

FINDINGS FROM A SYMPOSIUM

# HOW AND WHY NONPROFITS USE OUTCOME INFORMATION

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Aspen Institute's Nonprofit Sector Research Fund  
INDEPENDENT SECTOR  
United Way of America



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# HOW AND WHY NONPROFITS USE OUTCOME INFORMATION

The Urban Institute  
Washington, D.C.



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# 1

## SECTION

# Introduction

As nonprofit organizations perform an increasingly important role in delivering human services, there is also increased pressure for greater accountability—to funders and other stakeholders, including the public. Current perceptions of accountability go beyond traditional interests in efficiency to include effectiveness in helping their clients.

Outcome data is often used to help measure effectiveness and more nonprofits are involved in collecting these data each year. But it is still rare to find this valuable information being used to help improve the way services are delivered. Most often, it is reported to funders as a requirement under a grant and is put to little, if any, internal use by the organization. Many organizations do not appreciate or understand the potential usefulness of outcome information for improving services.

On June 26, 2002, a Symposium sponsored by The Urban Institute, the Aspen Institute's Nonprofit Sector Research Fund, INDEPENDENT SECTOR, and United Way of America convened a group of about 30 participants from a variety of perspectives to discuss the uses of outcome information by nonprofits and the factors that affect use. Funding support was provided by the Aspen Institute's Nonprofit Sector Research Fund and the David and Lucile Packard Foundation.

There were attendees from local service nonprofit organizations, regional organizations (such as local United Way chapters), national service organizations with interest in outcome measurement (such as Boys and Girls Clubs of America and Big Brothers Big Sisters of America), national organizations (such as United Way of America and INDEPENDENT SECTOR), and private foundations. A list is included at the beginning of this report.

This symposium built on a previous symposium held in June 2000, sponsored by the same organizations. That meeting focused more broadly on the current status of outcome management and resulted in the report *An Agenda for Action: Outcome Management in Nonprofit Organizations*, available at <http://www.urban.org>. Because a major conclusion was that nonprofits needed encouragement to use their regularly collected outcome information to help them improve services to clients, the second symposium concentrated on this topic.

## SCOPE OF THE SYMPOSIUM

This symposium provided a forum to discuss in detail the *uses* of the outcome information by nonprofit organizations, with a focus on those that provide direct services to clients.

The emphasis was on the *use* of outcome information as an integral part of what has become known as *outcome management*. The symposium was not concerned with the techniques of *outcome measurement*, except for elements of outcome measurement that become factors in limiting the use and utility of the outcome information. The symposium used the following definitions in distinguishing these two concepts and the related concepts of *outcomes* and *outcome indicators*.

- *Outcome management* refers to the interpretation and use of outcome data, particularly to improve services to clients. The term encompasses outcome measurement, which provides a basic source of information for outcome management.
- *Outcome measurement* refers only to the procedure of identifying and collecting data on program outcomes. It involves (1) the identification of outcomes; (2) the development of appropriate outcome indicators and data collection procedures; and (3) data analysis to better understand organization achievements.
- *Outcomes* refer to the specific results that service organizations seek, such as improving client conditions.
- *Outcome indicators* refer to the specific measurements of the desired results, such as “number, and percent, of clients whose condition improved after receiving services.”

Participants at the symposium discussed their experiences and insights in small group sessions. These were followed by plenary sessions to share key points with the larger group.

## NEXT STEPS

The symposium closed with a plenary session to discuss next steps. A number of suggestions were offered by symposium participants to advance the collection and use of outcome information in nonprofit organizations. A key suggestion that most participants agreed on is the need for improved technology both for collecting and analyzing outcome data.

Participants also wanted to have examples of uses of outcome data in other nonprofit organizations. There is no set of industry standards or generally accepted practices guiding how outcome information is collected and used in the nonprofit sector.

There was strong support for institutionalizing the collection and use of outcome information widely not only *across* the nonprofit sector, but also *internally* within nonprofit organizations. Nonprofits should establish a structure and regular process that emphasizes the importance and value of outcome data.

## REPORT FORMAT

This report, written by Harry Hatry, Linda Lampkin, Elaine Morley, and Jacob Cowan, summarizes the discussions at the symposium. Section 2 presents the uses of outcome information by nonprofit organizations identified by the participants. While it lists both internal uses and external uses, the primary focus is on internal use for improving services.

Section 3 discusses factors that symposium participants identified as affecting the use of outcome information, either negatively or positively. The factors are grouped into five categories, including organizational climate, funding, staffing, outcome measurement process, and technology.

# 2

SECTION

## Uses of Outcome Information

Symposium participants were asked to identify ways that nonprofit organizations can use outcome information to improve services. Their responses are grouped into (a) internal uses (such as identifying what works well, what needs improvement, and what changes are needed) and (b) external uses (such as reporting to funders, donors and volunteers, marketing programs and services, and fundraising). These uses are summarized in exhibit 1 and discussed below.

### INTERNAL USES

The most basic use of outcome information is to suggest program modifications that improve services and thus improve outcomes. But there are many ways that such modifications occur. For discussion, we have grouped them into a number of categories.

**Clarifying Agency and Program Purposes for Staff.** Just implementing outcome monitoring was reported as having value for the organization at all levels, including members of the

board, as the process helps staff more clearly understand the purposes of their work and encourages them to focus on achieving those objectives. The content of the work tends to shift to the outcomes sought. A participant noted, “Making staff aware of goals has affected program design and delivery.”

Some participants noted that developing a “logic model”—a tool used to help identify the linkage between program activities and outputs to desired outcomes—is often useful by itself. Logic models can help managers and other staff better understand what their services are intended to accomplish, and how intermediate outcomes lead to desired end outcomes.

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*When KCMC Child Development Corporation began focusing on outcomes for its early childhood development program, it found that existing program content was not what was needed to achieve the desired outcomes. The curriculum was substantially rewritten and the staff retrained to help the children achieve the skills identified as outcomes (for example, literacy and knowledge of language).*

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**Outcome information can be used not only to identify programs with disappointing outcomes, but also to identify good outcomes and, thus, good practices. The outcomes might be for**

- the program as a whole.
- particular client demographic groups.
- particular locations where there are multiple facilities or units providing the same services.
- specific staff members.

Having the outcome data can “formalize what is intuitive,” that is, provide convincing evidence about what works and what doesn’t.

tions where there are multiple facilities or units providing the same services; or even (d) specific staff members.

One participant pointed out that organizations have to be willing to discontinue programs that do not work to focus resources on programs that better accomplish the organization’s mission.

**Identifying What Works and Good Practices.** Outcome information can be used to identify not only programs with disappointing outcomes, but also those with good outcomes and, thus, good practices. A participant noted that having the outcome data can “formalize what is intuitive,” that is, provide more convincing evidence for staff perceptions that their programs are successful in helping clients.

Some organizations may have access to outcome data from other organizations providing similar services. If others report considerably more positive outcomes, this information could be used to identify and adapt service delivery practices of these other organizations. (This is a variation on the “best practices” concept. Managers compare outcomes of different programs, or variations of the same program.)

This is a role played by some national service organizations that serve local organizations providing a specific kind of service. A national service organization official for organizations providing youth services pointed out that outcome information is used to identify programs that work. She noted, “When we find the intervention that creates the greatest change, we put our money in it and try to encourage others to do it” (that is, encourage other affiliated organizations to adopt that type of intervention).

### **Identifying Where Improvement Is Needed.**

This is probably the most common internal use of outcome information by nonprofit organizations. According to one symposium participant, “Negative outcome data (that is, outcomes that are not as good as expected or desired) show the need for change.” Thus, regularly collected outcome data can trigger changes in services and programs. A caseworker may adjust service delivery plans for a client because of outcome information obtained in early sessions. For example, an organization providing services to the elderly assesses the ability of each client to perform certain functions and this helps determine whether the client can remain at home or additional services.

Supervisors observing poorer outcomes than expected can then look for causes and take appropriate action. The disappointing outcomes might be for (a) the program as a whole; (b) particular client demographic groups; (c) particular loca-

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*After Northern Virginia Urban League reviewed the results of its regular surveys of single mothers participating in its program, it concluded that clients needed more than one visit per month and modified its services accordingly.*

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*Big Brothers Big Sisters of Central Maryland compared outcomes for students enrolled in school-based mentoring programs to those in community-based programs. The information was used to convince its board to support expansion of the school-based mentoring program to additional schools.*

Other participants wanted to see outcome data used to help innovate—to test ideas for new or modified program practices or to determine which of two different approaches might achieve better results.

Outcome data can be used to create “learning organizations,” as improvements can be regularly and continuously made based on the problems and good practices identified. Participants suggested the use of “peer learning groups” that allow staff to learn from others who work in the program that achieved better outcomes.

**Informing, Training, and Motivating Staff.** Improving the knowledge and motivation of organization personnel is a major part of improving services to clients. The list of ways to use outcome information to inform, train, and motivate staff includes the following:

*Identify special staff training or professional development needs.* Staff may need training in handling particular categories of clients for whom the outcomes have been disappointing, or may identify a need that requires the addition of a certain component to the services (for example, improving money-management skills when post-service outcomes indicate continued financial problems for former clients).

*Revise the “curriculum” in services that provide training or inform or educate clients on particular topics (such as substance abuse prevention).* For example, feedback from community employers who have hired the clients of employment and training programs can provide vital information on the training that the nonprofit organizations should be providing.

*Guide staff in interactions with clients.* Information from client surveys that ask about the helpfulness of particular approaches by staff may indicate that changes are needed.

*Increase awareness of organization and program outcome goals.* This can help focus staff on what objectives are most important.

*Create a “problem solving environment” within the organization to help motivate staff.* At regular (perhaps quarterly) “how are we doing” meetings, a supervisor can review the most recent outcome information report with staff members, discuss reasons for poor outcomes, and identify possible modifications that may lead to improvement. Such meetings can also serve as a forum to recognize good or improved performance.

**Outcome information can be used to create a “problem solving environment” and help to inform, train, and motivate staff by**

- Identifying training and professional development needs.
- Guiding staff in modifying interactions with clients.
- Increasing awareness of organization and program outcome goals.

*Link outcome indicators to employee evaluations or incentives in a positive manner. Outcome information can provide an objective basis for employee appraisals—if employees accept that the outcome indicators chosen are reliable and appropriate.*

*Incorporate outcome information as part of organizational planning and status reports. This can motivate employees as they can see their contributions to the “bigger picture.” It also helps staff not involved in direct service delivery, such as accounting departments, to understand how their roles affect clients and services.*

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*When Crossway Community’s Health Careers employment training program initially rated its caseworkers on the number of clients graduating from the program, there was an incentive to rush clients through the program and into jobs. The indicator for staff was modified to emphasize client retention in jobs as an outcome. (This required collecting data on client outcomes at some point after program completion, such as 6 and 12 months.)*

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**Outcome data on individual clients can be used to**

- Identify the need for changes to existing interventions.
- Identify categories of clients for which outcomes have not been as successful as for other clients.
- Inform the clients about their progress and motivate them to future improvement.
- Show that the program works and helps clients to envision similar improvements for themselves.

*Identify the need for staff, volunteer, and leadership behavior changes. This should occur at all levels of management.*

**Seeking Explanations for Outcomes.** Identifying the programs that have good or poor outcomes is only the first step. It is just as important to identify the reasons. Reporting outcomes by different program characteristics or client demographics helps identify what factors are associated with better outcomes.

The outcome information itself can sometimes provide some explanation of results. For example, differences in outcomes may be evident when data are broken out by client demo-

graphic characteristics (such as gender, age, race/ethnicity), severity of client’s problem at entry into the program, program delivery approach (such as length and frequency of sessions), or by staff member. (While reporting outcomes by staff members can help managers assess staff and identify the need for training and improvement, participants noted that this use of outcome information must be done carefully to avoid adverse impacts on staff morale and turnover.)

**Identifying Trends and Making Other Comparisons.** Making comparisons using the outcome data gives organizations a basis for assessing how a program is doing and identifying its strengths and weaknesses. The types of outcome comparisons often used include the following:

*Different time periods, to identify whether achievements are improving, remaining stable, or worsening. Although this can provide early warning of a growing problem and might be useful for*

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*An affiliate of Big Brothers Big Sisters has started collecting outcome information on schools offering its mentoring programs, to try to identify what factors appear to be associated with better youth outcomes. For example, some schools provide a quiet room for mentor/student meetings. If data from these schools show better outcomes, the program manager will be able to demonstrate that quiet space should be provided for the mentoring program. If a school is unwilling to do this, then management might consider dropping that site and choosing another where conditions are more likely to lead to better student outcomes.*

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organization strategic planning, it is not yet commonly used. (This use of outcome information requires collection of the same outcome data over time.)

*Similar services provided to different client demographic groups.* This can help identify practices that need to be more tailored for particular client groups and, perhaps, indicate that goals should be different for various client groups.

*Various staff members working in the same program.* Comparisons can help managers assess their staff and identify those who need additional training, supervision, or guidance.

*Same program in multiple sites.* This can help identify “good practices” and sites that need attention and assistance.

*Similar programs for similar populations offered by other organizations.* Some participants indicated that such comparisons

could provide them with a better sense of how good their outcomes were compared to other organizations and to identify program practices that appear to be associated with better outcomes.

**Using Outcome Data to Help Motivate Clients.** While relatively uncommon, outcome data for individual clients can help to inform them about their progress and provide motivation for future improvement.

Outcome information also demonstrates that an organization’s program works and illustrates what other clients have achieved. This is believed to encourage clients to envision similar improvements for themselves, thus helping them to take actions to improve their own condition.

**Giving More Voice to Clients.** Some participants felt that obtaining feedback from clients through surveys was useful because it provided a systematic way for clients to be heard.

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*Crossway Community in Maryland provides a range of services to low-income, high-risk families. Periodically, parents in these families are interviewed about their income, housing, employment, family life, and other issues. Caseworkers believe that providing information on the changes in their lives helps motivate clients and encourages feelings of accountability for their own progress.*

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**Supporting Budgeting and Planning.** Outcome information is useful as resource allocation decisions are planned and made. This includes developing and justifying program budgets, as well as developing organizational plans. The organization will be better able to prioritize its limited resources if the outcomes of various programs are known.

### Organizations also use outcome data to

- Support budgeting and planning decisions.
- Set priorities for programs.
- Facilitate in-depth studies and program evaluation.
- Inform and educate the board of directors.

While participants did not discuss this in depth, it is assumed that such information would help justify the need for altering resources (up or down) and timetables on particular programs based on level of achievement of outcomes.

**Facilitating In-Depth Studies and Program Evaluation.** Outcome data can improve the ease and quality of special studies and program evaluations for an organization. The regularly collected outcome information is likely to provide basic information needed for such studies.

The process of program evaluation is more rigorous than ongoing outcome monitoring and often includes collecting data on comparison or control groups as well as on program participants. Program evaluations are typically conducted by outside evaluators, rather than the organizations themselves, and are usually completed infrequently.

National service organizations can also use outcome information obtained from their local affiliates in special studies to identify high performers, if there are data available on a similar set of core outcome indicators from a number of affiliates. The resulting information on “good practices” can then be disseminated to all affiliates.

Nonprofits with an outcome measurement process can probably undertake their own small scale program evaluations using their existing procedures. The outcome indicators and data collection procedures, such as program records and client surveys, can sometimes be readily adapted for use for the special studies.

**Informing the Board of Directors.** Board members have both external and internal responsibilities. They help present their organizations to the outside world but also play key roles in guiding the organization’s work. Thus, they, too, need information on how well the programs are working and should encourage the collection and use of outcome information. Providing this information to board members is another way to encourage a “culture of analysis.”

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*Northern Virginia Urban League used outcome measures to convince board members that it was necessary to hire more professional staff for effective and timely client intervention rather than relying on volunteers who came sporadically to complete the meetings with clients.*

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## EXTERNAL USES

The most common reason that nonprofits collect outcome information is that it is required by external users. Funders are increasingly requiring such information as a condition of a grant and for justification of additional support.

**While funders are often the primary reason that outcome information is collected, there are other external uses for the data:**

- Increasing accountability to the community.
- Providing data for marketing and fundraising efforts.
- Attracting volunteers and clients.
- Sharing with other organizations.

“value” of a program or organization. This can help organizations demonstrate that they are making a difference.

**Attracting Volunteers and Clients.** Nonprofit organizations also can use outcome information to market their programs to potential clients and to recruit and retain volunteers or staff.

**Helping Other Organizations.** Although not yet common, cross-organizational sharing of outcome information could be very helpful. Symposium participants noted that “Lessons Learned” forums across agencies could enable similar organizations to share what they have learned about factors that affect program outcomes, good practices, and steps to improve program outcomes. Conferences or meetings of similar organizations, professional organizations, or affiliates of national service organizations might serve as a forum for such information sharing.

Data on appropriate outcome indicators and tools and practices to collect outcome information can also be shared, potentially saving development time and cost for other organizations and leading to improved client outcomes for all.

**Suggestions from Participants for Making Outcome Information More Useful.** In the process of the discussions, symposium participants also listed suggestions for making the outcome information more effective:

- Resist the temptation to “fudge” or shape indicators to emphasize areas in which the organization is doing well.

**Increasing Accountability to Funders and the Community.** Many funders view outcome measurement and reporting as a key element in accountability, both for their own purposes and for the community. Grantees may provide regular reports on outcomes to funders. Accountability to the community may be addressed by including outcome information in annual reports, newsletters, and on web sites.

**Providing Data for Marketing and Fundraising.** Outcome information is very useful in proposals for grant funding, annual reports, newsletters, and fundraising material, as it demonstrates the

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*Big Brothers Big Sisters of Central Maryland plans to use its outcome data to help attract more volunteers to its mentoring programs. Agency officials believe that their emphasis on results, and demonstration that mentors make a difference in the lives of children, will help attract new volunteers.*

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- Involve staff in identifying appropriate outcome indicators, by asking up front what they need to know, and how they would use the information.
- Link outcome indicators to program mission/objectives/goals. This works if top management is committed to using outcome management for learning and improving, looking for solutions as opposed to finding people to blame.
- Use a “logic model,” a tool sometimes used to help identify the linkage between program activities, outputs, intermediate outcomes, and end outcomes. Logic models can help managers and other staff better understand what their services are intended to accomplish, and how intermediate outcomes lead to desired end outcomes.

### EXHIBIT 1

#### Basic Uses for Outcome Information

##### Internal Uses

1. Clarifying Agency and Program Purposes for Staff
2. Identifying Where Improvement Is Needed
3. Identifying What Works and Good Practices
4. Informing, Training, and Motivating Staff
5. Seeking Explanations for Outcomes
6. Identifying Trends and Making Other Comparisons
7. Using Outcome Data to Help Motivate Clients
8. Giving More Voice to Clients
9. Supporting Budgeting and Planning
10. Facilitating In-Depth Studies and Program Evaluation
11. Informing the Board of Directors

##### External Uses

1. Increasing Accountability to Funders and the Community
2. Providing Data for Marketing and Fundraising
3. Attracting Volunteers and Clients
4. Helping Other Organizations

# 3

## SECTION

# Factors That Affect the Use of Outcome Information

Symposium participants were asked to identify factors that influence the use of outcome data in nonprofits. Although factors were introduced separately as positive and negative, most can be viewed from either perspective. For example, all groups identified financial resources as a factor. The availability of financial resources has a positive effect on the use of outcome information when an organization has funding to spend on outcome measurement activities. Scarce funding is a negative factor impeding the use of outcome information.

Factors identified by participants covered a broad range of issues. We have grouped them into five categories:

- organizational climate;
- funding;
- staffing;
- outcome measurement process; and
- technology.

Each factor is described below. (In some instances, a factor could be included in more than one of the five categories.)

### Two major themes were repeated across the breakout sessions with symposium participants:

- For outcome data to be used, the staff and organization must create a culture that is supportive of outcome management.
- The more resources (funds, time, staff) invested in outcome management, the more likely that outcome data will be used.

## ORGANIZATIONAL CLIMATE FACTORS

**Program staff's view of outcome measurement—as a process to learn more about programs so they can be improved or a punitive process used to fault programs.** This former

perspective is a more productive view of outcome management and more readily accepted by program staff. Outcome data, whether positive or negative, can be used constructively to improve services to clients.

**Involvement of program staff in developing the organization's outcome measurement program.** A sense of ownership and investment in the use of outcome data can be empowering for employees. Involving staff in developing outcome measures for an agency furthers their understanding of how using outcome information benefits the organization.

**Support of both program staff and organizational leadership.** Outcome management is at times a resource-intensive process. The support of both staff and leadership is important to ensure that the organization commits to putting the outcome management structures and processes in place. This includes providing time and providing resources (e.g., funding, technology) to support the collection and use of data.

**Several factors contribute to how organizations and their staff perceive outcome measurement processes. This perception impacts whether they will use outcome information to change and improve their programs. Relevant factors include**

- Extent to which outcome measurement is viewed by program staff as a process to learn more about programs so they can be improved rather than a punitive process used strictly to fault programs.
- Level of involvement of program staff in developing the organization's outcome measurement program.
- Extent to which both program staff and organizational leadership support the use of outcome information.
- Board involvement in outcome management.

**Integration of outcome management as a regular staff job responsibility.** Staff are in a much better position to use outcome data if outcome measurement is a regular part of their job, rather than an added responsibility. One way to accomplish this is to incorporate data collection as part of standard client intake and tracking procedures. Another is to empower staff with sufficient responsibility to make changes based on outcome data. Program managers and case-workers are often the people best positioned to use outcome data. Thus it is important for them to be responsible for using it.

**Board involvement in outcome management.** Participants noted that the proper role of the board is to hold the organization accountable for achieving results. They expressed concern, however, that failure to achieve results might bring heavy-handed action from their board. For staff to feel comfortable with reporting and using outcome data, the role of the board in the accountability process should be clearly defined. Staff should feel supported in using data without fear of interference in their day-to-day operations.

**Use of outcome data to recognize successful programs and their staff—and not to threaten staff.** Outcome data are more likely to be used by staff if it is viewed as a way to “tell their story” and receive recognition for accomplishments. Staff members generally have only partial control over outcomes. Thus, outcome information is intended to be used to help identify needs and raise

questions. Organizations that focus on identifying who is to blame will likely discourage use of the outcome information.

**Flexibility and responsiveness of the outcome management program.** Symposium participants noted that data are more likely to get used if the agency is responsive to needed changes in the data to be collected and how data are shared within the organization.

**Influence of funders, accrediting agencies, and national professional associations.** Funder support for, or requirements to, undertake outcome measurement contribute substantially to efforts by nonprofits. However, if an organization is required by an external source to report on outcomes, this is not a guarantee that the organization will use the information to improve its programs. Currently, funders appear to focus primarily on achieving accountability, contributing to the lack of emphasis on using outcome information to improve services.

Funders can, however, encourage their grantees to use the outcome information to improve their programs. They could be asked to identify how they expect to use, or have used, the outcome information in proposals or renewal applications. For example, if a program's outcomes fall short of targeted goals, a funder might ask the nonprofit to address how the program will be improved.

Funders can also support the use of information by funding staff training in outcome management and by approving funds for outcome management in grants.

**Use to support “Lessons Learned” forums within the organization (or across organizations providing common services).** Symposium participants felt this would significantly increase the use of the information by staff on a continuing basis, as well as for use at the forums.

## FUNDING FACTORS

**Availability of funding for outcome measurement.** Funders seldom explicitly provide funding for ongoing outcome measurement, either as part of grants or as a grant for building capacity within an organization. In the absence of funding to support outcome measurement, an organization will have difficulty properly administering training, developing indicators, and establishing a useful data collection system. To the extent caseworkers have to spend more time collecting data, less time will be available for direct service delivery.

**Availability of “technical” support from a national service organization or other supporting organization such as the United Way.** National service organizations (NSOs) such as Girls Incorporated and Big Brothers Big Sisters of America provide basic data collection forms and templates for reports to their affiliated chapters. This support helps chapters limit their expense, as well as reduce the amount of time needed to develop and support the outcome data collection system. This increases their opportunity to spend time using the outcome information.

## STAFFING FACTORS

**Staff training in outcome measurement and outcome management.** Staff members with an understanding of the outcome measurement process can help make the data collection process run smoothly. They can analyze data, put it in an easily understandable form, and do breakouts by

key client characteristics to seek explanations for the results. These analyses make the outcome information more understandable and useful for both program staff and organization management. A concern expressed was that training in outcome management is often minimal.

In addition, organizations also must find time for staff to be in training and to conduct outcome management activities. Many organizations are not able to support dedicated staff for outcome measurement. As a result, staff with obligations to clients have to take on additional duties. Understanding and using outcome information does not have to be a complex task, but it does require at least some minimal level of analytic skill that varies based on the complexity of the indicators. If a nonprofit is able to develop that capacity internally by training existing staff, it will be easier to share and use data throughout the organization. In the absence of this internal capacity, resources may have to be used to hire outside consultants, or outcome management may not be implemented at all.

**How an agency manages its human resources, given limited funding, impacts how well outcome information is used in the agency. Factors affecting this include**

- Amount of staff training in outcome measurement and outcome management.
- Extent to which data collection tools and instruments are simple enough that staff, volunteers, and temporary staff can use them.
- Amount of agency staff time dedicated to working with the data.
- Ability to retain staff trained and skilled at outcome management.

**Organization staff time available to examine/analyze the data.**

Symposium participants repeatedly noted that it is both difficult for program staff to find time to examine the outcome information and to find staff who can do a good job of analyzing and interpreting it. Even if program staff are trained and skilled in outcome management, when overwhelmed with their caseloads, they will be unable to review and use outcome information. Some organizations overcome this by assigning a staff member to outcome management activities, such as analyzing data. This staff member has fewer responsibilities for delivering services, or is completely independent of the service delivery function of the organization.

**Ability to retain staff trained and skilled at outcome management.**

Often nonprofits find it difficult to attract and retain staff with scarce technical skills. Many organizations find them-

selves in a constant struggle to find the time and resources to train new staff. An organization with this turnover problem will have difficulty maintaining the skills needed to understand and use the outcome information.

**Staff understanding of data and confidence in the accuracy and appropriateness of the outcome data.** To the extent that staff feel that they understand the data and believe the data to be reasonably accurate and valid, they will be considerably more likely to use that information.

A related factor is the extent that program staff are involved in developing the indicators they are expected to review and use. The more they are involved, the more likely they are to accept the information obtained on those indicators, understand the information collected, and be better

able to interpret and use the information wisely. With no sense of ownership in the indicators, they may be resistant to putting out additional effort to further examine reports.

**Concern of program staff that the outcome indicators used are not a valid reflection of their work.** Participants identified the frequent staff concern that outcomes, particularly outcomes that occur after services for a client have ended, are affected by factors over which they have no control, or simply that no relationship exists between the indicator and the intervention the program provides. Staff members do not want to be unfairly blamed for poor outcomes. This in part reflects a misunderstanding of the basic purpose of outcome information, which is to identify the level of outcomes that have occurred and suggest the need for program modifications if necessary.

## OUTCOME MEASUREMENT PROCESS FACTORS

**Level of proficiency at collecting outcome data.** Greater proficiency leads to better quality outcome information, making it more likely that an organization can make use of outcome data. For a variety of reasons, symposium participants noted that many nonprofits have a hard time just getting started with collecting outcome data. Either staff are not skilled in data collection, or they do not have the time to work on developing a basic set of indicators and data collection instruments.

**Simplicity and ease of use of data collection tools for staff, volunteers, and temporary staff.** Few organizations can afford to waste time on data collection systems with cumbersome forms, difficult-to-use computer hardware or software, or difficult-to-interpret indicators. When more time is spent on data collection, less time will be available to use the data to evaluate and improve programs.

### The validity (both perceived and actual) of outcome information affects whether it gets used. Factors influencing this are

- Extent of concern by program staff that the outcome indicators the agency uses are not a valid reflection of their work.
- Extent of program staff participation in indicator selection.
- Extent of program staff understanding of the indicators and data sources.
- Lack of industry standards or best practices.
- Availability of a sufficient number of responses to make the data valid.

One way an organization can overcome problems related to the lack of funding, lack of time, and staff turnover is to use volunteers or temporary labor for outcome management activities. This relieves some of the burden from program staff that are the users of the data. In order to take advantage of this voluntary or temporary pool of labor, though, the outcome measurement procedures must be easy to use.

**Ability to share lessons learned from outcome data throughout the organization.** There are many potential users of outcome data within an organization, from the executive director to program staff. Data are more likely to get used if data reports, or at least summaries of recent reports, are shared throughout the organization so that all potential users are aware of what information is available.

**Quality of the presentation of the outcome information.** Symposium participants noted

throughout the discussions the importance of presenting data in an easy-to-understand format. If the outcome information is not presented in an informative report, there is a good chance it will not get used.

**Timeliness of data.** Participants emphasized that in order for data to be useful, they must receive it in a timely fashion. This implies that outcome information should be made available to staff as soon as possible after the end of a reporting period and this feedback should be provided at reasonably frequent intervals.

**Lack of industry standards and best practices.** Variations among programs, target populations, and geographic locations make it difficult to create a common set of indicators and standards that organizations can use. Thus, the baselines most organizations have to work with are internal baselines. Comparison data and industry standards would provide more context, making data more useful for nonprofit organizations. If comparable outcome information is available on other similar organizations, comparisons could be used to identify successful practices.

**Availability of outcome data on client populations.** Some programs serve populations that are difficult to locate and may not cooperate in responding. This includes programs that serve transient clients, hotlines, and prevention programs. Outcome information can usually be collected while clients are receiving services, but follow-up data can be very difficult to collect. In such situations, the outcome data available may not be sufficient.

**Confidentiality concerns.** To the extent that such concerns reduce, or prevent, the collection of outcome data on clients, this will limit the ability of a nonprofit to report some client outcomes and reduce the availability and usefulness of outcome information.

**Availability of outcome data broken out by key client characteristics such as gender, age, or race.** Such data provide more specific information about which types of clients, are, or are not, achieving desired outcomes. To the extent a program has efficient data processing capability, such information will be easy, or difficult to obtain.

## TECHNOLOGY FACTORS

**Technological capability of an agency.** Technology can help translate outcome data into easy-to-use reports with minimal effort. Older software programs can be cumbersome and difficult to use. While newer software programs make data processing and analysis less labor-intensive, they may require upgraded hardware. Some nonprofits still analyze outcome data by hand, which is time-consuming as well. If a nonprofit can upgrade technology and reduce the amount of time spent processing the data, the process becomes less burdensome. The time saved can be used to improve service delivery.

Similarly, participants felt that staff knowledge and comfort level with computers and related technology are often lacking and that more training is crucial. This lack of knowledge contributes to reluctance, and inability, of staff to collect, examine, and interpret the outcome data.





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