah said, not all librarians embrace the effort.

"We do a lot of data collection that requires staff input, like all our public outreach activities," she said. "There's a core group of librarians tracking every time they do an event or some-

thing. Some of them are active about tracking that data, and some are not." The extra steps required of staff to collect the data "interrupts their flow," she said, and the inconsistent data gathering can lead to inaccurate results.

"We need to find the middle ground," she said. "If we demand too much data, we're not going to get a good amount, so I look for ways to find data that we might not already be capturing... and ways to integrate it into the flow so it happens in the background instead of being a burden. It's less time-consuming, and then they're more likely to do it."

The library is a large, traditional academic library—"very old school," Sarah said, "with a lot of history, millions of volumes, and a very interesting environment with many silos of information that don't always talk to each other well." She sees her role as taking the big picture view and helping make the connections between the work people do in the different departments. They all know their own roles well, but they don't always know how it affects other departments, she said.

Staff have a lot of data at hand to help track those relationships.

"They don't always know how to start," she said, "because there's so much of it. It helps to have a person to guide them."

Teach For All

- *New York, New York*

A global networking organization focused on solving education inequity lets its partners compare themselves against each other using more than 300 data points to improve their effectiveness and reach.

Teach For All is a global network organization focused on solving education inequity around the world. It works with 34 national organizations to try to close the education gap in their respective countries by bringing in the best possible people to become teachers and getting them active in their roles. The most obvious organization is Teach For America, but the others span all continents except Antarctica.

The way the model works, rather than reaching out and recruiting for an organization in a country, Teach for All waits for someone from that country with strong ideas to initiate the program.

"We'll help them through those early stage years, and when they reach a threshold, they'll sign an agreement and become part of our network," said Andrew Ho, Senior Director of Information Technology. "We then work with all our partners, providing advisory services through the entire spectrum of their work—how to recruit teachers, build strong government relations, raise money, grow and nurture alumni community, finance, and IT."

With so many organizations spread out across the network, Teach for All tracks a lot of data points—more than 300, he said, "and yet, we could be doing way more"—through its "Global Data System." Partners can use that system to compare themselves to the others, as well as to key benchmarks for other organizations of similar sizes. For example, Andrew said, Teach for America can compare itself against Teach for Estonia in a variety of data points, including the number of first-year teachers, number of students reached by the program, the number of alumni still teaching, subjects offered, annual operating expenditures, survey data collected from staff and alumni, and more.

Kristi Phillips was Teach For All's director of data management when the organization undertook this project (she's now an account manager for Exponent Partners, the consulting firm that sponsored this report). The multiyear process was already under way when she joined in 2010, she said, with the impetus of helping partners understand what others partners were doing.

The overall vision was driven by a desire to use the Global Data System as a tool to help new member organizations grow and scale themselves, she said. By taking such factors as the country's Gross Domestic Product, population, and size into account, it lets them compare against other organizations in the network to set feasible and achievable goals.

"This data is a lever for gauging organizational impact," Kristi said. "Can the organization have an impact in that country? How do we grow? In terms of number of cities or program size in a state, or in terms of however they're measuring achievement? There were some very basic questions partners wanted answers to, and those questions were being asked on a one-off basis. There was an opportunity to centralize collection of that information and share it out in a more systematic way."

The answers to those questions were valuable pieces of data for Teach For All staff supporting partners in a variety of areas, from recruitment to fundraising to training, she said.

The technology and the process improved over time. Initially, Andrew said, the data was captured in spreadsheets that each partner organization would email to a staff member at TFA, who would then transfer it to a master spreadsheet—a "ridiculously time-consuming" process.

That system lacked the ability to sort and display the data in a way that best served the growing network, Kristi said, as it didn't let users look at multiple countries or variables at the same time. The organization began to explore other tools to be able to display models and eventually settled on the Birst business intelligence tool. Since then, it has continued to make improvements and enhancements, including connecting Birst to the Salesforce database.

"We needed two pieces to that pie—the end-user experience of graphs and charts and pretty pictures, and a data warehouse for Teach For All recordkeeping," she said. "The last enhancement was connecting it to Salesforce."

Teach For All worked with Exponent Partners to configure the analytic tools to the database. Now, reporting is done real-time rather than twice a year to allow users to update the system with new data at any time, Andrew said. "The idea is that, as they get updated information for every metric, they can enter it immediately and it will be displayed within 24 hours."

Teach for All is trying to streamline things even further by building a knowledge management portal that lets users look up information on key topics and search for everything from Word docs and spreadsheets to videos, photos, and data. The plan even includes embedding Birst visualizations in the portal so users will no longer have to log in to Birst to see them.

With so many organizations in the network spread out across so much distance, the human element remains an ongoing challenge, Andrew said, though not so much with the newer organizations but the larger, older ones.

"People find it onerous and time consuming," he said. "We've been doing our best to streamline with each iteration of the process." One of the challenges is what he calls a "prisoner's dilemma," in which everyone wants to see the data, but not all organizations are willing to share their own.

"It's only as powerful as the data people submit," Andrew said. "A few years ago, we had only a few organizations submitting, and we had to have a full court press about it. The people complaining about the data being useless were the ones not submitting it. I think we can streamline it further. It's still a lot to ask people to do—we're still, as an organization, trying to figure out what's most useful and what's not, and how best to collect it."

Kristi said the organization spent a lot of time talking about the rollout in advance, and said it's still "not a finished story."

"We took very much a train-the-trainer approach to rolling it out to our global partner network," she said. "My team led a series of trainings for the different teams and for our partner-facing team, the people who had a direct connection to partners on the ground. We did a very specific training for them so they were able to use the tools and templates, and then we facilitated a template they could use."

With so much data being collected, there's the possibility of it becoming burdensome to the organization—both in terms of how to gather and collect the data, and how to make sense of the reporting, she said.

"We did a lot of painting the picture with examples of how the tool could be useful," she said, "with a lot of use-case training and information about how to use the system."

The data points collected have evolved over the last three or four years so that they're very consistent across all partners, Andrew said. That's been a deliberate process that involved focus groups of partners and staff members from Teach for All as well as user groups that had very different interests in what the right data was.

"The partner team needed different data than fundraising did, and a partner itself might want a third set of data," Kristi said. "We did a lot of focus groups and created master lists and tried to whittle it down to 'What's s the most critical?' We wanted to avoid having a list of 700 things that becomes so burdensome to partners to share that they end up not sharing it."

The organization also uses some external data sets to compare its data against census-type information to measure whether it's making an impact in that country.

Despite the data culture it's fostered among partners, the organization has made less progress with its own 100 staff members, Andrew said, with data lagging behind internally. He likened it to "the cobbler's kids not having any shoes."

"We're tracking a lot of stuff internally that were on the docket for the end of this year, but haven't had the resources to focus on it," he said. "One area we do a good job is on the donor management side. We've been using Salesforce there, but anything outside that realm, we know the data exists in heads and email and spreadsheets but need to do a better job of consolidating. Internally, it's not a human element obstacle so much as a focus and resource thing."

Andrew said a lot of organizations still perceive data as a burden, and the key is to find a better way to leverage the organization and its power "so it's not just collecting data for the sake of collecting data." His advice to other organizations is to think through the best way to show how the organization is making an impact and measurements beyond just the information potential donors or current funders are asking for.

What's Andrew's advice for getting staff buy-in?

"Just show them that it works," he said.

Parents For Public Schools

- *Jackson, Mississippi*

A national nonprofit overcomes technological and staffing limitations to roll out consistent data-tracking initiatives to its 18 chapters.

Parents for Public Schools (PPS) is a national nonprofit with 18 chapters in 13 states that works with parents to strengthen public education. Each chapter functions as a standalone organization to carry out the national organization's mission, but the majority of chapters—15 of them—are all-volunteer-staffed.

Data could provide an effective way for the national organization to track progress across chapters, and to provide a means for each chapter to benchmark itself against others as a way to improve effectiveness. But that kind of measurement requires two things: a good tool for tracking and storing data, and the ability and willingness of staff to participate.

PPS faced obstacles in both areas. Because so many of the chapters are staffed entirely by volunteers, getting them on board with the additional effort involved in tracking and entering data posed a challenge. And the software problem was even bigger—only a couple of the chapters had any kind of database to track programs and services in place.

That was the situation Julius Rainey found when he took over as IT Director for the national organization. He's found ways to overcome both obstacles, and has helped lead PPS toward a more data-driven model.

"One of the things we know is, when you have volunteer-driven organizations and chapters, there's a high turnover of leadership," Julius said. "When leaders transition, they sometimes forget to even pass that data along, so sometimes a chapter has to start over from scratch."

Each chapter would store the various data it tracked in a scattershot way, on individual spreadsheets on different computers, and when new volunteers would come in or leadership changed, that information did not get compiled or aggregated. In addition, older chapters suffered from what he called "founders' syndrome," in that they'd been doing things a certain way for so long that they weren't immediately open to the idea of change—including using a CRM.

"Ten years down the road, if I'm not here, they can look at the CRM and see that consistency in the data," he said. "That's important."

Julius looked at a number of systems, but settled on one built by The Databank for a few reasons. The vendor offered solid tech support, and as the only IT staffer, he needed help managing and maintaining the system for so many chapters and for the staff at the national PPS office that would use it. In addition, the vendor customized the system to fit his needs in a way he wasn't confident other vendors could.

"Because we have the chapter model, we needed each chapter to be able to access only their own records," he said. "The Databank was able to do that for all 18 chapters—administrators and I can see everything in the system, but they can see only their own records."

Julius said the system was "the closest thing to a one-stop-shopping CRM" for his organization's particular needs, which included being able to capture and track volunteers for each chapter who were willing to attend school board meetings and contact them by text message.

There was a third reason, as well. "The cost wasn't so bad, either," he said.

With a new system in place, he began the long process of bringing chapters on board with the new process.

"I talked to every chapter, I interviewed everyone to make sure I understood what data they were collecting and what data we thought they should collect," he said. "At one time we had chapters just collecting first names or email addresses, or just first and last name—we had to come up with ways to standardize that."

To that end, he convinced the leadership and board that policies needed to be written to require certain data to be tracked. Then he wrote a guide to using the system and worked with the vendor to train chapter staff and volunteers. He also planned refresher trainings, because different questions arise after staff and volunteers have a chance to use the system in real life instead of just in the classroom, he said.

"We wanted to start them out with understanding the importance of having your volunteers' basic contact information in one location," he said, "so we're tracking that. And currently we're tracking volunteer interest in the schools so we can target communications. But we're not tracking any data that helps us to determine our strategies for our work—we haven't gotten there yet. We can't put all that on them at once, but for now we're starting with things like how you take things from sign in sheets to enter the data into the system."

Those are goals for down the road, Julius said, as he sees this as just the first phase of the organization's embrace of data. "It's the bare minimum," he said, "knowing who you're talking to and how many of them are connected through (each chapter's) school district. Then we'll take it to the next level."

The system creates dashboards for users to see when they log in. Since PPS also uses the software for donations, Julius is able to generate reports that show connections between events and donations.

In the next phase of the project, he's hoping to find a way to make it easier to collect data in the field—maybe QR codes posted at events so that parents interested in volunteering can scan the code to access a form to fill out rather than waiting in line or entering the information manually, for example. He's also looking to set up a means of enabling staff or chapter volunteers to use cell phones to capture data in the field, and has found a survey tool that will let users enter data they're currently using a spreadsheet for that he hopes to implement soon.

His overall goal is to make the organization "completely data-driven," he said, from web analytics to social media and everything in between.

"Phase one and two is about making sure the work we're doing is having an impact, and if not, how do we change strategy to make sure we are?" he said. "But communications and marketing are definitely important to our organization, so my next phase is getting a better understanding about web and social media analytics to better push the word out about what we're doing. If we're not understanding what we're doing at a national level, then what are we really doing?"

Chicago Benchmarking Collaborative

- *Chicago, Illinois*

Social service agencies come together to share software and metrics to benchmark as a group for a true apples-to-apples comparison.

The Chicago Benchmarking Collaborative, launched in 2009, is an alliance of seven education and human service agencies that collectively work with more than 12,000 low-income individuals throughout some of Chicago's most underserved neighborhoods. Christopher House—a nonprofit that partners with families to provide innovative schools for students from birth through high school and adult education—acts as the project manager for the collaborative, with Director of Quality Assurance Traci Stanley leading the project.

The collaborative began when five social service agencies came together with the idea of pooling all the data they were tracking individually about impact and outcomes as a means of benchmarking against each other.

"Prior to the Collaborative, each participating agency was limited to benchmarking its programmatic impact against itself only," Traci said. "Throughout the human services sector, external outcome statistics are difficult to find, measurements of success vary dramatically, and processes and practices are not standardized. This is a group that voluntarily said, 'Let's create our own.' We benchmark data in the areas of afterschool, early childhood, workforce development, and adult education."

Today, the collaborative is made up of seven agencies (two more joined later): Albany Park Community Center, Chicago Commons, Children's Home + Aid, Chinese American Service League, Erie Neighborhood House, Gads Hill Center, and Christopher House. They aren't just tracking outcomes, Traci said, but using exactly the same assessment tools and measures and software. "The whole purpose is that we compare data we get in collaboration meetings and compare results, so if one organization is getting better results, we want to learn why. What strategies are they using? What can we do to improve our programs?"

At Christopher House, Traci monitors the data in a shared database. As a group, they also compare reports at collaborative meetings.

"One of the main drivers is that each of these social service agencies is offering a range of activities," she said. "That meant that, because each of us was using multiple databases or Excel spreadsheets or whatever it was, a CEO couldn't go into one database and pull something sophisticated because that information lived in three or four different systems. The first goal was to centralize our participant information."

The agencies recognized that they might find cost efficiencies by trying to identify software

they could share—they ended up choosing Social Solutions ETO. "The reasons were twofold," Traci said. "It was really customizable, which was really great for a specific service area like counseling or social work, but they needed software that was flexible, too. With ETO, you own the license and make changes within the software, and everyone liked that idea."

The participating organizations signed a Memorandum of Agreement that outlined the overall purpose and vision for the collaboration and how they would share data, as well as expectations for the process. "There's an appendix that lists the data elements that roll up to our outcomes and expectations about frequency for staff getting info into it, things like that," she said. "It says we make decisions together—there's no agency that is empowered to make changes alone—and there's a section identifying Christopher House as project manager."

The MOA also covers high-value outcomes, and what needs to be entered into the system to report on them. "When we signed agreements, part of it was going through a discovery process together," she said. "We worked with Social Solutions and brought in an outcomes management expert from DBN & Associates, and through that discovery process we wrote blueprints and tackled each program area one at a time in a phased approach. The blueprints were just putting in writing what the outcomes, measures, and research and assessment tools we would use were, and how we wanted the software configured."

They laid out the outcomes and demo fields the agencies all wanted to track together—outcomes, how long participants were in each program, how long they spend doing particular activities in that program, for example—as well as identifying target populations and who they were trying to serve. For the most part, the agencies were on the same page about what they wanted to track, though some had additional needs that were added to subsections. In all, the blueprints ran to more than 70 pages, she said.

Social Solutions took that information and used it to configure the database in a way that all the participating agencies wanted to use it. Each agency bought its own ETO license, and can enter and see its own data. Christopher House purchased a community license, which acts as a shared warehouse for the database. Participant information entered into each agency's database refreshes to the ETO Community daily.

"So, I enter in assessment scores for children in the Christopher House, for example, and at midnight tonight it will get synced to the ETO community site," she said. She can see the data as she entered it, but users viewing it through the community site will only see the shared data report without identifying information about clients such as names or social security numbers.

Not all agencies participating in the collaborative came up to speed at the same time, for a number of reasons. All the agencies took part in an "Outcomes 101" training, she said, which got them all speaking the same language. "Some people thought of outcomes as 'output,'" she said—in the nonprofit world, outputs are programs, training, and workshops while outcomes are knowledge transferred and behaviors changed—"so that helped."

The collaborative also had conversations about how to establish data tracking systems on the front end, but applying those plans revealed some challenges. "In the planning stages, staff established well-thought-out plans for how to implement a collaborative evaluation system," Traci said. "However, when the CBC went live with the software, it was necessary to make tweaks and

rework the plan. Each agency faced challenges that required capacity and resource enhancements so they could effectively measure impact on children and families."

In reality, she said, it took two years to get to the point where the collaborative was running data reports it had confidence in.

"We heard that the No. 1 reason people failed at this kind of thing was trying to do too much at first, and that definitely seemed to be true for us," Traci said. "As we discussed what was important to measure across our seven agencies, we found that it was a long list of items. So when it came to implementation, we agreed to phase in the data entry expectations over several months, because agencies needed time to consider how they would allocate resources and structure staff to ensure all data was entered on time and accurately."

So, how did the collaboration work? Traci illustrates with an example.

The seven agencies in the Collaborative adopted the best practice of defining a standard attendance rate for all Adult Literacy students, and then implemented policies to encourage regular attendance. "These changes drove increased attendance rates across the board," she said, "furthering the CBC's overall goal of making sure adult students get the level of instruction they need to build the English language and literacy skills that will help them maintain higher-paying jobs. To help them attain these jobs, Collaborative agencies worked together to develop action plans to target higher wage employers for job placements."

As a result, she said, the agencies' average hourly wage increased from $10.41 in Fiscal Year 2012 to $11.42 in Fiscal Year 2014.

City Of New Orleans

- *New Orleans, Louisiana*

A mayoral administration launches a data initiative to measure its progress toward stated goals of eliminating blighted and abandoned properties in the city.

Shortly after Mitch Landrieu was elected mayor of the city of New Orleans, Louisiana, in 2010, he set a number of goals for his administration—among them was a desire for the mayor's office to be more accountable, transparent, and rigorous in how it ran City Hall, and a plan to professionalize operations. He also had a mandate to get serious about the city's blighted and abandoned housing program, which had been around for years but which faced much bigger challenges from the damage Hurricane Katrina left in its wake.

A number of neighborhood groups had self-organized to do counts of abandoned and blighted properties, he said, and there was interest from a coalition of civic organizations led by the business council and urban league. To address the issue, the mayor created a transition task force that recommended a strategy for dealing with blight, including adopting new tools to deal with the problem on both the carrot end and the stick end, according to Oliver Wise, who at the time was Landrieu's Policy Director. Wise drafted a plan that the office started to roll out that fall 2010.

Underlying the plan was the idea that the core city service to deal with blight was the code enforcement process—before the city could act on a property by razing it, redeveloping it, or auctioning it off to a new owner, the courts needed to pass a judgment on the property. "That process is linear," Wise said. "Inspection, title research to notify all stakeholders, public notice, and then administrative hearing. Then can get a judgment and go down the abatement path."

Wise built the blight strategy on that foundation. The administration dedicated its efforts to managing the operational steps in that process, and then added more measures about redevelopment as the program matured, including a substantial gap financing program for new owners to take possession of an abandoned house, fix it up, and live in it. It set a goal of reducing blight by 10,000 units—a unit is a single address, so a duplex would be two units, for example—by the end of the mayor's first term in 2014.

To do that, the city needed some way of measuring its progress.

"We struggled with that," Wise said. "We can count up interventions, but that's a crummy way to go about measuring outcomes—just because you close on a judgment doesn't mean it's not going to be blighted forever. Blight is a symptom of failure in a real estate market, and in order to have a scalable effect, the market has to work. Once it becomes too expensive to fix up a property, why would an owner put too much money into it if they can't get that money back? The market has to change so the equation makes sense to the property owner."

Wise came up with BlightSTAT, which tracks all data related to permitting, code enforcement, and land and property regulation in a central database—the program began with an existing database that the administration has since replaced with one custom tailored to meet its workflow. Field workers—property inspectors, title researchers, case workers, and others—enter their data into the system remotely.

That made it easy to measure judgments, but not necessarily progress. For that it needed an independent assessment, Wise said. It began with a quarterly U.S. Postal Service dataset about properties that were receiving mail and those not receiving mail that could be, and had it analyzed by a local nonprofit that determined it to be a "fairly decent proxy measure," he said.

But that dataset became unavailable for almost two years, and when it reappeared it had deteriorated substantially. "We were left in a bind about how to measure," he said. "There was a professor at the University of New Orleans that had been doing a longitudinal property survey. His sample sizes weren't large enough to compare directly, but we used ratio estimation with old USPS data and applied the change."

The other goals—of increasing transparency and rigor—it met by holding monthly public BlightSTAT meetings during which city leaders and managers review performance results related to the program.

The city met its goal by April 2013, ahead of schedule, and was able to demonstrate that it had done so.

"Politically, it can be a tough thing to do—all these meeting and all this data—as it's not always the best story to tell," Wise said. "The way you get reelected is by people perceiving you're doing a good job. The people on (the mayor's) political staff had some anxiety because the program is creating opportunities for bad press, but the mayor himself has been a stalwart supporter of the program, and while everyone was on board and supportive, they weren't Pollyanna-ish about the potential political risk that type of transparency can bring."

Moving forward, the program is looking for new ways to measure progress. "We're investing in a new tool to do property assessments in New Orleans," he said, including Google Street Cam-type technology with a camera mounted on a car that will drive every city street—which takes five days or so—to film properties at every address. Working with Intel, the White House, and GIS mapping company ESRI, the city is developing an application to crowdsource the "rating" of those photos to help identify blighted properties to act upon.

There's no question the program has been successful, but Wise said it wasn't without growing pains.

"We had a massive learning curve to get people to enter the data and learn how to do it," he said. "We're still ironing out lots of kinks. User adoption is a major challenge in any project like this, and we hired someone outside our IT department who is on the ground doing a lot of adjustments and configurations and workflow mapping to make it easier. He was really instrumental in understanding the users' needs and adapting to them."

Since beginning BlightSTAT in late 2010, the city procured resources to build a full-time professional performance management department. As Director of the New Orleans Office of Performance and Accountability, Wise heads the team of five full-time analysts that run programs similar to BlightSTAT tracking other cross-department issues, including revenue and cost containment, permitting and land-use regulation, procurement contracting and payables, police recruitment, and data about the city's 311 customer service telephone line.

Wise recommends that other organizations looking to get started on a similar path of tracking data to measure progress should jump right in.

"Get started and start counting stuff and don't get too worried about getting it absolutely perfectly right," he said. "It's about getting a viable product out the door and giving yourself the room to improve on that. For us, this is a regular means to check in on whether we're doing what we said we would do—that's helpful to any organization. Then you can start to ask more and more sophisticated questions."

Consumers Union

- *New York/Washington D.C./Austin, Texas/San Francisco, California*

An organization undertakes a two-year strategy review to better understand who it represents, what they want it to do, and how their actions affect one another.

Consumers Union is the policy and action division of Consumer Reports, and works with more than a million activists to pass consumer protection laws in states and in Congress and influence pro-consumer reforms by corporations. As an advocacy organization, Consumers Union has made it a priority that actions and decisions be informed by data. Almost two years ago, the organization initiated a lengthy strategy review that included evaluating its issue mix using a data-driven approach to better understand the impact on consumers and how issues affect strategic opportunities.

The first stage of trying to implement an engagement-first policy is to find out what's going on directly from consumers, said a Consumers Union staffer—in other words, the organization wanted to better understand the issues of interest to consumers. The organization collected thousands of consumer stories by email, and then reviewed every topic its advocates were working on and created a tool to guide them in the measurement of impact.

"While we get good interest from our supporters across the board on our issues, we found they had a lot of interest in issues like cable rates, those annoying robo-calls, credit card charges, and privacy," she said.

Consumer Reports was created in 1936, and is best known for its publication of the same name. Many of the advocacy efforts the organization did in the 1930s are still relevant today.

"Articles in our first issue included ones on high-cost loans, milk quality and safety, and toy safety," she said. "I always laugh about that because many of those articles could have been written yesterday."

The mission of helping consumers is a broad goal, and Consumers Union wanted to try to "better define approaches to identify the issues it would tackle" by looking at the harm faced by consumers, how advocacy work on the issues supports its mission, and how that work presents strategic opportunities to engage with and build consumer support.

"We work on issues as diverse as labeling genetically modified foods, and also health care-acquired infections, for different reasons," she said. "We developed a number of ...data-

driven tools that we're deploying internally to help us to decide how to allocate our limited resources. Obviously, where issues have a significant health, safety, and financial impact, that will feed into our decision-making process."

But it isn't just the choice of priority issues that demands a data-driven approach. Success depends on the organization's ability to implement a range of strategies and tactics. It needed to measure the real impact of the email list, social networking activities, and volunteers. The million-strong mailing list is "very strong on the coasts," she said, but light in the middle of the country. "Advocacy is, at its heart, politics," she said—"it matters if you have a base in the middle of the country, we need to grow and measure that growth in states where we're underrepresented." The two-year reexamination led to new goals for volunteer development targeted in those underrepresented areas.

To target those geographic areas, Consumers Union wanted to make sure it addressed issues of interest to people who live there. One way to identify those issues is through focus groups.

"We conduct a lot of focus groups," she said, "and I learn something almost every time. We're also looking for ways to speak to people and drive list-growth by doing independent research starting from the state, and looking at what's being discussed there. It may affect how we prioritize topics or it may require us to talk about a topic that's already a priority in a new way."

As part of its two-year review, the organization looked at its social networking strategies and determined they were still limited, and that comments, likes, and shares at the scale currently being supported did not necessarily translate well into activities known to have direct influence on lawmakers or corporations.

"We have to be in these channels, because people are talking about the issues there, and we need to step up our work and find the right measures to understand our impact there," she said. In order to improve its social strategy overall, the organization plans to prioritize several projects directed at social channels, provide better resources for them, and implement the kinds of analytics tools for social media that better measure impact.

"I expect our social strategies to become a lot more effective the more they can be based on better metrics," she said.

The organization puts a lot of weight on its email campaigns, trying different approaches and measuring results. It tests different subject lines and different body text to see which get the best results, and that drives the next round of email. "It gives us a pretty good feel for the best-performing message," she said. "It would be nice to do more content testing. We're a persnickety, fact-checking kind of organization, and it's hard to get content up. We'll be streamlining processes so we can react faster."

Staff also repurposes microsites—small, focused websites—for each issue campaign it undertakes, but is shifting that strategy. "Our microsite-based approach worked for us for a while, but we believe integrating them into one engagement-oriented site promotes a more consistent brand," she said.

In addition, automated systems keep track of nearly every kind of action its audience might take. Of the million people on its list, Consumers Union has been able to identify about 15,000 core supporters who actively volunteer for the organization in a meaningful way—people who attend events, hold house parties, lobby in their state capitol and much more—in the past 18 months.

"There are certain things that are true volunteer stuff, like signing up to have a conversation with the meat guy at Trader Joe's, or talking to a store manager," she said. That person is doing a way different and more influential thing than signing a petition."

That lets the organization target and mobilize volunteers when there is a local angle to an issue, such as getting people to attend a Comcast shareholder meeting in Philadelphia.

Essentially, she said, the organization has created a process for trying to measure all stages of an issues campaign, from deciding which issues to act on to tracking the mobilization efforts of the people who respond. "This coming year we will implement changes to how we do all our work based on this lengthy period of analysis, but also based on new processes for getting the right data and acting on it faster."

METHODOLOGY: HOW WAS THIS REPORT WRITTEN?

Idealware mined its network of technology experts and consultants to help identify potential organizations for case studies relevant to the topic of performance management, and then narrowed the list internally to 10 nonprofits that met a list of the following criteria:

- Several small organizations, and several large ones
- Several doing approachable things with data that most nonprofits can collect
- At least one using "Big Data" to improve programs
- At least one using data to triage or calculate who should receive what services
- At least one using passive data collection to evaluate programs
- At least one using communications metrics to improve advocacy programs
- At least one using external data to supplement its own program data

The authors conducted roughly hour-long telephone conversations with staff members involved with data at the 10 organizations and chose seven based on relevance and how well they met the criteria. Based on those conversations, Idealware wrote the case studies and analyzed the information to look for patterns or conclusions that could be drawn.

The report's lead sponsor, Exponent Partners, provided the names of two organizations for the original list of 10. We chose one of them for a case study. The sponsor had no input into the editorial content or research of this report.

OTHER RESOURCES

All of these articles, reports, and workbooks are absolutely free to download.

A Few Good Constituent Relationship Management Tools, Idealware

Your organization maintains relationships with a number of people in a number of different groups, some discrete, some overlapping, and being able to track and manage information about those relationships is critical to your success. While some databases are designed to provide a detailed look into only one constituent group, like your donors or your volunteers, a CRM is meant to provide a high-level look at all of your different constituents. They're often marketed as "all-in-one" database solutions. Is a CRM a good fit for your organization? Let's take a closer look at some of the determining factors before diving into recommendations about specific tools available to you.

The Landscape of Salesforce for Nonprofits: A Report on the Current Marketplace for Apps, Idealware

Do you use Salesforce as a CRM database at your organization, or are you considering it? Since it launched in 1999, more than 20,000 nonprofits have employed the cloud-based system, which is made available to them for free through the philanthropic Salesforce Foundation. What's the catch? Making such a powerful system work for the particular needs of a nonprofit isn't always straightforward. This report breaks down misconceptions about the tool and collects disparate information in one place to help you make informed decisions. Whether you're already using Salesforce, are thinking about adopting it, or have yet to even consider it, there's information here for you. What's more, we included a directory of consultants or firms with experience working with nonprofits to implement Salesforce and the additional App Exchange modules that we cover in this report to make it easier for you to find the help you'll need.

Understanding Software for Program Evaluation, Idealware

In our increasingly data-driven world, nonprofits need more than ever to be able to measure and monitor the effectiveness of their programs. It's difficult to improve program services or reach without first measuring current effectiveness. How many meals served at a soup kitchen, the number of students in a mentoring program who graduate high school, the percent of the target population without access to affordable housing—such numbers help organizations identify the areas where they can improve their programs. Like many big-data issues, the sector looks to technology to help with program evaluation. To help nonprofits in this area of technology, we researched and wrote this reference guide that provides overviews of the types of software that, when brought together, can enable your organization to accurately and confidently collect, measure, and monitor the outcomes and effectiveness of its programs.

Getting Started With Data-Driven Decision Making, an NTEN workbook prepared by Idealware

This NTEN resource, researched and written by Idealware, report showed that, although some organizations are relying heavily on data, a number were doing very little to actually measure their work or use that data to inform other decisions. Could your organization use more help thinking through how to use data to help your organization make decisions? What do you want to measure? Why do you want to measure it? What are your metrics? How do you communicate the results throughout your organization? How do you use data to plan? This workbook will help you answer those questions and make your data work for you.

The GuideStar Exchange:

Giving nonprofits the tools to empower data driven decision making.

WWW.GUIDESTAR.ORG/EXCHANGE