Cost Effective Evaluation: Measuring Performance – Evaluating Success!

Reid A. Zimmerman, PhD, CFRE
RAZimmerman Consulting

3 Simple Questions:

1. Are you any good?

2. Are you getting better?

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1. Are you any good?
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3 Simple Questions:

1. Are you any good?
2. Are you getting better?
3. How do you know?

SHOW ME!!

Nonprofit Results

Peter Drucker
The bottom line in the nonprofit world is “Changed Lives.”

Letts, Ryan & Grossman
“In reality, however, (nonprofit) performance is all about translating caring, believing, and compassion into results.”

High Performance Nonprofit Organizations, 1999
Reasons do we NOT measure performance or evaluate

- Cost
- Time
- Unsure of what to measure
- Unsure how to begin
- Others???

Why you should!!!

- Public Opinion is already evaluating you!
- Gather additional funding
- Provide the best for your clients
- Have a greater community impact

Why you need to!!

- Continue and improve what we are doing well
- Change or correct what we are not doing well
- Decide what we should stop doing
- Begin what we need to do
"Research seeks to **prove**, Evaluation seeks to **improve**…"

M.Q. Patton

Performance Measurement gathers data so that
Performance Management can lead to better outcomes for people and greater community impact.

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First you need Theory

There is nothing so practical as a good theory.

Kurt Lewin (1951)

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Causal Diagram of Beckhard’s Change Formula

(Inertia)

a.k.a. "Cost of Change"

Resistance to Change

---


Pushing Force
(Non-directional)

Dissatisfaction with the Status Quo

(Inertia)
a.k.a. “Cost of Change”

Resistance to Change

Pulling Force
(Directional)
a.k.a. “Desirability of the end state”

Compelling Vision

First Steps
Causal Diagram of Beckhard's Change Formula

Pushing Force (Non-directional)
(Dissatisfaction with the Status Quo)

(Inertia) a.k.a. "Cost of Change"
Resistance to Change

Pulling Force (Directional) a.k.a. "Desirability of the end state"
Compelling Vision

Believability
First Steps

Logic Model

Program Outcome Model

INPUTS → ACTIVITIES → OUTPUTS → OUTCOMES

What is a logic model?

1. Logical chain of events providing blueprint for mission achievement
2. Graphical representation that illustrates the rationale behind a program or organization
3. Depicts causal relationships between activities, strategies, and end results (Outcomes and Impact)
4. Contains goals and performance measures
5. Integrates various activities into a cohesive whole
6. Vehicle for dialogue, planning, performance management and evaluation
**Inputs**

Resources dedicated to or consumed by the program:
- Money
- Staff and staff time
- Volunteers and volunteer time
- Facilities equipment and supplies

**Constraints on the program:**
- Laws / regulations
- Funders’ requirements

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**Activities**

What the program does with the inputs to fulfill its mission:
- Feed and shelter homeless families
- Provide job training
- Educate the public about signs of child abuse
- Counsel pregnant women
- Create mentoring relationships for youth

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**Outputs**

The direct products of program activities
- Classes taught
- Counseling sessions conducted
- Educational materials distributed
- Hours of service delivered
- Participants served
Outcomes
Benefits for participants during and after program activities

- New knowledge
- Increased skills
- Changed attitudes or values
- Modified behavior
- Improved condition
- Altered status

Impact
The effect on the community as a result of the outcomes for a group of people:

- Changes to the quality of life in a neighborhood
- Environmental improvements
- Decline in need for a public service
- Opportunities for a demographic of people

Logic modeling is based on mapping and defining linkages between what we do and why we do it.

Series of If - Then Relationships

IF THEN IF THEN IF THEN IF THEN IF THEN

If I Work Out for One Hour Each Day and watch my diet I Will Burn Calories Than I Consume Lose Fat and Build Muscle Improve My Health & Cardio system Feel Better & Live Longer

Inputs          Activities       Outputs          Outcomes

Assumptions: Healthy enough for exercise and reduced calorie diet is healthy diet
Factors: Health History

8/9/2019
What is your dental hygiene goal?

IF
Toothpaste
Floss
Toothbrush

THEN
Brush 2X/day
Floss daily
Remove plaque
Visit Dentist

IF
Decreased plaque

THEN
Fewer (ideally 0) cavities

IF

THEN
Keep my teeth

Assumptions: Plaque causes tooth decay
Factors: Genetics

What does a logic model look like?

- Graphic display of boxes and arrows; vertical or horizontal
- Relationships, linkages
- Any shape
  - Circular, dynamic
  - Cultural adaptations, storyboards
- Level of detail
  - Simple
  - Complex

Program Goal: _________________________________________________________
Input, Activity, Output or Outcome?

<table>
<thead>
<tr>
<th>Number of housing units rehabilitated</th>
<th>Drawing up renovation plans</th>
<th>Meeting with local farmers and landowners</th>
</tr>
</thead>
<tbody>
<tr>
<td>Percent improvement in soil quality; dollars saved in flood mitigation</td>
<td>Number of businesses assisted through loans and training</td>
<td>Numbers of Volunteers and their commitment</td>
</tr>
<tr>
<td>Repair/Renovation of Houses</td>
<td>Number of people served by water/sewer projects</td>
<td>Zoning Requirements</td>
</tr>
<tr>
<td>Number of acres of agricultural lands with conservation plans</td>
<td>Percent of businesses that remain viable 3 years after assistance</td>
<td>Increases in equity (property value) of rehabilitated houses for low-income families as a result of targeted assistance</td>
</tr>
<tr>
<td>Increased percent of people with access to clean drinking water</td>
<td>State Wetland regulations</td>
<td>Cost of Copper Wiring</td>
</tr>
</tbody>
</table>

3 Simple Questions:
1. Are you any good?
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SHOW ME!!

“In God we Trust... all the rest bring data!”

Dr. W. Edwards Deming
In the absence of measurement, Management will assume the problem is People...

...and People will assume the problem is Management!!

Zimmerman

Measurement is Everywhere!
- APGAR score at Birth
  - Appearance, Pulse, Grimace, Activity, Respiration
- Report Card in School
- Sports Statistics & Scores
- Consumer Reports Stars
- Retirement Portfolio v. S & P 500
- Number of people at a funeral

What measures do you need to fly a plane?
- Altitude
- Remaining fuel
- Compass direction
- Degree heel
- Time/ mileage to destination
- Airspeed
- Engine performance/rpm

8/9/2019
And...it depends on WHAT you are flying....
A Cessna....

Or an F-16!

Process is Important

{ But.....the best flying ultimately has an even number of take-offs and landings!!}
The information is in front of you

- Gathering the information is the easy and inexpensive part.
- Making sure it is valid and reliable is challenging.
- Using it and learning from it is the most difficult.

Sir Josiah Stamp, 1911

English Economist (1880 – 1941)

“The government ministries are very keen on amassing statistics. They collect them, raise them to the nth power, take the cube root, and prepare wonderful diagrams. But you must never forget that every one of these figures comes in the first place from the village watchman, who just puts down what he damn well pleases.”

The Little Engine that Could

Applauded for heroic effort

YET:

We don’t know if any toys actually got to the boys and girls or if they liked and played with them.

We do know that the train got in to the station – LATE!
Data is Data
- Data is what you collect – it is not information
- Information is what comes from data – it is not evaluation
- Evaluation is the analysis and application of data and information – by itself, it is not a performance driver
- Evaluation can be used by leadership to drive performance, improve a program, and have a greater impact on the community.
- Performance management systematically ties data, measurement, practice and procedures all together in an organization.

If your organization were successful, what would you SEE, HEAR, FEEL and DO?

<table>
<thead>
<tr>
<th>More</th>
<th>See</th>
<th>Hear</th>
<th>Feel</th>
<th>Do</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Less</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Fire Department / Rescue

<table>
<thead>
<tr>
<th>Quantity</th>
<th>Quality</th>
</tr>
</thead>
<tbody>
<tr>
<td>Input Size of</td>
<td>Department, Area of service coverage</td>
</tr>
<tr>
<td>Activity</td>
<td>Responding to 911 calls or fires, Prevention, inspection, and investigation</td>
</tr>
<tr>
<td>Outputs Number of</td>
<td>Response Time</td>
</tr>
<tr>
<td>Outcome / Impact</td>
<td>Number of Fire Related Deaths, Fire Related Deaths per 100,000 Population</td>
</tr>
</tbody>
</table>
### Health Clinic or Practice

<table>
<thead>
<tr>
<th>Quantity</th>
<th>Quality</th>
</tr>
</thead>
<tbody>
<tr>
<td>Input Number of Patients presenting for TX</td>
<td>Severity of patients and population, Health issues of community, Skill levels of clinicians</td>
</tr>
<tr>
<td>Activity</td>
<td>Diagnosis, treat, follow-up</td>
</tr>
<tr>
<td>Outputs Number of Patients treated or served</td>
<td>Number of patients treated in less than an hour, Number of return visits, Prevention Education</td>
</tr>
<tr>
<td>Outcome / Impact Incidence of trauma or preventable disease in community</td>
<td></td>
</tr>
</tbody>
</table>

### Education

<table>
<thead>
<tr>
<th>Quantity</th>
<th>Quality</th>
</tr>
</thead>
<tbody>
<tr>
<td>Input Number of Students, Number of Teachers</td>
<td>Level of student ability, Teacher Experience or credentials</td>
</tr>
<tr>
<td>Activity Teaching hours in class, Counseling Students</td>
<td>Teacher/student ratio, Richness of extra-curricular activities</td>
</tr>
<tr>
<td>Outputs Number of Students in class this term, Number of dropouts, Number of students graduating</td>
<td>Percent graduating with honors, Percent accepted to college</td>
</tr>
<tr>
<td>Outcome / Impact Number of graduates working after graduation</td>
<td>Percent getting good jobs within 12 months</td>
</tr>
</tbody>
</table>

### Program Outcome Model

[Diagram showing Inputs, Activities, Outputs, Outcomes]
Outcomes and Indicators

Transfer the outcomes from your logic model into the first column of this worksheet. Then use the remaining columns to identify up to three potential indicators for each outcome.

<table>
<thead>
<tr>
<th>Outcomes</th>
<th>Indicators</th>
<th>Indicators</th>
<th>Indicators</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
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</tbody>
</table>

Select the most meaningful, relevant, important outcomes from your logic model and write them in this column.

For each outcome, identify the specific, measurable information that will be collected to track success toward that outcome.

Is there another possible indicator?

Another?

Evaluation Plan: Part I (Data collection methods)

Select outcomes from the "Outcomes and Indicators" table. Identify for each outcome the data collection method(s) you will most likely use and the schedule for your data collection.

Select the outcomes that will be measured and write them below.

Outcome Indicator What data collection method? When will data be collected?

Evaluation Plan: Part II (Data collection procedures)

Transfer the information on data collection methods from the "Evaluation Plan: Part I" to the first column in this worksheet. Identify for each method the data collection procedures you believe will help you manage your data collection process.

Write the data collection methods from Part I, below.

What data collection method? Who will collect data? What will they do? How will data collected be monitored?

<table>
<thead>
<tr>
<th>What data collection method?</th>
<th>Who will collect data?</th>
<th>What will they do?</th>
<th>How will data collected be monitored?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
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</tbody>
</table>
Team Approach

- Leader Driven
- Data collected at point of access
- Jointly understood and accepted
- Balanced and joint work process

Characteristics of Measures

- Useable for Management
- Easily Collectable
- Staff Driven
- Sometimes Embedded in Story
- Meaningful for a variety of applications

Getting information...

- Surveys:
  - Client Satisfaction
  - Client Outcomes
  - Others
- Focus Group
- Pre/Post Questionnaire or Survey
- Comparative results with others
- Review of Case Notes
- Observation
Overall, how satisfied or dissatisfied are you with our Food Shelves?

☐ Very satisfied
☐ Satisfied
☐ Neither Satisfied nor Dissatisfied
☐ Dissatisfied
☐ Very Dissatisfied

What did you do as a result of getting food from the food shelf this month? (Check all that apply)

☐ Paid my house payment
☐ Put money in savings
☐ Bought medicine/prescriptions
☐ Paid a utility bill
☐ Bought other food
☐ Sent money to family or friend
☐ Paid an overdue bill
☐ Fixed my car/truck
☐ __________________________
☐ __________________________

Only so many things you can ask people about...

1. Opinions – Agree or Disagree
2. Knowledge – T or F
3. Behavior – Frequency
4. Feelings – List of adjectives or semantic differential
How you ask makes all the Difference

What is your opinion of Crazy Justin's auto-repair?
- Pretty good
- Great
- Fantastic
- Incredible
- The Best Ever

How likely are you to go out for dinner and a movie this weekend?
- Dinner and Movie
- Dinner Only
- Movie Only
- Neither

I had an enjoyable stay at your hotel…
- Agree / Disagree (Opinion)
- T / F (Knowledge)
- Always / Often / Sometimes / Never (Behavior)
The accommodations were 5 Star…
- Agree / Disagree (Opinion)
- T / F (Knowledge)
- Always / Often / Sometimes / Never (Behavior)

I plan to stay at this hotel again…
- Agree / Disagree (Opinion)
- T / F (Knowledge)
- Always / Often / Sometimes / Never (Behavior)

Let’s See…
Level
Trend
Comparison
Important
Integrated
Politics and Publicity of Measuring

It is always important to determine ahead of gathering data, who will use the data or information and for what purpose.

Do any of you remember the name of a large gathering of African American Males in Washington D.C. in 1995?

1. Who gets counted? Women? Children?
2. Do Spectators count?
3. When will counts be made?
4. What about transients – those who came/left?
5. What is the geographical boundary?

Million Man March
(10-16-1995)

6. Sympathy & Support Marches in other cities…do they count?
7. A single number or variability? 900 K – 1.1M
8. Who should do the counting?
9. How should data be analyzed before publication?
10. Who should publicize the results?

MMM cont.
Reid Zimmerman’s new CharityChannel Press book is a treasure-house, a tour de force of how to do things right and how to improve in a nonprofit organization. From the beginning of a nonprofit to one long in the tooth, this volume needs to be well-thumbed and on the agency bookshelf. … Jim Toscano on Amazon.com

$30 TODAY – signed!!

Reid A. Zimmerman, PhD, is the author of the chapter “Measuring Success and Making Change with Evaluation” in a new book from Charity Channel that draws on the peer-reviewed work of forty-three contributing authors. The book, In the Trenches – You and Your Nonprofit, provides a good overview of current nonprofit sector thinking about nonprofit leadership, management and fundraising.

https://charitychannel.com/professional/you-and-your-nonprofit/

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