

# Aligning Tools and Talent to Measure Outcomes

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# Introductions

- New Sector Alliance
  - Fellowships to train emerging leaders in the social sector
  - Three sites, connected by cloud-based systems
  - Stakeholder-intensive programs; lean staffing
  - Federal support from CNCS/AmeriCorps
- 501Partners
  - Salesforce solutions for non-profits
  - Consulting
  - Salesforce Bootcamp
  - Conversions to Salesforce
  - 501 Launchpad for data management in Salesforce

“I need some software to help us track our program outcomes. It must produce reports about our cohorts by age/gender/ethnicity, track success of host site placements, and it needs to keep evaluations and documents all in one place while meeting AmeriCorps privacy guidelines. We’re already doing a lot of this, but in spreadsheets.”

## Getting Started: Defining our Problem

Easy!

# Finding a Solution: Let's buy some software!

**Think again. It's not that simple.**

- There are too many potential solutions and none actually gets at the *real* problem.
  - Too expensive
  - Too complex or time consuming
  - Too hard to train or monitor use
  - Add-on or afterthought to what we were already doing



# OK, Not Software. Let's add this to Salesforce!

**Seems logical – we already used Salesforce.**

- It's a super customizable system, so let's have it collect all the info we need.
- Actually, let's have it collect all we need and then some. After all, Salesforce is really customizable!
- But quantity does not equal quality

Uh oh – not a simple solution.  
Maybe we started with the wrong problem.

# Drucker was Right.

**What you measure is what you manage.**

And also...

- What you measure is what you communicate.
- If you don't manage something, you're not going to keep measuring it.
- You can't manage what you can't see.

**So we should measure what we will manage,  
driving both the 'what' and the 'how' from that perspective.**

# Covey's Habits Provide Reminders.

Be proactive

Begin with the end in mind

Put first things first

Think win-win

Seek first to understand, then to be understood

Synergize

Sharpen the saw

# With the End in Mind: What's the REAL Problem?

- Starts with a goal statement:
  - We need to measure our program impact.
- Framed in our realities:
  - Complex program goals w/ 300+ stakeholders to measure
  - High demand for staff time, low supply of staff
  - Fast-paced culture valuing production
  - Even if had every possible piece of data, we couldn't use it
- Which led us to look for a solution that:
  - Provided measurement of program impact
  - Provided processes and tools for meaning-making
  - Was respectful of staff time and realities



# First Things First: Managing for Program Goals

Stakeholder Providing Assessment (x 140!)	Purpose of Measure	Frequency per Year
Fellows	<ul style="list-style-type: none"><li>• Feedback on trainings</li><li>• Self-evaluation of skills</li><li>• Program evaluation</li><li>• Evaluation of colleagues</li></ul>	<ul style="list-style-type: none"><li>• 45 times</li><li>• 4 times</li><li>• 3 times</li><li>• 2 times</li></ul>
Host Site Supervisors	<ul style="list-style-type: none"><li>• Project assessment</li><li>• Evaluation of Fellow skills</li><li>• Program evaluation</li></ul>	<ul style="list-style-type: none"><li>• 2 times</li><li>• 3 times</li><li>• 1 time</li></ul>
Mentors	<ul style="list-style-type: none"><li>• Program and engagement evaluation</li></ul>	<ul style="list-style-type: none"><li>• 1 time</li></ul>
Staff	<ul style="list-style-type: none"><li>• Evaluation of Fellow skills</li></ul>	<ul style="list-style-type: none"><li>• 3 times</li></ul>

10,080 sets of data!

# We Knew what Not to Do; We Needed to be Proactive.

In the past, we evaluated via anonymous survey. The process was complex.



Over time, we created more standardized tools to simplify the process of data collection. And it didn't help.

We realized the roadblock was data *use*, not collection

# Seek First to Understand...

## What's this really about?

- Why do you want this?
  - External reporting
  - Internal improvements (program, staff)
- When does this info first come into your organization?
- When do you look at it?
- What do you get out of it?
- What's broken?
- What's working?



# Now, with the End in Mind... Synergize.

We focused on the use of data, then worked toward creating tools and processes to support use



Send, Collect, and Store

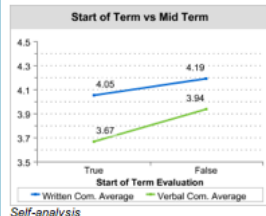
Track and Analyze

# It's Working! We've Learned a Lot Already.

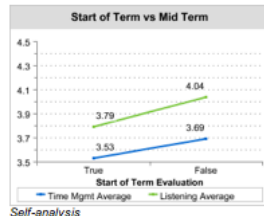
## Smr 13 Skills Analysis Dashboard

Find a dashboard... Edit Clone Refresh As of Yesterday at 10:35 AM

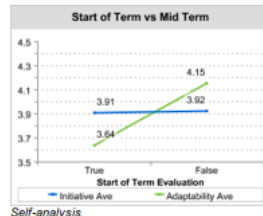
### Written and Verbal Comm. Skills



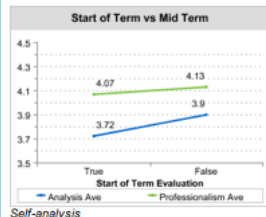
### Time Mgmt and Listening Skills



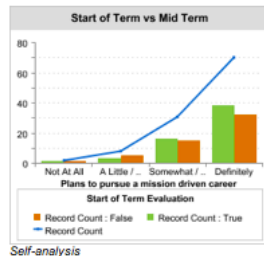
### Initiative and Adaptability



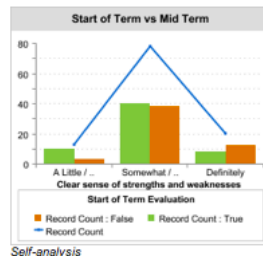
### Analysis and Professionalism



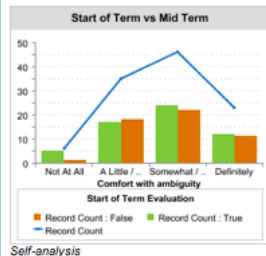
### Pursue Mission Driven Career



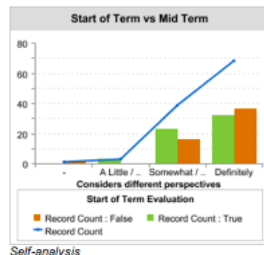
### Clear Sense of Strengths and Weaknesses



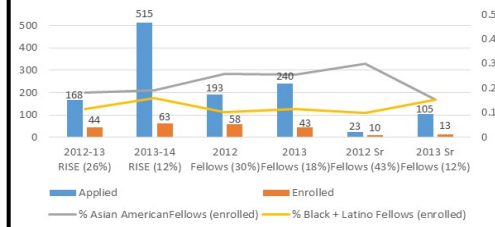
### Comfort with Ambiguity



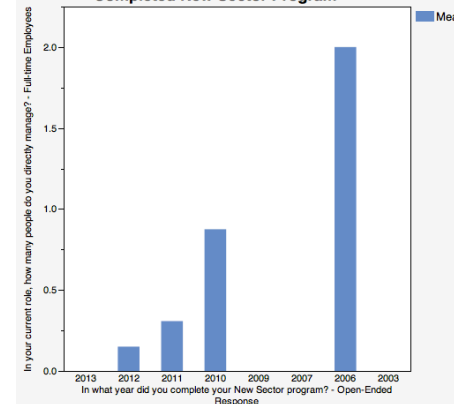
### Consider Different Perspectives



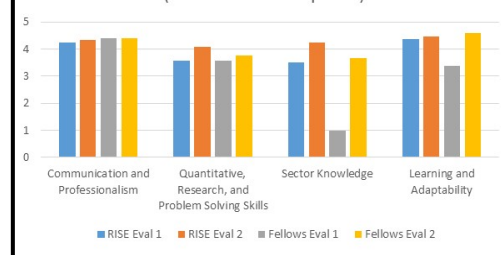
### Fellow Applicants and Enrollment (acceptance rate by cohort)



### Mean Full-time Employees Managed vs. Year Completed New Sector Program



### 2012-13 Fellow Skills by Supervisor Ratings (at two evaluation points)



# Current Status of this Work.

- Refining and reducing evaluation questions
- Monitoring consistency in collection processes
- Increasing visibility of core data real-time
- Using the data to learn and improve
- Learning new/different questions we need to ask

# Our own Habits and Reminders...

- Start with the end in mind.
- Respect (and name) your realities.
- Pay attention to the data lifecycle.
- Focus on data *use*; collection issues can sidetrack management ones.
- Remember:
  - This isn't easy, and isn't the single right way
  - But it is a way to meet goals by making your program-management actions line up with your program-measurement needs.