Breakthroughs in Shared Measurement Systems: Systemic Approaches to Evaluation

Presented by:
Mark Kramer, Marcie Parkhurst, Lalitha Vaidyanathan, FSG Social Impact Advisors

with guest panelists:
Marian Godfrey, The Pew Charitable Trusts
Neville Vakharia, Cultural Data Project, The Pew Charitable Trusts
Jennifer Blatz, Strive

March 24th, 2010 1:00-2:00 PM EST

Presented in partnership with Grantmakers for Effective Organizations
Introductions

**Mark Kramer** is the Founder and a Managing Director at FSG, Senior Fellow at Harvard’s Kennedy School of Government and the founder and initial Board Chair (2000-2004) of the Center for Effective Philanthropy.

**Marcie Parkhurst** is a Consultant in FSG’s Boston office. **Lalitha Vaidyanathan** is a Director in FSG’s San Francisco office. Marcie and Lalitha are co-authors of the report, *Breakthroughs in Shared Measurement and Social Impact*.

**Marian Godfrey** is the Senior Director, Culture Initiatives at The Pew Charitable Trusts.

**Neville Vakharia** is the Director, Cultural Data Project at The Pew Charitable Trusts.

**Jennifer Blatz** is the Operations Director at Strive.
Welcome & Introductions
Mark Kramer, FSG

Breakthroughs in Shared Measurement, Research Overview
Mark Kramer

Benefits and Impacts of the Cultural Data Project
Marian Godfrey, The Pew Charitable Trusts

The Strive Collaborative: From Inception to Impact
Jennifer Blatz, Strive

Audience Questions & Answers
Mark Kramer, Marcie Parkhurst, Lalitha Vaidyanathan, and Panelists
Current State of the Field

• Nonprofit performance measurement driven by funders focuses on the impact of individual grants

• Using inconsistent measures, neither funders nor nonprofits can compare the relative effectiveness of different approaches

• Developing separate evaluation processes leads to substantial costs and burdens

• There are limited incentives for collaboration

A fragmented approach undermines the social sector’s ability to solve large, complex problems
Overview of Shared Metrics Systems

1. Shared Measurement Systems
   - A common platform to report different goals and measures

2. Comparative Performance Systems
   - A system that uses identical measures to compare performance

3. Adaptive Learning Systems
   - A system that uses identical measures to align efforts and goals
# Three Types of Shared Measurement Systems - Cumulative Benefits

<table>
<thead>
<tr>
<th>System Type</th>
<th>Shared Measurement</th>
<th>Comparative Performance</th>
<th>Adaptive Learning</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Description</strong></td>
<td>A common online platform for data capture and analysis, including field-specific performance or outcome indicators</td>
<td>A common online platform for data capture and analysis in which all participants within a field use the same measures, uniformly defined and collected</td>
<td>An ongoing participatory process that enables all participants to collectively measure, learn, coordinate and improve performance</td>
</tr>
<tr>
<td><strong>Primary Benefit</strong></td>
<td>Increased efficiency</td>
<td>Increased knowledge</td>
<td>Increased impact</td>
</tr>
<tr>
<td><strong>Additional Benefits</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cost savings</td>
<td>✴</td>
<td>✴</td>
<td>✴</td>
</tr>
<tr>
<td>Improved data quality</td>
<td>✴</td>
<td>✴</td>
<td>✴</td>
</tr>
<tr>
<td>Reduced need for grantee evaluation expertise</td>
<td>✴</td>
<td>✴</td>
<td>✴</td>
</tr>
<tr>
<td>Greater credibility</td>
<td>✴</td>
<td>✴</td>
<td>✴</td>
</tr>
<tr>
<td>More knowledgeable funding decisions</td>
<td>✴</td>
<td></td>
<td>✴</td>
</tr>
<tr>
<td>Ability to benchmark against peers</td>
<td>✴</td>
<td></td>
<td>✴</td>
</tr>
<tr>
<td>Improved funder coordination</td>
<td>✴</td>
<td></td>
<td>✴</td>
</tr>
<tr>
<td>Improved coordination and strategic alignment</td>
<td></td>
<td></td>
<td>✴</td>
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<tr>
<td>Shared learning and continuous improvement</td>
<td></td>
<td></td>
<td>✴</td>
</tr>
</tbody>
</table>
Overview of Success Measures

www.successmeasures.org

- The Success Measures Data System (SMDS) is a comprehensive, web-based evaluation module that includes:
  - a pool of field-specific indicators
  - a set of data collection tools
  - a robust reporting function
  - web-based data storage
  - technical assistance (available for an additional fee)

- More than 200 organizations currently use SMDS, including:
  - NeighborWorks America
  - Wachovia Regional Foundation
  - F.B. Heron Foundation
  - Habitat for Humanity International

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### Data Summary

<table>
<thead>
<tr>
<th>Data Summary</th>
<th>Export Responses by Form</th>
<th>Export Responses by Data Collection Tool</th>
</tr>
</thead>
<tbody>
<tr>
<td>(There are a total of 70 entries for this query.)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Considerations and Acknowledgements.pdf</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Resdient Satisfaction with Neighborhood</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Please identify your neighborhood by name and either define its boundaries or name the street intersection nearest your house or apartment. (0 of 70 entries responded)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>How long have you lived in or near the location noted above? (68 of 70 entries responded)</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than 1 year</td>
<td>1.47% (1/68)</td>
<td></td>
</tr>
<tr>
<td>1 - 5 years</td>
<td>41.10% (20/49)</td>
<td></td>
</tr>
<tr>
<td>6 - 10 years</td>
<td>30.24% (26/86)</td>
<td></td>
</tr>
<tr>
<td>11 - 20 years</td>
<td>16.10% (11/68)</td>
<td></td>
</tr>
<tr>
<td>21 - 30 years</td>
<td>2.94% (2/68)</td>
<td></td>
</tr>
<tr>
<td>More than 30 years</td>
<td>0% (0/68)</td>
<td></td>
</tr>
</tbody>
</table>

Instructions: Using a scale of 1 to 5, where 5 = Strongly agree, 4 = Agree, 3 = Neither agree/disagree, 2 = Disagree and 1 = Strongly disagree, please select the response that best describes your feeling about each of the following statements.

<table>
<thead>
<tr>
<th>The condition of houses and apartments in the area is satisfactory or better. (70 of 70 entries responded)</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>5 (Strongly agree)</td>
<td>22.85% (16/70)</td>
<td></td>
</tr>
<tr>
<td>4 (Agree)</td>
<td>44.29% (31/70)</td>
<td></td>
</tr>
<tr>
<td>3 (Neither agree/disagree)</td>
<td>17.14% (12/70)</td>
<td></td>
</tr>
<tr>
<td>2 (Disagree)</td>
<td>15.71% (11/70)</td>
<td></td>
</tr>
</tbody>
</table>

- Details regarding the development of SMDS:
  - Developed over a five-year period (1999 – 2004)
  - Total development cost of about $1M
  - Basic annual subscription is $2500; one-time coaching and training packages start at $7500
The Cultural Data Project (CDP)’s mission is to strengthen the national nonprofit arts and cultural sector by collecting and disseminating comprehensive, high quality longitudinal data that supports fact-based decision-making in three key ways:

- It helps arts and cultural organizations improve their financial management and services to their communities.
- It enables researchers, advocates and policy makers to better tell the story of the sector’s assets, contributions, and needs.
- It helps funders more effectively plan for and evaluate their individual and collective grantmaking activities.
What is the CDP?

• Powerful, online management tool designed to strengthen arts and cultural organizations;

• Unique system that allows users to track financial and programmatic performance and to benchmark against other organizations;

• Collaborative partnership of public and private funders and advocacy organizations in each participating state;

• Powerful tool for research, advocacy and policy-making
History of the CDP

- 4 Years of planning beginning in 2001
- $2.28 Million investment to launch
- Originally launched in Pennsylvania in Sept 2004
- Expanded to 6 additional states starting in 2007
  - 2007: Maryland
  - 2008: California
  - 2009: Illinois, New York, Massachusetts, Ohio
- 25 full-time staff housed at Pew
An Emerging National Model

- States that have expressed interest
- States actively working to launch CDP
- States in operation

- States in operation:
  - Alaska
  - Texas
  - Utah
  - Montana
  - California
  - Arizona
  - Idaho
  - Nevada
  - Oregon
  - Iowa
  - Colorado
  - Kansas
  - Wyoming
  - New Mexico
  - Missouri
  - Minnesota
  - Nebraska
  - Oklahoma
  - Washington
  - Arkansas
  - North Dakota
  - Louisiana
  - Hawaii
  - Illinois
  - Ohio
  - Florida
  - Georgia
  - Alabama
  - Wisconsin
  - Virginia
  - Indiana
  - Michigan
  - Mississippi
  - Kentucky
  - Tennessee
  - Pennsylvania
  - New York
  - Massachusetts
  - Rhode Island
  - Connecticut
  - New Hampshire
  - Vermont
  - New Jersey
  - Delaware
  - Maryland
  - Delaware
  - Virginia
  - North Carolina
  - South Carolina
  - West Virginia
  - New Jersey
  - Maine
  - New York
  - Vermont
  - New Hampshire
  - Massachusetts
  - Rhode Island
  - Connecticut
  - New Jersey
  - Delaware
  - Maryland

- States actively working to launch CDP:
  - California
  - Arizona
  - Idaho
  - Nevada
  - Oregon
  - Iowa
  - Colorado
  - Kansas
  - Wyoming
  - New Mexico
  - Missouri
  - Minnesota
  - Nebraska
  - Oklahoma
  - South Dakota
  - Washington
  - Arkansas
  - North Dakota
  - Louisiana
  - Hawaii
  - Illinois
  - Ohio
  - Florida
  - Georgia
  - Alabama
  - Wisconsin
  - Virginia
  - Indiana
  - Michigan
  - Mississippi
  - Kentucky
  - Tennessee
  - Pennsylvania
  - New York
  - Massachusetts
  - Rhode Island
  - Connecticut
  - New Hampshire
  - Vermont
  - New Jersey
  - Delaware
  - Maryland

- States in operation:
  - Alaska
  - Texas
  - Utah
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  - Idaho
  - Nevada
  - Oregon
  - Iowa
  - Colorado
  - Kansas
  - Wyoming
  - New Mexico
  - Missouri
  - Minnesota
  - Nebraska
  - Oklahoma
  - South Dakota
  - Washington
  - Arkansas
  - North Dakota
  - Louisiana
  - Hawaii
  - Illinois
  - Ohio
  - Florida
  - Georgia
  - Alabama
  - Wisconsin
  - Virginia
  - Indiana
  - Michigan
  - Mississippi
  - Kentucky
  - Tennessee
  - Pennsylvania
  - New York
  - Massachusetts
  - Rhode Island
  - Connecticut
  - New Hampshire
  - Vermont
  - New Jersey
  - Delaware
  - Maryland

8,000 organizations
150 grants programs
19,000 reports run
Providing Robust Data for Research

Types of Research and Reports possible:
- Broad analysis or overview of the cultural sector
- Economic impact analysis
- Regional cultural planning
- Economic development planning
- Needs assessments (sector and disciplines)
- Organizational health and capacity

(Full reports available at www.culturaldata.org)
Overview of Strive
www.strivetogether.org
<table>
<thead>
<tr>
<th>Goal 1: PREPARED for School</th>
<th>• Percent of children assessed as ready for school</th>
</tr>
</thead>
<tbody>
<tr>
<td>Goal 2: SUPPORTED In and Out of School</td>
<td>• Percent of students with more than 20 developmental assets</td>
</tr>
<tr>
<td>Goal 3: SUCCEEDS Academically</td>
<td>• Percent of students at or above reading/math proficiency</td>
</tr>
<tr>
<td></td>
<td>• Percent of students who graduate from high school</td>
</tr>
<tr>
<td>Goal 4: ENROLLS in College/Career Training</td>
<td>• Average score on the ACT</td>
</tr>
<tr>
<td></td>
<td>• Percent of graduates who enroll in college</td>
</tr>
<tr>
<td>Goal 5: GRADUATES and ENTERS a career</td>
<td>• Percent of students prepared for college level coursework</td>
</tr>
<tr>
<td></td>
<td>• Percent of students who are retained in college</td>
</tr>
<tr>
<td></td>
<td>• Percent of students who graduate from college</td>
</tr>
<tr>
<td></td>
<td>• College Degrees conferred</td>
</tr>
</tbody>
</table>
Strive Student Roadmap to Success: Key Strategies and Outcomes

**Success By 6**
- **Ultimate Outcome:** Readiness for Kindergarten
  - Home Visitation
  - Quality Early Childhood Education

**School District Initiatives**
- **Ultimate Outcome:** 4th and 8th Grade Math and Reading Scores & ACT Scores
  - Portfolio of High Performing Schools
  - Teacher Quality
  - Math & Science and Literacy

**Community Learning Centers**
- Incorporate student services into learning through networks of high quality services providers in the following areas:
  - Mentoring
  - Physical/Mental Health
  - Business P-ships
  - Youth Employment
  - After-School
  - Arts Education
  - Family Engagement

**College Retention**
- **Ultimate Outcome:** College Graduation

**Financial Stability**
- **Ultimate Outcome:** Percent of People in Poverty

**Workforce Network**
- Career Pathways in High Demand Sectors & Hard-2-Hire Network of Employment Support Services to High Need Populations

**College Access**
- **Ultimate Outcome:** College Enrollment

**Dropout Recovery**
- **Community Report Card** to monitor progress toward meeting ultimate outcomes
- **Student Dashboard** with academic and student support data to enable personalized learning for each child

**Key Transition Years**
Strive: Progress Made

- Committed Partnership
- Common Language
- Improvement on the Ground
- Funder Coordination
Strive: Lessons Learned

• Make the Report Card a Priority
• Manageable Scope of Work
• Communications and Community Engagement
• Policymaker Engagement and Advocacy
• Pooled Resources
Critical Factors in the Development of Shared Metrics Systems

- Strong leadership and substantial funding throughout a multi-year development period
- Broad engagement in the design process by many organizations in the field, with clear expectations about confidentiality or transparency
- Voluntary participation open to all relevant organizations
- Effective use of web-based technology
- Independence from funders in devising indicators and managing the system
- Ongoing staffing to provide training, facilitation, and to review the accuracy of all data
- Testing and continually improving the system through user feedback
- In more advanced systems, a facilitated process for participants to gather periodically to share results, learn from each other, and coordinate their efforts
Audience Questions & Answers
Moderated by Mark Kramer, Marcie Parkhurst and Lalitha Vaidyanathan, FSG
Thank you for joining us!

To download the research presented in this webinar, please go to [www.fsg-impact.org/ideas](http://www.fsg-impact.org/ideas)

Continue the dialogue! Please visit our online wiki where we will respond to questions received today:

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