NPS 201 – The Strategic Management of Non Profits Organizations

Benchmarking Project

Performance Measurement to Drive Growth

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Girls Action Network

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1. INTRODUCTION

Nonprofit organizations increasingly understand the importance of performance measurement: they have to report tangible results to their founders and boards; they use it as a tool to fundraise, track results and improve their services.

Our client, *Girls Action Network (GAN)*, a non profit organization in its initial phase, is faced with the same challenge. GAN wants to understand how to implement performance measurement in the organization in order to drive growth in an orderly manner.

The process of benchmarking allows identifying best and most used practices on a topic. Our benchmarking project will concentrate in identifying how non profits are dealing with performance measurement in their day to day operations and will provide some theoretical frameworks that will help GAN to think about the topic and launch its own measurement tools.

2. CLIENT ORGANIZATION

Our client is *Girls Action Network (GAN). GAN's* programs support women from underserved communities to develop the skills they need to be part of the workforce of the 21st century.

They do it through promoting the development of girls ages 13 and up from underserved communities with educational and mentoring activities. GAN was created in 2002 in New Jersey and started its services in 2003.

Their main programs are: vocational identification training; skills and abilities development, mentoring programs; and cultural and educational awareness. Through workshops, seminars, lectures and brown bag lunches with professional women, GAN provides role models to the young women, to enhance their horizons and build their skills to enter the workforce.

These services are provided either in seminar and activities that they organized or through the ones done by schools and other social organizations in the community. To participate in a GAN program, girls have two alternatives:

(i) Be directly sponsored by GAN or

(ii) Be a student in a host organization that contracts with GAN.

The range of programs GAN offers are the following:

1. Career Exploration & Planning
2. Self-Assessment
3. Labor Market Information (LMI) and Career Information
4. Essential Skills for Success
5. Education & Training
6. Preparing for the Workplace
7. Community Leadership
8. Health & Fitness

3. METHODOLOGY

We approach this benchmarking project by starting with an in-depth interview of the client, to understand the needs of the organization. This allowed us to define the main dimensions of performance measurement that should be included in our project.

We then identified other non profits who were either excelling in performance measurement or doing just average. The key factor was to have both a real understanding of where the sector is in terms of performance measurement and what are the best practices.

The literature review showed that the Balance Scorecard is the ultimate tool to implement performance measurement. So we ensured to have at least one non profit using the tool to be able to compare how organizations using and not using it perform.

With this in mind, we have interviewed 6 organizations that provide services in the areas of human, youth and health services. They represent a variety of non profits. They are a mix of large and small; international and national in scope; recently formed or well established and working on gender issues or on other development topics.

The questionnaire was designed to cover the range of performance measurement activities including: measurement process, data collection, challenges in implementation and staff dynamics.

We conducted phone and one on one interviews with them, with a structured interview during the month of April 2007.

What follows is the analysis section are the main conclusions are lessons we derive from them.

4. LITERATURE REVIEW

"*How well are we helping our clients?"* is a challenging question that nonprofit organizations like *Girls Action Network (GAN)* need to answer. For years, nonprofits tried to answer this question by simply gathering information on their outputs. The number of clients they serve, the type of services, programs and activities they provide, the number of volunteers or volunteer hours contributed and the amount of donations received, were all part of alternatives to measure their success in helping clients. This literature review will provide some alternative visions on how to implement performance measurement.

Outputs identification is the first thing a non profit should do to start engaging in the process of performance measurement. This includes identifying ways to measure the delivery of concrete services, for which they need to develop outcome indicators and data collection procedures.

We found that most nonprofit organizations did not use sophisticated data collection techniques[1] and probably stay in this initial level of performance measurement to report their impact and results.

But this puts them in great disadvantage with those who have more sophisticated tools to measure their performance. In order to face the increase competition for scarce

[1] Elaine Morley, Elisa Vinson and Harry P. Hatry, "Outcome measurement in nonprofit organizations: current practices and recommendations", 2001,Available at http://www.urban.org

resources, non profits need to enhance their performance measurement and become more skilled on how to measure outcomes.

On the Symposium on "Outcome Management for Nonprofit organizations" which was held in 2001, at the Urban Institute in Washington, D.C the discussion evolved around the idea of non profit organization focusing their management practices and decisions on the results they intend to achieve for their beneficiaries. The need to go beyond measuring results to using the results to increase the effectiveness of services and its outcomes was one of the topics discussed the most. The agenda encouraged not just outcome measurement, but outcome management as well.

Moving from outcome measurement to performance measurement means entering the world of Kaplan and Norton[2]. They have created an innovative integrated measurement system called the Balance Scorecard. The Balanced Scorecard is an organized framework for lining up the activities with organization goals. It is a useful tool for grasping what the organization is doing and deciding how it could be develop in future.

The Balance Scorecard helps managers to evaluate their organization's performance from four different perspectives: how customer views the organization; how the organization works internally; how the organization improves its performance and how the organization relates with donors. By reducing the number of measures used, balance scorecard limits information overload.

[2] Kaplan, Robert. Strategic Performance Measurement and Management in Nonprofit Organizations. Nonprofit Management & Leadership, 11(3), Spring 2001

In the private sector, the introduction of the balanced scorecard, has allowed companies to achieve dramatic performance improvements. Kaplan and Norton consider the role of the balanced scorecard in nonprofit and government organizations as key since the approach includes setting objectives for both donors and recipients, since both are customers of the organization[3].

For GAN to consider the idea of the scorecard, could be highly beneficial since "The scorecard's customer perspective measures the entity's performance with targeted customer and market segments by using such outcome measures as market share, customer retention, new customer acquisition, and customer profitability[4]". This perspective also allows to measure the "*value proposition*—how the organization creates value for its targeted customers", which is at the core of what GAN is looking for.

As Kaplan says, "Strategy and performance measurement should focus on what output and outcomes the organization intends to achieve, not what programs and initiatives are being implemented". This means that GAN would like to view its programs and projects as ways to achieve its strategic objectives, not as ends but as means to realize their mission.

Finally, there are voices of concern about how the use of performance measurement systems tend to suffer from problems that can undermine an organization's ability to use its measurement system to improve processes and make better decisions. One of these flaws

[3] Kaplan, Robert and Norton, David. The Strategy Focused Organization: How balanced Scorecard Companies Thrive in the New Business Environment. Boston: Harvard Business School Press, 2001.

[4] Kaplan, Robert, Ibid.

highlighted by Castellano, Young, and Roehm[5] is **"**misunderstanding the real role of measurements"

For them non profits don't always understand the real role of performance measurements and they support the vision to differentiate between measuring outcomes and performance. A proper role for measurements they said is to provide management with input and feedback in order for them to be able to manage and monitor the processes the organization implements. "Good results can only come from good processes[6]".

5. PROSPECT IDENTIFICATION

Using Guidestar and other search tools, we have identified a list of some 15 organizations as the most interesting and helpful ones working on either women or youth issues. We also looked for organizations with expertise in labor related trainings and for those that were result oriented in their presentation to Guidestar. We identified within the Kennedy School student body those students running or working with NGOs and talked to them about their experiences with applying performance measurement in their organizations. The client suggested the incorporation of *GEMS* to the list of NGOs to benchmark since it is one of the non profits from whom GAN founder got inspiration when creating GAN.

We were trying to obtain a mix of national and international, large and small organizations to provide a better representation of what non profits are doing in terms of performance measurement. As a young and small organization, we assume that it is helpful for GAN to know how other small but well established organizations have encountered with

[5] *Joseph F. Castellano, Saul Young, and Harper A. Roehm.* The Seven Fatal Flaws of Performance Measurement. The CPA Journal Online. Available at http://www.nysscpa.org/cpajournal/2004/60
[6] Ibid

their challenges. At the same time, the way the large organizations are functioning provides a broader perspective for our client. Finally we ensured to have at least one institution using the Balance Scorecard approach, in order to see how the ideal theoretical model is being applied in reality.

6. PARTNER ORGANIZATIONS

We interviewed the following six organizations as part of our benchmarking project:

6.1 Citizen Schools

A growing national network of after-school education programs for students in the middle grades (6th, 7th and 8th), *Citizen Schools* is helping students develop the motivation, skills and relationships necessary for success in high school and college and eventually to become good workers and citizens. *Citizen Schools* operates apprenticeship programs, connecting adult volunteers to young people in hands-on learning projects.

Citizens School currently serve 3,000 middle-school students and engage 2,400 volunteers at 30 sites nationwide.

6.2 Girl Scouts of the United States of America

Girl Scouts of the USA is the world's largest organization dedicated to helping all girls everywhere build character and gain skills for success in the real world. In an accepting and nurturing environment, and in partnership with committed adult volunteers, girls develop strong values, leadership skills, social conscience, and conviction about their own potential and self-worth that will serve them all their lives.

6.3 Africare

A leader in aid to Africa, *Africare* assists families and communities in Africa with in food, health, water, the environment, education, emergency humanitarian aid, private-sector development, and governance. *Africare*'s programs address needs in the principal areas of food security and agriculture as well as health and HIV/AIDS. *Africare* also supports water resource development, environmental management, basic education, micro enterprise development, governance initiatives, and emergency humanitarian aid.

6.4 Women's Bean Project

Women's Bean Project is a Denver-based program that assists underprivileged women in gaining job skills, and personal & economic self-sufficiency. The Women's Bean Project is a stepping-stone to employment and personal and economic self-sufficiency for women from backgrounds of chronic unemployment, poverty or displacement. Within the context of a viable business, these women earn a steady paycheck, develop solid transferable work skills, and strengthen their sense of self-confidence and personal responsibility.

6.5 The Way of the Heart: The Promotora Institute (WHPI)

The Way of the Heart: The Promotora Institute is an non-profit organization in Arizona, established in June 1999. *WHPI* provides free services to a largely rural community on the Arizona/Mexico border. Using community health worker (promotora) model, *WHPI* offers outreach, education, training, referral and advocacy to low-income women and their families on such diverse topics as prenatal and postpartum care, environmental health, cardiovascular health, substance abuse prevention, youth leadership.

6.6 GEMS

GEMS provides preventive and transitional services to young women, ages 12-21 years, who are at risk for or involved in sexual exploitation and violence. Founded in 1999, *GEMS* works to meet the needs of at-risk young women by providing them with support and opportunities for positive change.

7. ANALYSIS

This analysis is based on 6 interviews with non profit organizations based on the same questionnaire. All of them measure performance either qualitative or quantitatively yet most rely mainly on quantitative data with a few of them being able to measure qualitative impact. We present the analysis section by comparing answers in four main areas: measurement process, data collecting, use of the data, challenges, staff and recommendations.

7.1 How are non profits measuring their outcomes?

Different tools are being used to implement performance measurement in the non profits that we benchmark. As an initial tool most organizations use are base line surveys. *Africare* updates these baseline surveys with evaluation exercises on a quarterly basis, and with monthly reports that are mainly used for internal consumption. *The Way of the Heart: The Promotora Institute* (WHPI) uses a wider range of tools including: prenatal test, a knowledge attitude practices survey, evaluation form, mood scales, and clinical measurements. In a similar situation is *Women's Bean Project*, who measures initially demographic data such as job history, education, public assistance, criminal history, substance abuse and housing. *Girl Scouts* collects demographic data online from the girls before they join the program.

Citizens Schools also uses pre and post tests, student surveys and anecdotal success stories. But they have a more integral approach and they are the only organization, among the six, that uses the balanced Scorecard. They have found this method very helpful because it allies the whole organization. “We always assimilate our organization with a plane” says Anuradha Desai from Citizens Schools “For a plane to flight it is not enough to put all the mechanical part of the engine together, and the pilot seats in the cabin. All parts of the plane should work in alliance with each other.”

7.2 Do they differentiate between quantitative and qualitative data?

The differentiation between qualitative and quantitative outcomes is done in all of the organizations. For quantitative outcomes they generally measure basic statistical data such as age, gender, level of literacy, socioeconomic level, etc.

Regarding qualitative measures, the definition of how to measure them depends on the type of program they are implementing but in general they tend to measure attitudes and practices changes as a way to identify behavioral change.

Africare, mentioned doing a KABP analysis (which measures level of **k**nowledge, **a**bility, **b**ehavior and **p**ractices) before they start their programs. *Girls Scouts*, in turn, uses the theory of change by which they ask themselves what has to happen?and how this will lead to something else?. For Harriet, from Girl Scouts “Sometimes changes are more qualitative than quantitative". In order to be able to capture these changes they use observational analysis in their sessions to measure behavioral change.

In the case of *Gems*, they measure qualitative impact in a more subtle way. They track if there are changes in the language being used by the community when talking about the women they support, or the issues they are working on, etc, as a way to identify attitude change.

Overall, the effort to measure qualitative outcomes implies being able grasp the impact in term of promoting social capital or of having a substantial impact in the beneficiaries. The challenge for them when measuring qualitative impact is how to assign causality.

Nevertheless, both donors and organizations work with the assumption that the value provided by most programs goes further than what the non profits are being able to prove in terms of quantitative outcomes. The quantitative indicators provide the minimum proof of success but the qualitative ones allow to show long term impact. Yet in this area non profits are having a harder time in developing their indicators to prove their impact.

7.3 How do they collect the data?

The initial collection of data depends on the type of program the organizations are implementing. All of them use questionnaire and pre and post tests to gather the initial information.

In the case of *Citizens Schools*, they use an integrative approach by doing anecdotal success stories with the students, which are then back up by interviewing the parents and teachers. What is innovative about them is that by using anecdotal success stories they are able to register the changes that would occur in the day to day life of those who are participating in the programs. For example, a student who had been aggressive before starting the program reports that she hasn't had fights in class after attending the program. This is confirmed by her parents, peers and teachers. So they are able to create an integrative approach to measure their impact.

In the case of *Girl Scouts*, using online tools has proved a very successful policy since youth are very much used to using computers and are more willing to provide information about them through a digital platform.

The use of technology is widespread among the organizations. They all highlight the importance of having good software programs for data collecting. Some of them had a bilingual program be specially designed for them. Others rely on market available products. But they all agree that the process of monitoring progress has greatly benefited from the introduction of good software.

The introduction of technology was not done easily. Most organizations expressed having experienced strong resistance from their staff in the process of incorporating these new technologies. Also, at times, they felt that they had too much data, which force them to decide if the data collected was useful or not. "The data that you collect should be useful for your organization and for the movement. It is important that you take just what you need to take" says Gomez-Murphy from WHPI.

Africare uses a software known as SPSS to measure its outcomes. "It makes a lot of difference, because it is faster and more accurate to use this system, rather than doing it manually" says Mufute. *GEMS* uses ETO, Social Solution Software. *Women's Bean Project* uses file-maker system to process data and WHPI has specially design an in house bilingual program for their particular needs.

7.4 How to use the collected data?

Having data allows the organizations to prove their work both internally to motivate their staff and externally to motivate donors. Being able to show tangible results for their work constitute a major support for fundraising activities as well as to adjust the programs that are being implemented.

"Once we have the data, then we know where we are going, so we can get more funding and prove to donors that this works. And also, some of this is training for them" says Ruth Mufute. For Rachel of GEMS "Having tangible results have helped with donors and fund raising. In most cases, having these indicators in place is a key requirement of them".

In the case of *Citizen's School*, the data is presented twice a year to the senior management so that the programs can be readjusted and their impact maximized.

Having data to prove that there is a social need in the area in which the non profit is working is also key to support advocacy activities. Maria Gomez believes that the "data can be used as a baseline for advocacy to democratize health in the US." This organization also uses the data to engage its staff by discussing the implications of the findings. They use the data as a teaching tool for them and their staff.

7. 5 What are the challenges non profits face when implementing performance measurement?

As the main challenges in terms of a successful implementation of performance measurement, almost all of the organizations mentioned that it is a time consuming process and that staff resists it, as the key factors limiting a successful implementation.

In the case of *Africare*, the biggest challenge is having reliable people to collect the correct data “because people can make up figures” says Ruth from *Africare*. The reliance on volunteers to collect data can also be problematic, since they may not see the importance of it, as Harriet from *Girl Scouts* says. *Women’s Bean Project* also finds data collecting as time consuming activity and this aspect of it, can limit staff engagement in supporting the successful implementation of performance measurement.

Another important challenge is to be able to long-term follow clients, in order to shows that their help is enduring. Again the challenge to provide qualitative impact is a major one.

Some organization mentioned the lack of financial resources as a key barrier to implement performance measurement in all their programs, although most of them did not have an issue with this topic.

7.6 What is the role of the staff in measuring performance?

Staff involvement and support is key to have a successful system of performance measurement in place. For this to happen, staff should be trained in data collecting techniques and should be fully aware of the fundraising impact that having sound data has in the institution.

In some cases, we found that the entire organization is committed to performance measurement. Staff and volunteers collect raw data, then in the phase of analyzing data more experienced staff is needed. In the case of *Citizen Schools*, everybody who works in the program gathers data. For *Africare*, the same situation applies, in the sense that field staff collects data, but they also have one person in the country and two in their central office to guide the measurement process for the institution.

Some non profits choose to have their evaluation staff as consultants and others have senior staff within the organization. *Africare* and *Citizen Schools* use consultants. Relying on consultants provides an external authoritative source that increase the confidence of donors in the results provided by the non profit.

Girl Scouts, has a small research department that guides the process of data analysis. Gems also relies internally on performance measurement, with a Director of Operations and Strategic Management hired to implement it. Women's Bean Project has three staff assigned to the function as Service Director, Production Manager and Case Manager.

Overall, all of the partner organizations rely on some mix of full staff involvement for data collection with technical people specially assigned to analyze the data and implement corrective actions where needed.

7.7 Recommendations

When asked what would they recommend to a non profit that is initiating the design of its performance measurement tools, the partner organizations highlighted the following as the key issues to considered:

1. The use of professional expertise (especially in the initial phase) to develop performance measurement systems is highly recommended by all.
2. Keep it simple, make it user friendly. This allows the staff to be more proactive in the process as well as the client to comply better with the information requested, and for those processing the results to know the information they have.
3. If using the balance score card, ensure full commitment in the organization since the tool is demanding.
4. Reward good performance within your staff.
5. Ensure that you use the information that you gather to improve your programs.
6. Ensure to use the results of performance measurement in your discussion you're your staff as a way to motivate and train them
7. Use targets that are SMART – Simple, Measurable, Achievable, Time And Result Oriented

8. CONCLUSIONS

Measurement matters! Organizations that don't ensure proper measurement systems end up "running like a head less chicken!" says Ruth Mufute. Being able to measure results provides a sense of guidance to the work, motivates employees, proves success to donors and align the organization to achieve its mission and vision.

The Balance Scorecard is the ultimate tool in designing performance measurement systems. Now, few organizations, and mainly the large ones are using it. The rest rely on a mix of in house design tools, baseline surveys and qualitative interviews or "anecdotal success stories" to show their results.

Donors seem to be the initial leading force pushing for successful implementation of performance measurement, but once a non profits develops the habit, it finds that performance measurement is a need not an imposition and they recognize the value it provides.

Staff engagement in the process is key to ensure success, since they are many times the ones who collect the data. For them not to feel the whole process as a burden or as a control mechanism, creative ways to share the results have to be implemented. Staff needs to feel they are a key part of the process in order to transform their resistance into cooperation.

In the process of implementing successful performance management systems, non profits are able to incorporate tools used in the for profit world. In doing so, they gain because they can show the impact of their work and they can raise resources to keep doing it.

For a new organization like GAN, the challenge is to implement, early on strong performance measurement, in order to drive growth in a proactive way

7. ANNEX

a. QUESTIONNAIRE

Questions for Benchmarking Partners Interviews

Measurement Process:
- How do you measure outcomes in your organization?
- Do you use balance scorecard? If yes or no, please explain why?
- Do you differentiate between quantitative and qualitative outcomes?
- How do you measure qualitative outcomes? (please give an example)
- How do you measure quantitative outcomes? (please give an example)
- Do you include impact measurement in all your projects?

Data Collecting:
- What kind of data do you specifically collect from your clients before they start your program?
- What kind of data do you collect from them after they have done your program?
- How do you collect these data? (By interviewing them, by make them fill out a questionnaire, …)
- How do you follow up on your client?
- Do you use technology to collect, store, analyze, and track the data? If yes, what programs do you use?

Challenges:
- What were the main challenges you faced when implementing performance measurement? (Staff resistance, tension between management and staff, lack of data, financing…)
- What have been some of the strengths and pitfalls of your measurement system?
- What do organizations going to this process need to watch out for?
- How do you evaluate the accuracy and efficiency of your measuring system?
- What have been the most important lessons you have learned from this process?

Staff:
- How many staffs are involved in this specific function?
- What are their Job descriptions?
- What make them especially qualified?
- What makes them high-performing?

Extra questions:
- What did you not anticipate in this process?
- What would you like to measure that currently you are unable to do?
- Do donors care about impact evaluation?
- Did your efforts diverge from your plans? If yes, why?
- What is important for you to know about the project that you do?

- To what extend was the board involved in the introduction of impact measurement to your project?
- Do you know of other organizations that are good at collecting this type of information?

b. MAIN HIGHLIGHTS BY INSTITUTION

1) Citizens Schools (1995)

A growing national network of after-school education programs for students in the middle grades (6th, 7th and 8th), Citizen Schools is helping students develop the motivation, skills and relationships necessary for success in high school and college and eventually to become good workers and citizens. Citizen Schools operates apprenticeship programs, connecting adult volunteers to young people in hands-on learning projects.

School Citizens currently serve 3,000 middle-school students and engage 2,400 volunteers at 30 sites nationwide.

INTERVIEW

- ***How to Measure Outcome:***

Our first priority is to collect and use data to help students succeed. We assess students' oral presentation and leadership skills before and after they participated in to the program. We collect and analyze grades, attendance and retention patterns. We solicit feedback from students, volunteers, parents, teachers, and staff, then we assess the quality of each apprenticeship. In the next step, our research and evaluation team crunch the numbers within days of obtaining them and feed them back to Campus Directors and their staffs, so that they can use the information to guide their choices of activities and their works with individual students. *Citizen Schools* staff use the data collected through the Quality Rubric to evaluate individual campus performance and to illuminate patterns, trends and connections across the *Citizen Schools* network. This data is, then, presented back to our Campus Directors twice a year in January and July, so they can develop specific strategies and initiatives to maximize the impact of their campus the following semester.

- ***Measurement System:***

Citizen Schools use “Balanced Scorecard System”. We develop goals for the organization, for each program and within each program. The team leader records all the information. Then, every two months, we check if we meet the targets. We measure outcomes in 4 key areas: “Programs” (how kids are doing in terms of learning?); “Volunteers” (how we recruit our volunteers?); “Fundraising” (could we raise enough fund?); “Marketing” (how we are doing as an organization?). Then, each department also uses Balanced Scorecard to create its own plan based on the goal of the organization. We decide to raise, for example, $ 5 million for next year. Then, the funding department should decide what to do to raise this money and evaluates if the goals has been met.

- ***Qualitative and Quantitative Outcomes:***

We differentiate between quantitative and qualitative outcomes but we use the same method to measure them. Some times the goals are quantitative; for example, we want to have 1000 kids a year and 100 students in each campus. Some times we measure quality of our goals; for example, how the kids improve their leadership skills. We have tried to create more qualitative indicators to measure the outcomes because quantity itself is just a dry number. Our goal, for example, is that the kids become successful in their life. We have recruited 10 thousands kids, and we raise 10 million (qualitative indicator), once they go through our programs, we measure what percentage of our kids go to the high school (quantitative evidence). It shows us that our programs have been successful in giving these kids the tools so that they can apply for high school.

- ***Staff***

Entire organization is committed to data collecting. We have also an operating team of 8 heads of departments, who are responsible for making sure that data get collected in their departments. When all the data in departments get elected, it is reported to the director of evaluation and research department to get the data analyzed. In measuring the performance, top level commitment is very critical. The president of the organization should be committed to performance measurement.

Staff qualification:

The staff should learn how to collect data and what kind of data should be collected. Analyzing the collected data is done by an experienced person or team.

- ***Data tools:***

We try to get the information from all the people who participate in the program. To make sure that we reach out a multicultural population, we use questionnaire to identify who is the client in terms of gender, age group, profession, race, etc. The other tools we use are pre and post test; students' survey; anecdotal success story; evaluation forms.

- ***Following up with the clients:***

We follow up with the kids in 3 ways: alumni program, alumni gathering and email. The alumni program keeps the data about how many kids came in, how was their experience, how many went to which high school, how many applied for which college, how many got in, And Four times a year, we have also alumni reunion.

- **Challenges:**

The most important challenge we are facing with is staff resistance because data collecting is very time consuming.

- **Strengths**

Balanced Scorecard System allies the whole organization. We always assimilate our organization with a plane. We want to fly. For a plane to fly, it is not enough to put all the mechanical parts of the engine together, and the pilot sit in the cabin. All parts of the plane should work in alliance with each other.

- **Pitfalls**

Balanced Scorecard System, sometimes, is very process oriented. You want to get things done but you get stuck in collecting data and evaluating the process. It took us 6 to 9 months to take the system in but real refinement happened over a year. Now our system is much more sophisticated than 4 years ago.

Accuracy and efficiency

We have internal and external evaluation of the accuracy and efficiency of our measuring system. In Internal evaluation, the data gathered by staff is presented back to our Campus Directors twice a year in January and July, so that they can develop specific strategies and initiatives. In this way, we can maximize the impact of the campus in the following semester. In external evaluation, *Citizen Schools* has engaged *Policy Studies Associates*, a national leader in non-profit evaluation, to conduct a longitudinal study of *Citizen Schools*' program and its impacts. The study compares cohorts of students enrolled in *Citizen Schools* to cohorts of their academic and demographic peers in Boston.

- ***Recommendation***

- It is useful for any organization to consult with experts in measuring performance before they start any measurement system. Once a measurement approach is applied in an organization, it becomes part of the culture of the organization and it is hard to change it.

- Don’t create a complicated measurement method. Your staff and clients don’t like to feel overwhelmed.

- Balanced Scorecard System needs a real commitment. You have to really do your part. If I am an executive director of the funding department, I have to make sure that I am able to meet whatever goal we set for fundraising.

- To encourage everybody to get committed in the process, we create bonus reward. If the departments meet 85% of their goals, everybody in the department would get a bonus.

- Everybody in the organization should be informed about the results of performance measurement.

- ***Lessons:***

- Data driven organization helps to improve the performance

2) <u>Girl Scouts of the United States of America</u>

Girl Scouts of the USA is the world's largest organization dedicated to helping all girls everywhere build character and gain skills for success in the real world. In an accepting and nurturing environment, and in partnership with committed adult volunteers, girls develop strong values, leadership skills, social conscience, and conviction about their own potential and self-worth that will serve them all their lives.

The purpose of the organization is to promote the qualities of truth, loyalty, courtesy, purity, kindness, obedience, cheerfulness, thriftiness, and kindred virtues among girls as a preparation for their responsibilities in the home and for service to the community, and to direct and coordinate the Girl Scout movement in the United States, its territories, and possessions, and to fix and maintain standards for the movement that will inspire the rising generation with the highest ideals of character, conduct, patriotism and service that they may become happy resourceful citizens.

<u>INTERVIEW</u>

- ***How to Measure Outcome***

When we start a program, right from the beginning, we figure out what we want to accomplish. When we develop the outcomes, we always ask this question: "are these outcomes age appropriate?" because we are working with girls from the age of 5 to the end of the high school. The way we measure the outcomes depends up on the programs. But, generally, we collect some data, including demographic data before the girls join the program. We do not measure outcomes in all the programs. Formal evaluation is done only If the program has some funding particularly for the evaluation. For example, we have 3 projects funded by department of justice. They have asked us to specify some portion of the funding for evaluation.

- ***Measurement System:***

We use specific techniques for different programs. First, we first evaluate what is needed to be measured. We use the theory of change: What has happened and how it leads to something else. Some times changes are more qualitative than quantitative such as when we address personal behaviors or attitudes in the observation sessions in a program. In the programs like anti-violence, we, for example, ask how they would act if the were in a particular situation. The instructor may not notice her change, but she, herself, feels it and reports it. We also examine the adult observation; for example, we ask the parents if their girl has fewer fights since she has participating in the program. The quantitative data is collected mostly on line.

- ***Qualitative and Quantitative Outcomes:***

We differentiate between qualitative and quantitative outcomes and we get them in different ways. We try to measure the behaviors which are the symptomatic and in order to do that we need to use very subjective indicators.

- ***Staff***

We have about 25 staff who is working on different kinds of work for projects. They are not fully involved in this process. We have one staff that is doing all the outcome works. We are trying to get everybody involved by organizing an outcome measurement workshop for everybody in membership, global girl scouting, programs, and in research department.

Data tools:

We collect data in many different ways: on line research, individual interviews, girls' observations survey, adult observation survey, pre and post test, and scaling. We have a research department that is responsible for outcome evaluation. We also work with some outside research organizations to find out what are the best tools and indicators to collect the data for each program.

- ***Following up with the clients:***

We haven't done a really good job in this matter yet because of funding, and staff. But we are going to do that. The only thing that has been done in terms of following up is that there is a study called "who's who of American women". We looked at what percentages of those women were girl scouting. There have been some research study like that have been done.

- ***Accuracy and efficiency***

When we develop something new, we always make sure that its income is reviewed by outside research firm. We do it because sometimes our founders require that we have independent evaluators and sometimes we assume that it is better to do that. And we also try to do more than one kind of measure.

- ***Barriers:***

First, If you don't prove enough incentive for people to respond, getting data is very difficult. We haven't got high response as we would like. Second problem that we are facing with is most of our colleagues are volunteers; they are not paid for their time, and you are asking them to do something that they do not know the importance of it. It is easier when you have staff to say that his is part of your job. We want to develop the tool that would be easy to use and girls can use alone. Perhaps we find some way to collect our data on line. We give great response when we do things on line.

Recommendation

- Develop the most user friendly tools as you can.

- You can not measure everything; therefore, decide on what is the most important outcomes for the program. People tend to ask loads and loads of questions but they can never analyze all them.

- ***Lessons***

We have learnt many lessons such as: how difficult to collect the data; how important to make the process simple for people to use; and if people do not understand why these data is important, they are not going to do it; Sometimes the girls also thinks that you are evaluating them, therefore, It is important to make them understand that you are looking for general outcomes.

3) Africare (1970)

A leader in aid to Africa, Africare assists families and communities Africa wide in food, health, water, the environment, education, emergency humanitarian aid, private-sector development, and governance. Africare's programs address needs in the principal areas of food security and agriculture as well as health and HIV/AIDS. Africare also supports water resource development, environmental management, basic education, micro enterprise development, governance initiatives, and emergency humanitarian aid.

INTERVIEW

- ***How to Measure Outcome:***

We set our objective then come up with some benchmarks periodically. We check to see where we are in terms of achieving those objectives that we have set. After implementing our project, we talk to the young girls or their parents to track the changes in their life because of the messages that we deliver. We include outcome measurement in all of our projects. If you do not do it, you will be running like a headless chicken! Our aim, our mission is to improve the life of people in Africa, we have to see and to show that we actually do so. We measure Level of literacy, level of knowledge, we call it our KABP, before we start the program. And after implementing, we measure the same indicators again to see the differences.

- ***Measurement System:***

We use Baseline Survey to measure the outcome. When we start by establishing a baseline survey, on a monthly basis we have to review reports that are monitoring tools that we use. Then, on a quarterly basis, we review to see the level of achievement, and how far we are from achieving our goal completely. Mid way we review to see if we can achieve our goal because the situation can change. It is a helpful method specially when you are in a place where other interventions are taking place and you have to take that into consideration when you do your evaluation.

- ***Qualitative and Quantitative Outcomes:***

We look at the impact of program in both ways. When we are sending out HIV messages, we have to measure if it causes the behavioral changes. Measuring behavior change, if it is about HIV, is difficult. But you can measure it if in a school where pregnancy rate for young girls had been high and then it decreased after you implemented the program. It shows a behavior change and it is qualitative. Normally for behavioral change you have to wait for 2 years or even in a year, depending on the program.

- ***Staff***

Everybody is trained on how to measure performance. We have specifically 1 per local office and 2 in headquarters in the monitoring and evaluation office. But many people have the responsibility to measure impact. One person out of 20 in headquarters and each field office have 50 people.

- ***Staff qualification:***

They have lots of experience in analyzing data.

Data tools:

The type of data is quantitative and qualitative. For example, the number of people that have been trained, the data of the training itself, how many time they have been trained are quanitative data that we collect. Some times we give them a test, what was the scoring like. This is the type of qualitative results that we look for. Qualitative is measuring the level of knowledge that they now have. If they know what HIV is. We collect the data in SPSS software, that it is used in analyzing data. The data is collected on the ground and then punch in the computer.

- ***Barriers:***

The biggest challenge is having reliable people to collect the correct data, because people can make up figures. You have to also have simple tools that are user friendly that they can use to collect the data. The biggest challenge is when you use the TOT (community leaders) to collect data on your behalf and then your staff go and collect that. Timing is also an issue. You have to check and verify the data. If you need to do it timely, then you have problem because people have different paces. Also, when we are working with young people it is very difficult to collect the data because young people are very mobile. They move a lot. The infrastructure is also bad in some communities so even reaching them is an issue. We have also problem with the staff. They feel we are monitoring them, and they don't like to collect data. So we have to push hard into them the importance of gathering data.

- ***Strengths***

Measuring outcomes gives pride to the organization. The results give me pride. Even for programs without donors, we use measurement because we want to be result oriented, that is what we want to be. You need to have direction. Outcome measurement is also good for monitoring. Internally we use them to see if we are making progress or not, performing or not. It is also used to prove to our donors that we have made an impact or we are meeting our targets. We use them also for sharing with the communities themselves, and with other partners and the government.

- ***Pitfalls***

Sexual behavior, HIV AIDS is our biggest challenge and it is very difficult to measure. Yes, we can say the number of people that were reached, which is quantitative. But to measure whether people have changed their behavior, for example, if partners are sticking to one partner or if men are using condoms, it is difficult to measure because this is something that it is done at night, at dark. Donor are pressing, they say, “Tell us if behavior is changing”, specially if you are passing out condoms, you can say how many you have distributed, but can you say if they are using the condoms? We don’t know.

- ***Accuracy and efficiency***

We normally hire outside people. We usually do our own evaluation but if you really want to measure behavioral changes you have to do it from outside the organization.

- ***Recommendation***

- I would say that you should look into doing it. First you have to have a mission that it is bought by everybody in the organization.

- Look at where the organization is at the different levels, in performance where is it, where do they want to go, and why there is a difference.

- Once you have done that you set a target. You need to agree with achievable targets. At the beginning don’t come up with targets that are too ambitious because you want to see whether it works or not. And then improve later on. Targets should be SMART, means: simple, measurable, achievable, time and result oriented.

- As you implement, you check to see whether there are any distortions or other things, and keep re doing them until they are realistic.

- You need also to monitor to the progresses.

- Let’s say that there are teams in place, you have to reward them, whoever performs well should be rewarded, recognized. It creates a good atmosphere.

4) Women's Bean Project (1989)

The Women's Bean Project is a Denver-based program that assists underprivileged women in gaining job skills, and personal & economic self-sufficiency. The Women's Bean Project is a stepping-stone to employment and personal and economic self-sufficiency for women from backgrounds of chronic unemployment, poverty or displacement. Within the context of a viable business, these women earn a steady paycheck, develop solid transferable work skills, and strengthen their sense of self-confidence and personal responsibility.

INTERVIEW

- ***How to Measure Outcome:***

Define success; Develop Logic Model that shows flow of services tied to our 3 program goals, and to objectives & outcomes.

- ***Measurement System:***

We measure our outcome by collecting data before the start: such as demographic data like Job history, education, criminal history, substance abuse, etc.; basic needs such as housing, child care, etc. After our client has done our program, we measure the outcome by collecting data such as improvement in elimination of barriers to employment (housing, etc.), life skills (budget management, computers, self-confidence, etc), goal achievement, employment. We collect these data by interviews, questionnaires, satisfaction surveys. We don't use any particular system. It depends up on our projects. People who have used balanced score card feel that it is a very complex tool to use in developing indicators linked to outcomes. We use outcome measurement in all of our project.

- ***Qualitative and Quantitative Outcomes:***

We measure qualitative outcomes by asking women to shares their experiences at a fundraising luncheon, and by anecdotal success stories. For quantitative outcomes we count the number of women who met benchmarks for basic workplace competencies or the number of women who secured subsidized employment

- ***Staff***

3 staff is working on outcome measurement. Their job description are Services Director, Production Manager, Case Manager.

- ***Staff qualification:***

To be qualified, they should have strong experience with target population, and to be high performed they should be dedicated to the mission.

- ***Data tools:***

Pre and Post Test, Employee Evaluation Form, Training Track Evaluations, Job Placement & Retention Forms, as our ability to offer effective programming depends in large part on our ability to drive sales, we measure business growth & productivity (COGS, etc)

- ***Following up with the clients:***

After 6 & 12 month, we call to the client, $50 check for follow-up cooperation, employer contact. We use file- maker system to put the data together.

- **Barriers:**

Change culture, financing, lack of data, staff time are some of our challenges.

- **Strengths**

Participatory w/ staff & clients

- **Pitfalls**

Finding time; transient target population

- ***Accuracy and efficiency***

A PhD's on program committee will evaluate our system.

- ***Recommendation***

These are some of the things any organization should be cautious about: outcome measurement becoming overly analytical, not to developing too many forms that will be ignored, not using measurement information effectively

- ***Lessons:***

Outcome measurement is very time-consuming, pain in the butt; it is critical for stakeholder satisfaction

5) <u>THE WAY OF THE HEART</u> (1999)

The Way of the Heart: The Promotora Institute (WHPI) is an non-profit organization in Arizona, established in June 1999. WHPI provides free services to a largely rural community on the Arizona/Mexico border. using community health worker (promotora) model, WHPI offers outreach, education, training, referral and advocacy to low-income

women and their families on such diverse topics as prenatal and postpartum care, environmental health, cardiovascular health, substance abuse prevention, youth leadership.

INTERVIEW

- ***How to Measure Outcome:***

We always start with demographic information. In order to analyze the data we have to be able to compare gender, socio-economic status, their family status, are they on well fare or working parents, do they have support system, do they have some kind of religious life. And sometimes the data like weight and their health status. We also ask questions like do you have fire arms in your house, what is the relationship of your family with the alcoholic beverages, are they available to any one. We try to assess whether they have a safe environment or not. We use outcome measurement in all of our projects. For example, in case of education we use pre-test and we also evaluate how the client is going o change his or her behavior based on the intervention. For violence, we use mood scale. The promoters are trained to make sure that the clients write things. They are trained to be specific and get to the point.

- ***Measurement System:***

We use baseline measurement in order to compare over time. We give people the evaluation tool, prior to their intervention when they come in to us. Then we give them the same document immediately after the intervention and then usually over a period of time, for example one month, every 3 months or 6 months. The longer we can measure change, the more we can know whether we have been affective or not. In some cases it might be several years.

- ***Qualitative and Quantitative Outcomes:***

Quantitative outcomes are easier to capture, like clinical measurement. Qualitative outcomes are much more difficult to capture. You have to ask questions in a lot of different ways. For example we capture the data based on attitudes and practices. Knowledge is quantitative issue but attitude and practices are qualitative. We also include the action plan at the end of the evaluation of the each module. At the bottom we ask the questions like “has your life changed in any way based on the intervention you had today?”

- ***Staff***

We have 21 staff. All of them would give me the raw data and then I would pull these mountains of data and categorize it and then analyze it. I use it as the teaching tool too. That was another level of evaluation for us, we sit down and discuss what the findings were. What the implications were. Their job description is very long and detailed but all of them were responsible to collect the raw data from the clients.

- ***Staff qualification:***

Promotores movement is about peer education. They have to come from the same cultural, social-economic, linguistic and educational back ground as the client they served. They get interviewed. And they fill the tests. They should have the sense of leadership and they should be good at problem solving, other wise they have the same problem that their client has. Their own sense of excellence is the key of their high performance. You can not make a camel go to water if it doesn't want. They have to have a basic drive. And you can pick that up during the interview but I understand that I am asking them to spend lots energy for social change. I know that I had to feed them. The way that I feed them is by constant training. And spend time with them, talk, debriefing and sharing.

- ***Data tools:***

We measure the outcome with the variety of tools, depends on the kind of project such as pre- test, knowledge attitude practices survey, evaluation form, mood scale, and clinical measurement, interview. We have also been very lucky to have a very specific program. This program was developed by engineering department of a university special for the things that we do in 2 language, English and Spanish. We enter the electronic data for each client. And you can follow all information on it when you have an appointment with them it shows up in your computer.

- ***Following up with the clients:***

We do the follow up after the intervention. It is very costly to collect data over the long period of the time. And you are not got paid to do this kind of stuff. Very rarely the state or federal government gives you money to do the evaluation or follow up. Follow up is really tailored to the need of client. A girl who has been raped, for instance, we prefer to see her every two weeks or may be in a week. You might want to give this person more time. You might choose to go out side your study protocol and send a social worker to see if that person is ok.

- **Barriers:**

My staff didn't like to fill out the data in the computer. They might write it down but they did mind to put it in the computer, they thought that it dehumanizing clients.

- **Pitfalls**

The pitfall was to constantly be after them, make sure that they wrote down the information immediately after the intervention, they capture what they need to capture. We always have clients in waiting list, or lined up in the office. It is very difficult to make staff to be disciplined. We had cases like a woman that got kicked in her stomach for being pregnant and needed to be rush in to emergency.

- ***Accuracy and efficiency***

We had a national, regional, state and local advisory council. When I am developing those kinds of tools I will send it to everybody in my network. They will give me their feedback. The other thing is before we start to use it, we will test it with a focus group. Often it is about cultural competency and whether people understand, not only language, but also the concept based on the class and access to the opportunities. You go through the whole process of development before you actually going to the field and start.

- ***Recommendation***

- I really recommend that the one who wants to start an organization spend the time to interview somebody who is already in the field for a long period of time and ask the question because when you are asking the question you also understand what you are looking for.

- I also recommend that you develop a relationship with that person. If you just walk away then you are loosing the ability to develop a network, and some body that you can pick up the phone when you need. You can take them out to dinner or give them some thing in return, to add value to the person who helping you out or you give them a modest stipend just to tell them you value their time.

- Use evaluation tools in every opportunity and that's why we deliberately make it as short as possible.

- Data that you collect should be useful for your organization and for the movement, for example useful for democratization of health. It is important that you take just what you need to take. You don't want to over whelmed the client. They don't like to be treated like a research subject.

- ***Lessons:***

Evaluating gives you the truth you have to constantly challenge yourself. When you have design a program you have to design an evaluation component at the same time. If you don't, you will be trying to fix mistakes that had never occurred to you. If you ask this question of my staff, they would answer that it made them to understand the importance of their work, how effective they were, it made them make mid-term corrections, it make them better at what they were doing. But the most important is that it shows the significance of the work. That it was not just individuals, that we share lots of attribute as a human beings, that is an Ahaa moments for them.

6) GEMS (1999)

GEMS provides preventive and transitional services to young women, ages 12-21 years, who are at risk for or involved in sexual exploitation and violence. Founded in 1999, GEMS works to meet the needs of at-risk young women by providing them with support and opportunities for positive change.

INTERVIEW

- ***How to Measure Outcome:***

Gems does initial intake of information and then follows up with independent evaluators. They do a follow up 3, 9 and 16 months after the intervention took place. To measure outcome we use education, employment, health and mental health indicators.

- ***Measurement System:***

We used it in the past balanced score card in the past, we don't do it anymore. It is very challenging to use it successfully and you might get caught in the day to day of implementing it.

- ***Data tools:***

We do an initial intake and then a follow up with. Yes they use ETO – Social Solution Software, which is a very useful tool for them. When did you decided to start measuring results?

- ***Following up with the clients:***

They do a follow up 3, 9 and 16 months after the intervention took place.

- ***Qualitative and Quantitative Outcomes:***

It is key for us to differentiate them. Quantitative are the education level, the number of people that participate in the trainings, etc. In qualitative terms, they measure the effect they are having in term of advocacy, with media coverage (tracking both mentions and message quality) and if they are raising people's awareness. Also they track the changes in the language being used by the community when talking about the women they support, or the issues they are working on, etc.

- **Challenges:**

At the beginning it took some time until they could adjust to work with the software. They find it hard to identify which were the categories and indicators that were most useful to them.

Having tangible results have helped with donors and fund raising. In most cases, having these indicators in place is a key requirement of them. The challenge is to find a delicate equilibrium with them and also to be able to push back on them a little and to gain space for the organization, since not everything can be measured. For example, in GEMs vision, the initial engagement of the girls is a key dimension even when they don't go ahead and do a program or an activity with them. Donors need to be told that it is not always about Numbers, Numbers, Numbers!, that there is a value in promoting human dignity that cannot me measure so easily. How do you capture in a report your impact on human dignity?!