

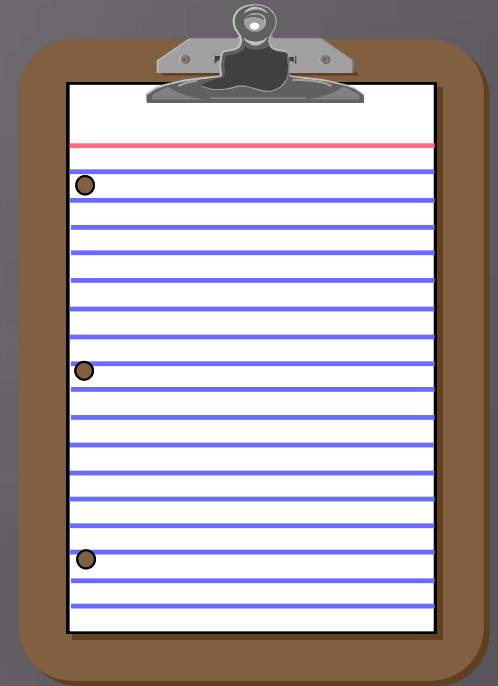
EVALUATION MATTERS!

Leveraging technology to improve client services and “wow” your funders

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Today's outline

- ▣ Introductions
- ▣ A model for evaluation: overview
- ▣ Exploring the model's components:
 - Organizational capacity
 - Data
 - Analytics
- ▣ The power of effective software
- ▣ Pre-requisites for effective software implementations
- ▣ Deriving value from technology
- ▣ Open forum



Who am I?

- ▣ President of MACC CommonWealth, which provides administrative services (primarily finance, human resources, and technology) to local non-profits
- ▣ Long-term technology manager with core competency in data systems and system implementations
- ▣ Someone who cares deeply about the non-profit sector and the communities we serve

Who are you?

- ▣ types of non-profits you represent
- ▣ size of non-profits you represent
- ▣ professional backgrounds / roles

The evaluation dilemma

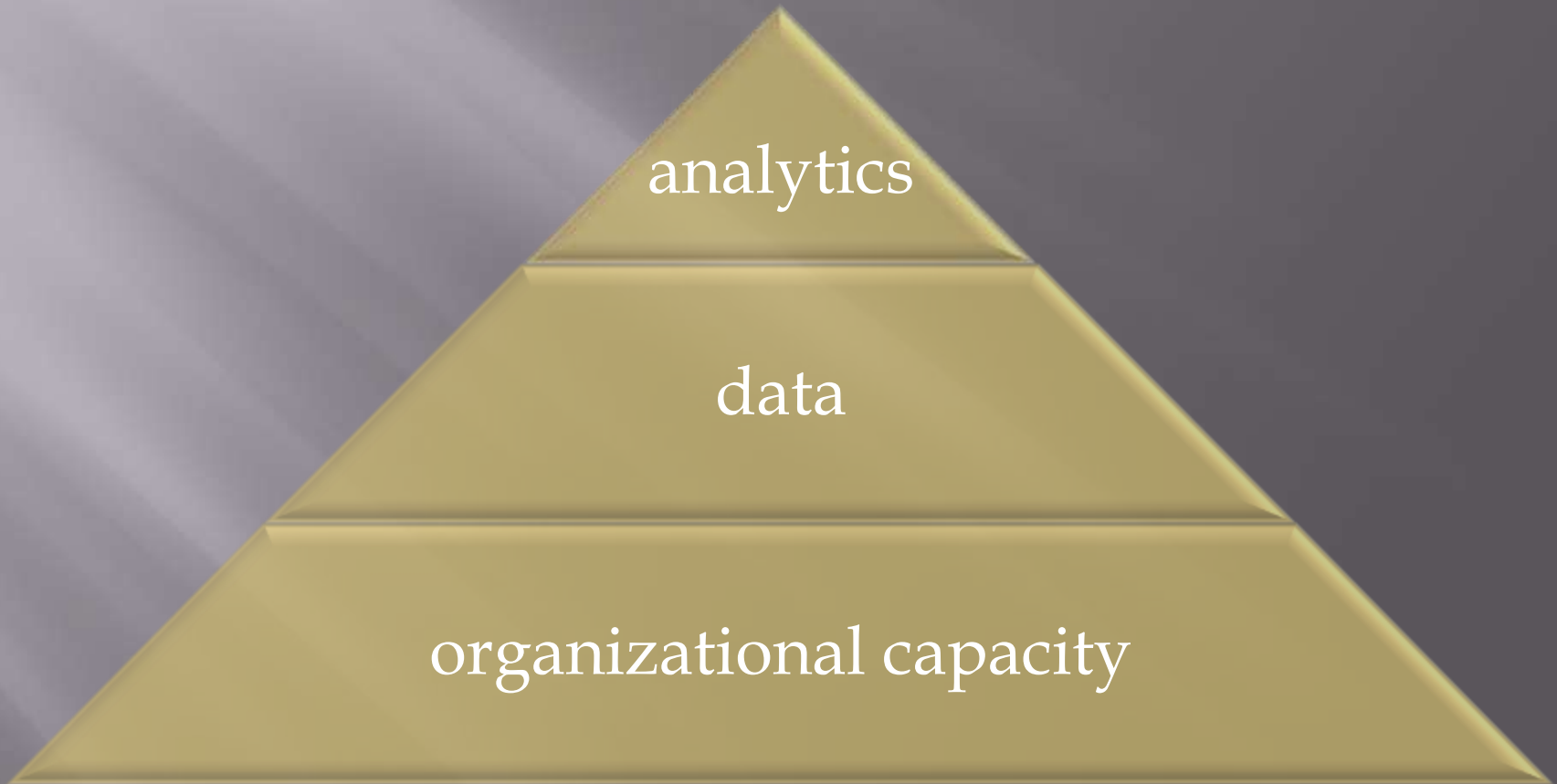


Overall success rates for technology projects calls for caution

- ▣ Multiple surveys during the past decade provide a consistent, discouraging finding: over 50% of technology projects will fall short of success (failure to meet desired outcomes, timetable, and/or budget)
- ▣ The primary causes of failure are generally related to people and organizational factors (not technology)



A sound model for evaluation systems is rooted in “human factors”



Organizational requirements for success



- a commitment to the value of program evaluation
- prior success measuring the effectiveness of the organization's programs and activities
- a proven track record of managing projects successively
- a culture focused on execution

Data considerations



- acquiring meaningful, high quality data only comes with careful design and planning
- data is best acquired as a by-product of natural processes
- focus on data that matters!

Analytics



- the capacity to tabulate and perform statistical analyses has become a commodity
- key challenges:
 - time-bound considerations
 - complex relationships and correlations

The power of effective software



effective software
helps builds capacity
and contributes to
organizational success
at all three levels of
this model

Good software advances organizational capacity by:



- providing a workable conceptual framework for the overall evaluation process
- providing tools that can be used by internal stakeholders

Good software advances data acquisition by:



- building data acquisition into everyday processes
- providing a structure for data that appropriately reflects how that data behaves “in the world”
- using widely-accepted standards for handling of electronic data (e.g., SQL)

Sample data model considerations for a multi-service environment

program/service relationships

- a participant may participate in one or more programs (and enrollments can be simultaneous, consecutive or overlapping)
- a participant may get services from one or more staff in each program (simultaneous, consecutive or overlapping)
- a participant may receive one or more services in each enrolled program
- a participant may have one or more goals or outcomes related to each program in which enrolled (and progress meeting those goals or outcomes is measured independently)

other people relationships

- a family consists of one or more participants (issue: how do you define “family”?)
- a participant may belong to one or more families (simultaneous or consecutive)
- a person has a unique (and potentially changing) relationship with each person in the family
- a participant may have one or more “interested parties” related to participation
- a participant may relate to one or more external service providers (including incoming and outgoing referrals)

Good software advances data analysis by:



- providing flexible, parameter driven standard reports that cover core needs
- providing comprehensive “ad hoc” data reporting, including ability to export data for further uses or analysis

Sample characteristics of well engineered data analysis

standard reports

- address natural reporting categories like “clients” (or “families” or “unduplicated clients”), “services,” “outcomes,” etc.
- report set-up permits selecting data to be reported, such as:
 - select clients based on a range of participation dates
 - report on clients or services for one or more programs
 - report on services provided during a specified range of dates for a specified group of clients (e.g., in selected programs)
 - report on outcomes achieved during a specified range of dates

ad-hoc data query capacity

- provides a visual interface to data
- describes data using natural, intuitive terms
- provides access to most or all data in the system
- permits selecting data based on user-defined criteria
- permits related key types of data (e.g., relate clients to services, staff to clients, etc.)

Pre-requisites for effective software implementations

- ▣ structure the initiative for success
 - who is the project's executive sponsor?
 - who is the project manager?
 - who is on the project team?
 - make sure the human and financial resources can deliver a successful outcome
- ▣ rely on project management “best practices” to achieve on-time, at-cost results
 - plan and manage scope and sequence of activities
 - manage activities across multiple stakeholders or groups of stakeholders
 - use formal project management and reporting tools
 - create and foster a performance-based environment / pay attention to the project team
 - provide persistent feedback and appropriate corrective action as needed

Simple project management tools are likely to work best

- ▣ MS Excel can easily be adapted to manage your project

Sample headings for an Excel spreadsheet used to manage projects

- ▣ Task
 - ▣ Assigned to
 - ▣ Scheduled start date
 - ▣ Actual start date
 - ▣ Schedule completion date
 - ▣ Actual completion date
 - ▣ Percent complete (e.g., 0%, 25%, 50%, 75%, 100%)
 - ▣ Note
-
- ▣ MS Project is highly complex software – be careful!

Reduce risk with creative approaches to managing scope

- ▣ think about a layered approach to the implementation
 - conference room pilot
 - beta group or groups
 - general roll-out

- ▣ think about limited scope to get the project off the ground
 - think small, move fast, iterate!
 - focus on “depth” rather than “breadth”

Manage the implementation against a compelling value proposition

- ▣ Will there be a compelling impact on quality of services?
- ▣ Will the project advance the agency's mission?
- ▣ Will there be a compelling impact on revenue?
- ▣ Will there be a compelling impact on expense (lots of "land mines" here)?
- ▣ Will there be a compelling impact on constrained resources?

Questions and open discussion

