

Summary of YANA Roundtable on Program Effectiveness

June 19, 2014

Organizers:

Vivien Hoexter (facilitator), Sudip Mukherjee, Michael Davidson and Melinda Hunt

Yang Li (scribe and social media provider)

Andrew Chapman our host at Macquarie Group New York Headquarters.

Introductory comments

Vivien Hoexter (<http://www.vhoexterconsulting.com>) facilitated the meeting and provided a handout with a few key concepts

- Theory of change: see handout for definition
- Counterfactual: see handout for definition
 - Consider that in drug tests, there are control drugs. Now, if you have a workforce program that trains individuals to get certain jobs, in an ideal world, you'd track those receiving training and those who are not (the *counterfactual group*, not control group)
 - If we think about what we aspire to, the gold standard is having one group that is doing what you're planning, and one that is not.
- Net impact: see handout for definition
- Vivien listed a few useful resources on theory of change, education, social program effectiveness (also on the handout)

Breakout discussion groups

- Group 1: how does one align tracking with the organization's mission?
- Group 2: how does one get beyond measuring process to measuring impact?
 - A matter of measuring multiple metrics. In some ways, short-term perspective and in others, the long-term perspective.
 - The metrics you use need to be determined by the "why".
 - Three categories:
 - 1) Stakeholders for the organization (donors, partners, employees)
 - 2) The larger mission (are these metrics moving us closer to the goal?)

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- 3) Marketing/positioning/qualitative data for story telling
- Group 3: how does one go about collecting and tracking data?
 - Some takeaways:
 - Loss of grant because a group was too anecdotal in its reporting—pressure to measure success when it comes to competitive funding
 - Using technology to quantify metrics
- Group 4: how does one evaluate the data, once collected?
 - The process, and what does the data mean?
 - What is key about evaluating data is that it is shared across the organization so that we can get everyone's views. In turn, the views need to be tied to the strategic plan.
- Group 5: how important is it to form partnerships with universities to assist in program evaluating and research?
 - Why would you want to do this? Credibility and knowledge.
 - How important that is depends on your research objectives. Can make a big difference for a professor to say he/she bought in to a system of evaluation. A little bit of time can make a big difference.
 - One of the notions: can you find a donor who is interested in both things—the university and the particular thing you are doing?

Case study: Queens Community House

Sudip Mukherjee provided a case study related to Queens Community House (<http://queenscommunityhouse.org>)

- Three areas of programming:
 - Youth enrichment programs
 - Family services
 - Senior citizens
- Just went through its strategic planning process
 - One strategic priority was enhancing program evaluation and effectiveness. There are 24 different programs.
 - One of the challenges was how to collect data on enriching and providing tools to families. How do we come up with a consistent set of metrics to measure what we're trying to fulfill? We just had our board meeting last week. We spent a good hour and a half on this.

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- Q from audience: what's an inclusive community? What is being excluded?
 - A: Queens is known as a very diverse borough. There are a lot of variables. One thing we see in Queens: there hasn't been a community that builds inclusive communities (may not have caught this right).
- Q from audience: sources of funding?
 - A: 80% of funding comes from gov't contracts
- Q from audience: a lot of that [the programming] must be pre-scripted, right?
 - A: yes
- When we are in a competitive bidding process, the agencies are interested in measuring process. They are really interested in numbers. The foundation and corporate sponsors are interested in impact and why you are doing things.
- Example of the tutoring program—how do we get to measure the program's effectiveness better? We bring kids in to have a different outlet than being out on the streets.
- Vivien: there may be some common objectives of your programs. Measure those...and try to do that across your youth programs.

Best practices from NYTimes/NPCC Nonprofit excellence awards

Michael Davidson (<http://www.boardcoach.com>) gave examples of programs evaluations that work.

- Outcomes management: creating an organization as a learning organization. It is not always about whether you're a social organization. Key is whether you are learning from what you are doing.
- Harlem RBI was a finalist:
 - From sandlot baseball to a \$14MM operation.
 - Their culture: people in baseball love statistics. They love to measure everything in the world.
 - Their outcome management starts from their strategic planning (which they re-do every 3-5 years). They have metrics and a dashboard reported to the board every quarter. They drill down from the strategic plan, all the way down to every program. It is a very structured system.

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- There are many things nonprofits do that are not directly related to social outcomes. People are singing together—not sure what it does, but people feel good. The sector respects individual human beings. Outcomes are really complex—to really have a social impact is an enormous job.
- Stanford Social Innovation Review: one article—“Programs aren’t everything”
 - They said that programs are not what really make a difference in the life of people. It’s really the relationship between the provider and the people. It’s a complex relationship. The real impact comes from the direct service provider.
- In another example: difficulty of having enough staff to provide gov’t-required metrics while trying to determine and measure new metrics
- One audience comment: the hedge fund type funders are looking for more agile program effectiveness [*not sure if I caught this correctly*].

Responsive and effective communications about impact

Melinda Hunt (<http://hartisland.net>) told how communicating effectively was critical to the effectiveness of her organization.

- Organization: the Hart Island project. This municipal cemetery is on Hart Island in the Bronx
 - Melinda’s organization came about from working with people seeking access to this cemetery, which is still run by the city jail. She was very interested in something this large that was unchanged in NYC since the 19th Century and prohibits visitors
- Picking up on Vivien’s idea: “keep it simple and use what already exists,” there is no prototype in the United States for what HIP does. Guarded mass burials are usually associated with war and genocide not municipal burials of unclaimed people and infants
- The two things that were needed:
 - 1) Getting technical people engaged. The people who construct databases often don’t have interesting problems to solve using data.
 - 2) Engaging attorneys to work on something that is a new problem. E.g.—it is not yet determined in NY state law if a woman has the right to visit the grave of their child.
- In any organization, there’s a way to tell your story, break it down into pieces, and bring it to the media to see how the public sees the story.

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There's a way of using data to help people understand problems that they might not know exist and engage them in solving the problems.

- There's a way of using data to build community.
- Q from audience: how do you attract funders? Who are the funders?
 - A: individual contributions are important. We get so much support in terms of pro-bono support. A hedge fund would send us an engineer. They would match every hour in a donation.
- In the financial services world, companies are requiring employees to volunteer with nonprofits in order to move into leadership positions.

Closing

- Lou: the YANA Roundtable has been around for 18 months. This is our sixth program. We've now completed all of the programs we originally set out to discuss. We have an advisory board now.
- Lou will send out an email to ask for feedback on this Roundtable and future RTs. Perhaps we can determine some measures of effectiveness for the RT.
- Thank you to Andy Chapman at Macquarie Capital.
- Next Roundtables:
 - August 6 at a COFFEED location in Long Island City. Topic will be "Building Better Boards"
 - October RT: date October 2014. Topic will be Fundraising