

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

Webinar Agenda

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

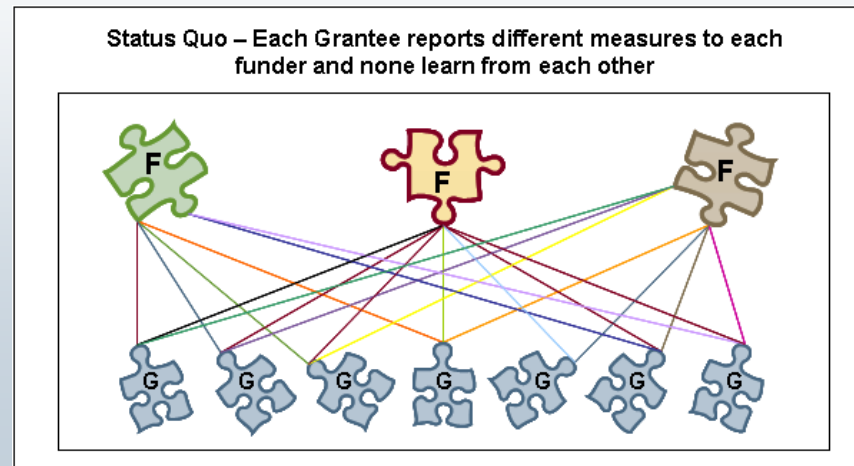
The Strive Collaborative: From Inception to Impact

Jennifer Blatz, Strive

Audience Questions & Answers

Mark Kramer, Marcie Parkhurst, Lalitha Vaidyanathan, and Panelists

Current State of the Field

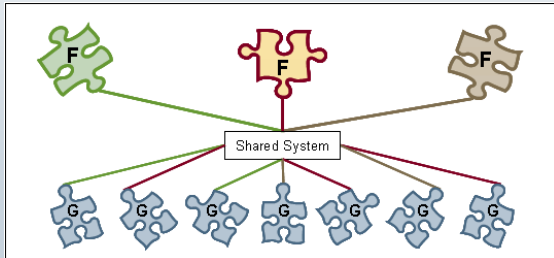


- Nonprofit performance measurement driven by funders focuses on the impact of individual grants
- Using inconsistent measures, neither funders nor nonprofits can compare the relative effectiveness of different approaches
- Developing separate evaluation processes leads to substantial costs and burdens
- There are limited incentives for collaboration

A fragmented approach undermines the social sector's ability to solve large, complex problems

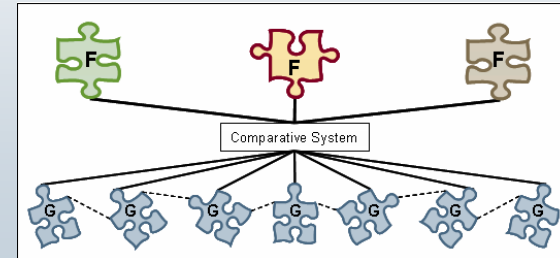
Overview of Shared Metrics Systems

1 Shared Measurement Systems



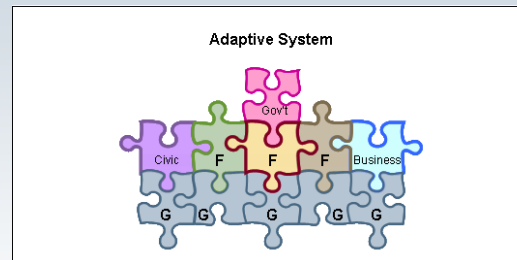
A common platform to report different goals and measures

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

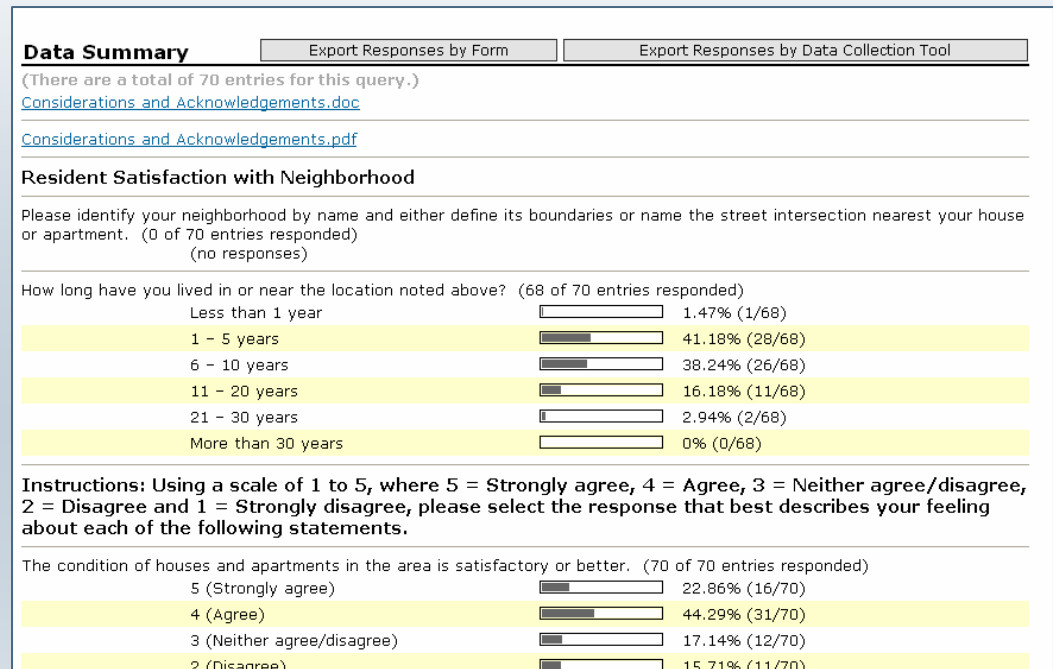
Three Types of Shared Measurement Systems - Cumulative Benefits

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

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 including:**
 - NeighborWorks America
 - Wachovia Regional Foundation
 - F.B. Heron Foundation
 - Habitat for Humanity International



- **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

Cultural Data Project: Our Mission



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

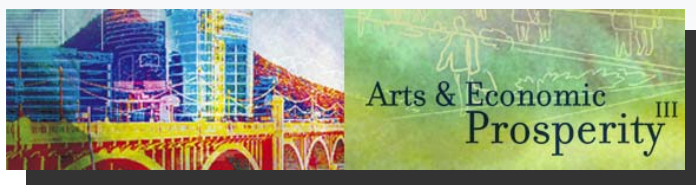
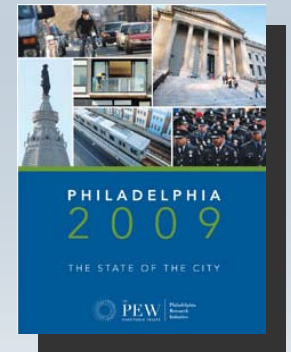
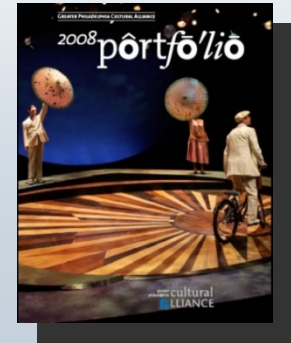
Providing Robust Data for Research



Types of Research and Reports possible:

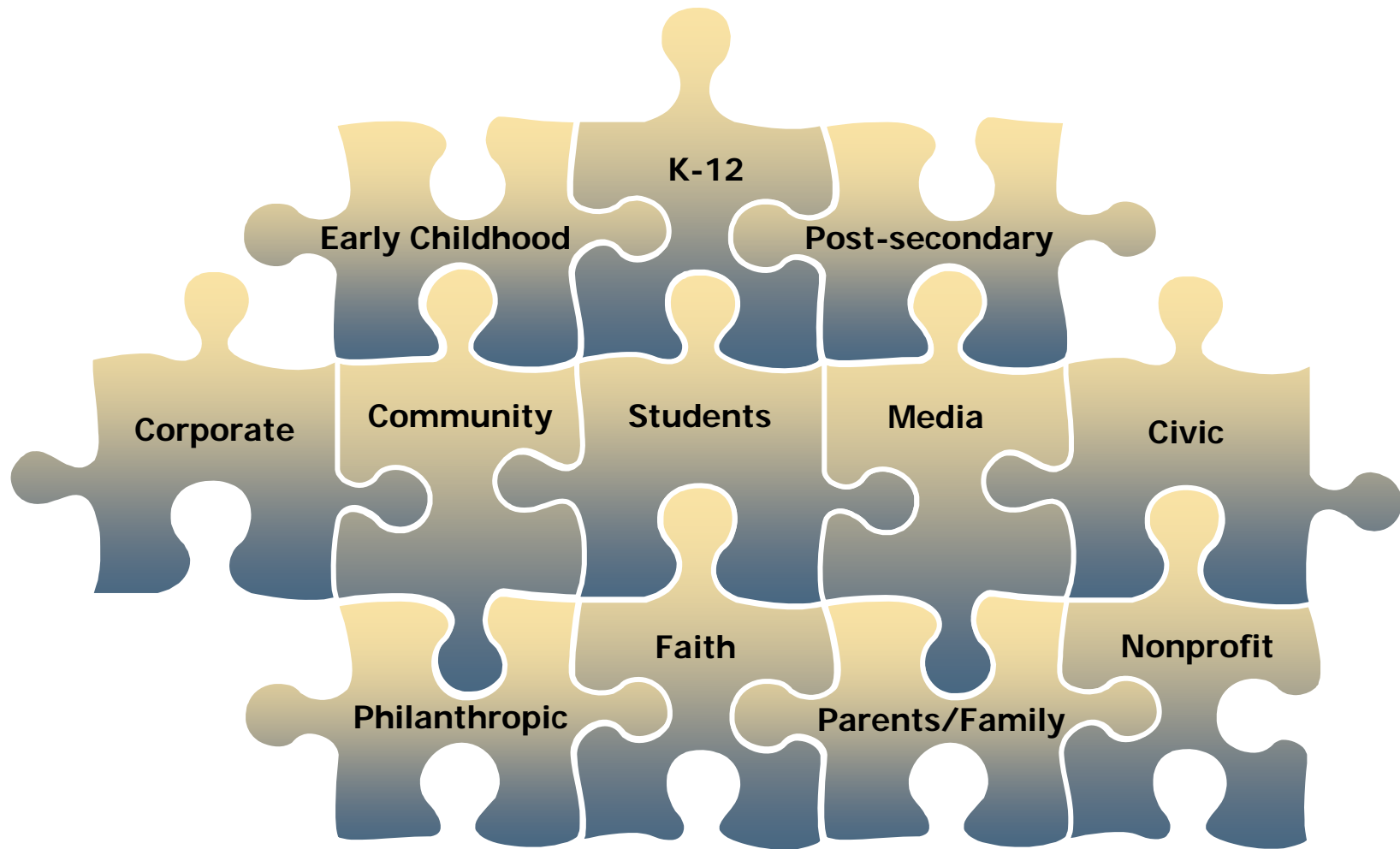
- Broad analysis or overview of the cultural sector
- Economic impact analysis
- Regional cultural planning
- Economic development planning
- Needs assessments (sector and disciplines)
- Organizational health and capacity

(Full reports available at www.culturaldata.org)



Overview of Strive

www.strivetgether.org



Strive: Outcome Measures



Goal 1:
PREPARED for School

- Percent of children assessed as ready for school

Goal 2:
SUPPORTED In and Out of School

- Percent of students with more than 20 developmental assets

Goal 3:
SUCCEEDS Academically

- Percent of students at or above reading/math proficiency
- Percent of students who graduate from high school

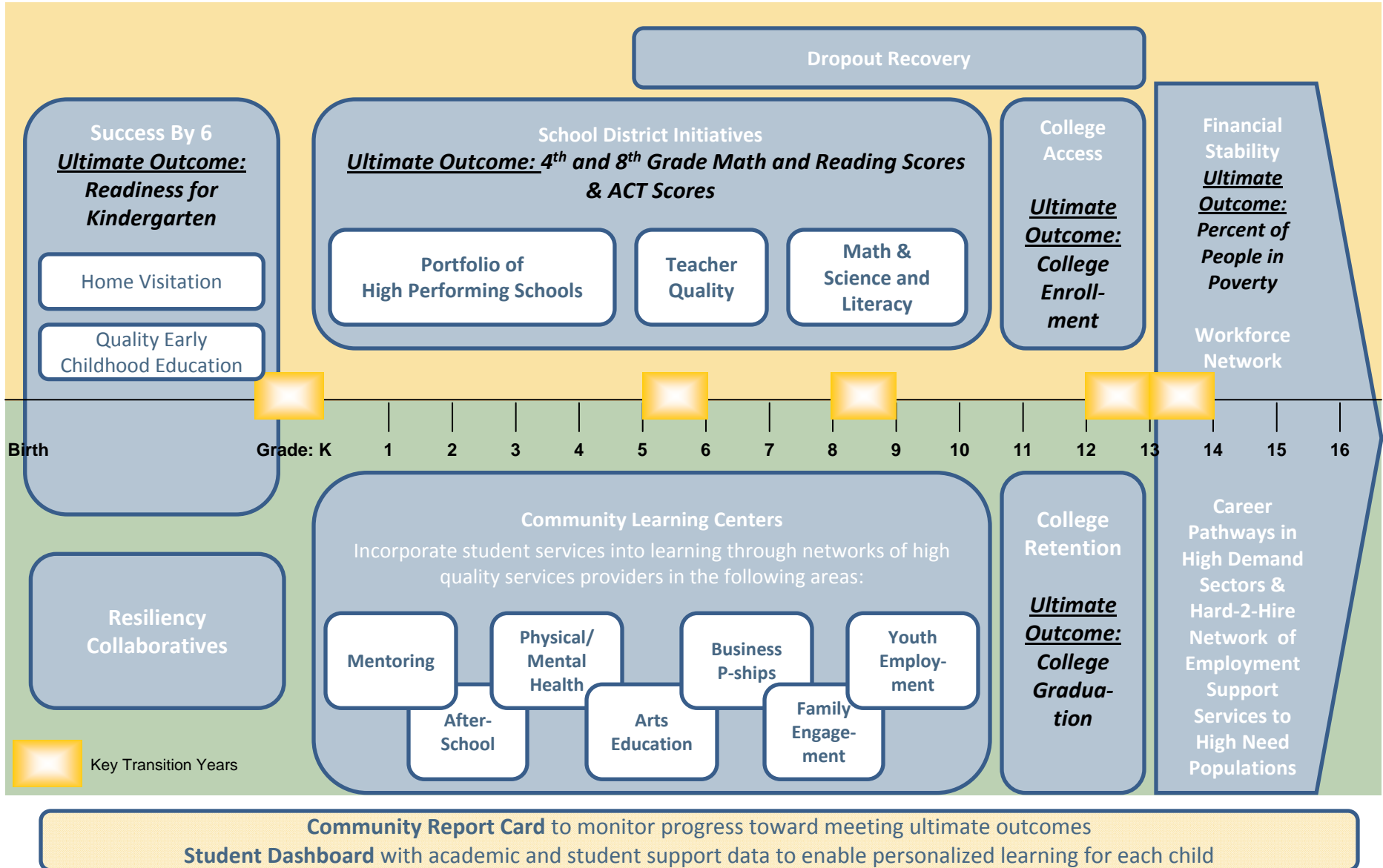
Goal 4:
ENROLLS in College/Career
Training

- Average score on the ACT
- Percent of graduates who enroll in college

Goal 5:
GRADUATES and **ENTERS** a career

- Percent of students prepared for college level coursework
- Percent of students who are retained in college
- Percent of students who graduate from college
- College Degrees conferred

Strive Student Roadmap to Success: Key Strategies and Outcomes



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



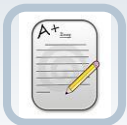
Effective use of web-based technology



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



Mark Kramer



Marcie Parkhurst



Lalitha Vaidyanathan



Marian Godfrey



Neville Vakharia



Jennifer Blatz

Thank you for joining us!

To download the research presented in this webinar,
please go to www.fsg-impact.org/ideas

Executive Summary



Full Report



Case Studies



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

<http://sharedmeasurementapproaches.pbworks.com/Webinar+on+Shared+Measurement--Questions+and+Answers>

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And please join us at the bi-annual GEO National Conference



**April 12-14, 2010
Pittsburgh, PA**

*For registration information, please visit:
www.geofunders.org*