URBAN INSTITUTE

Starting Small and Thinking Long-Term

Q&A with Performance Measurement and Evaluation Professionals

Sarah Gillespie
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At a Glance:

Isaac Castillo

Position: Director of Data and Evaluation

Organization: DC Promise Neighborhoods Initiative (established 2008, 20 FTE staff, $6 million annual operating budget)

Favorite indicator: percentage of students that are chronically absent in partner schools

At a Glance:

Tony Fujs

Position: Director of Learning and Evaluation

Organization: Latin American Youth Center (established 1968, 200 FTE staff, $14 million annual operating budget)

Favorite indicator: number of youth employed or enrolled in college, one year out of the program

At a Glance:

Daniel Tsin

Position: Director of Evaluation

Organization: Urban Alliance (established 1996, 40 FTE staff, $6.8 million annual operating budget)

Favorite indicator: connectedness rate (percentage of program alumni "connected" to a pathway one year after participation)

Despite the importance of performance measurement and evaluation to nonprofit programming effectiveness and participant outcomes, the state of performance measurement among nonprofits varies widely, and resources to improve capacity are scarce. While learning communities are available to nonprofit executive directors, program staff, and other professionals, very few networks exist for those staff focused on performance measurement and evaluation. It's often described as an isolating position, and staff just getting started in this field are eager for support and advice.

BOX 1

Measure4Change

Measure4Change is a program of the World Bank Group and the Urban Institute to build performance measurement capacity among local nonprofits in the Washington, DC, metropolitan area. Nonprofits recognize the importance of measuring program effectiveness, but their abilities vary, and resources for improvement are scarce. Measure4Change aims to fill this long-standing gap between what nonprofits in the DC metropolitan area want and what they are able to do. The effort intends to deliver performance measurement training in a way that is practical and accessible for nonprofits and over an extended period of time to help it take hold. The ultimate goal of this effort is to help the DC region's nonprofits better understand how they are helping their constituencies and how they can do better. Measure4Change, sponsored by the World Bank Group, has three components: grant support and one-on-one technical assistance for grantees, a regional community of practice, and knowledge briefs.

We spoke with Isaac Castillo, Tony Fujs, and Daniel Tsin, who have been navigating their positions and organizations within the Washington DC, area for several years, to share lessons learned and tips for getting started and growing. From establishing their positions, to getting buy-in from leadership and frontline staff, to showing program impact, these performance measurement professionals were clear that organizations have to start small and think long-term. Through their challenges and triumphs, one thing is clear: for them, it's all about making programs work better—for staff, for funders, and, most important, for the communities they serve.

Describe the staff positions in your organization focused on performance measurement.

Isaac: When we started it was just me, director of data and evaluation. After the first six or seven months, as there were other things I needed to do internally and externally, I needed someone to focus on day-to-day data collection and system administration, so we created a mid-level position. Many organizations seem to start with a mid-level person and, as they grow, they are promoted to a more senior position and re-hire for the mid-level position.

Tony: Our team currently includes three full-time evaluation positions: senior, mid-level, and junior. It may seem like a luxury for a nonprofit, but we are a multiple-program organization and have slowly established the team. It has grown, decreased, and grown again over the years.

Daniel: I've been here two years as the first full-time evaluation staff. It started off as a development need—funders were asking for data. My boss, the COO, started doing it, and then we hired a grad student part time and that role grew into my position as a full-time hire. Now I'm making the case for someone else to help with routine data collection so I can think about big-picture evaluation initiatives.

Takeaway: Start with one full-time or part-time position, but seek to expand at different levels so senior staff can focus on expanding capacity while junior staff manage routine data collection.

How do performance measurement staff fit into the organizational structure?

Isaac: I report to a senior program director. It's an intentional relationship that the senior program person is tied to the senior data person.

Tony: I report to the COO. I am also part of the senior team, so I have direct access to the whole senior management.

Daniel: I report to the COO, who reports to the CEO.

Takeaway: Performance measurement staff should be connected to leadership and program staff; positions located in other operational teams, like IT or development, may undermine progress.

How are performance measurement positions funded in your organization? How hard is it to find funding to support the positions?

Isaac: New organizations have to start slowly and piece together several grants to cover a part of someone's time. Ideally, organizations can get capacity building money to support the position for one or more years, or take a piece of a large grant that can be devoted to internal evaluation activities. Eventually it should become like an accounting or development position—it's part of overhead.

Tony: Fundraising for these positions is really hard. We're funded by a mix of administrative and special-evaluation budget lines that we include directly in grant proposals. Small grants may include 3 percent for us; other grants may have a focus on quality improvement and include a larger percentage.

Daniel: We have a large grant with a focus on evaluation that funds most of my salary. We have to fundraise for the cost of some of our evaluation activities, like our random-control trial, which is a very hard thing to raise funds for.

Takeaway: Flexible funds are ideal to cover a salary at first; then, seek to include performance measurement staff as a budget line item in every grant.

What qualifications does your organization look for in performance measurement staff? Did your nonprofit have difficulties recruiting for the position?

Isaac: The ideal is to find someone with previous evaluation experience who understands quality data and how to go about answering research questions. The next-best background is someone with program experience but who has the mind-set to understand data. Performance management is a fairly simple concept, it's about being able to maintain integrity to the process and be detail-oriented. You need someone who can be a "data person" and a person that frontline staff will respond to.

Tony: I look for strong evaluation skills, including an understanding of logic models and indicators. We don't typically do complex quantitative analyses, but we need people who understand data. A lot of what we do is setting up and managing our internal database. We especially need people who can communicate, train, and work well with frontline program staff.

Daniel: First and foremost I look for someone who thinks and cares a lot about programs. It's a program role; even though you don't work directly with clients, you're always thinking about how to make things work better for clients. This person also needs to understand program staff roles and add something to programs that program staff can't do on their own. In addition to the ability to do quick data analysis—understanding basic trends and summaries—you have to be able to communicate what you're finding.

Takeaway: Performance measurement staff should be program-focused with a strong aptitude for data.

Do you ever feel "lonely" in your work? What professional development or networking opportunities have you found for support?

Isaac: I spent time connecting with peers and mentors across the nation, mainly by going to conferences. Eventually I got to know my peers in other organizations locally. I remember when we had our first statistically significant finding for one of our programs, and no one in my organization quite understood how momentous it was, but my peers in other evaluation positions got it.

Tony: We are lucky—we are alone as a three-person team—but yes, it can be an isolating position within the organization. We're also lucky we've had the evaluation department for a long time, so it's well integrated with full-time staff. I encourage my staff to attend conferences and use online courses for skills development—there are free courses in impact evaluation and statistical/data analysis. We are also members of local and national associations like the American Evaluation Association and Washington Evaluators.

Daniel: I don't feel lonely. But being a team of one is hard because I don't have anyone to bounce ideas off. Program staff is good at thinking about how to fix things, but thinking about what's a good tool to measure something, there's no one to think about that with. I appreciate the autonomy though. I've found thought partners I can turn to, but in reality I just do it and see if it works.

Takeaway: Develop a network of peers you can struggle and celebrate with; attend conferences and seek out mentors.

What are some of the most important lessons about performance measurement and evaluation for others in your organization to understand?

Isaac: I think the main thing to remember is that the number-one goal is to improve programs, so that the next participant who comes through the door is going to be served better. We have to shut our brains off to what the funder needs and wants at first, and design a plan based on what we need to know in order to be able to deliver our programs better.

Tony: We want to be a partner with program staff; we meet at every stage of program implementation. We build the logic model together, so that brings us naturally to how we're going to measure the program. We don't judge the performance of programs, so staff can see us as a resource they rely on to get the information they need to run their programs more effectively.

Daniel: It's important to distinguish between impact and outcomes. For example, one year we were able to say 100 percent of our students completed high school. But we weren't talking about how much time those kids spent in our program because we weren't tracking it. We knew our kids were graduating but we didn't know why, or what our specific impact was. So we've grown in thinking about an impact logic model and having a mechanism to collect and report impact data.

Takeaway: Performance measurement staff are in it to make programs better—work closely with program staff to identify how to support, add value to, and communicate what they're accomplishing.

How do you help establish a culture of performance measurement in your organization? How have you made the case for strengthening your organization's capacity for performance measurement?

Isaac: I think it starts with leadership. I remember the first meeting when our CEO was completely comfortable using performance measurement language and discussing why data was important to our

organization. I knew if she got it, a lot of others in the organization were probably getting it too. The more people that use the language, the better the organization is making the culture change.

You have to consider how quickly you push for high-quality data—or how slowly you go to make sure you get buy-in to the process, especially from frontline staff. It's okay to have a longer timeline for the work so the first year is a learning process and each year data quality will improve.

Tony: Ideally we'd like staff to want the data for their programs—to understand what's really working and where they need to make adjustments. But that strategy won't always work the best; sometimes the angle is the funding perspective. Every staff has reporting requirements for their funders, and sometimes it takes them a lot of time to pull that information together. A good first step to getting buy-in is to make that process easier for staff. We'll use the data system to create a lot of reports for funders, which we don't necessarily use internally to improve programs, but since we're required to have that info for funders, we can reduce the time staff have to spend on it to get their buy-in for the larger goal. My approach is to minimize the cost—data collection, data entry—and maximize the benefit to staff—real-time, easy-to-interpret information.

Commitment of leadership is also key; performance measurement has to be integrated and expected. Data collection and entry are included in all of our position descriptions.

Daniel: In my ideal world, senior staff would be requesting performance measurement data; they would need it to run their senior meetings. But that doesn't happen right away; it starts with needing the data for funders. You have to be a constant advocate for performance measurement. I don't hang on to data or analyses; I share it as soon as I have it and I have to think about how to sell it, especially if it's not great news. My goal is to provide data much more quickly, like reports on a weekly or monthly basis, so that people expect it and can use it. My vision for success is if there is a program meeting happening, they're pulling out the dashboard to look at the data, even if I'm not there.

Takeaway: Start by figuring out how performance measurement is going to directly benefit staff and how to make it as easy as possible for them. Help leadership understand and talk about data as an integral part of the organization, then seek to make data as available and accessible as possible.

What guidance do you have for smaller nonprofits or those just getting started or interested in performance measurement and evaluation? Is there a good starting point?

Isaac: Start small. Choose one program or one initiative that you do well, and then go from there. Collect just a few things and collect them well and with accuracy, rather than collecting a million things. If you try to do too much too fast, you as a performance measurement professional won't have the infrastructure to do it all well, and other staff will feel frustrated. Starting small makes it easier to train

staff, put the process in place, and grow over time. Start with getting a lot of the details squared away and getting everyone trained in those details. How do we collect data, where does it live, who's going to enter it, who's responsible for quality control, and who's going to generate reports. The infrastructure you create now is what you're going to use going forward for a while, so it's important to get it right.

This is a multiyear journey; it takes a very long time. Recognize that and know that you'll have to go through this journey with some bumps along the way, and it will get better.

Tony: My advice is always to start small. The typical mistake that I've seen many times is to start by trying to collect everything about everything. And then you have information about nothing—because you can't process the data, or the cost of collecting the data was underestimated, or you don't have good-quality data so you can't say anything. Start with having a clear picture of your intervention before measuring. What problem are you trying to solve, how are you going to solve it—tighten up your logic model. This makes it much easier to know what you need to collect and what information you'll be able to use to make improvements to your program.

Having an evaluation person is the first step before buying a data management system. The system is sometimes seen as a silver bullet that will solve everything. But having the person first who had the knowledge of what needs to be done and can choose the system is the first step.

Daniel: Evaluate one thing really well, and that will make the case to do more. The first question you have to ask yourself is what you're trying to accomplish. You'll probably have lots of different answers, so a really sound logic model is critical. Once you have that mapped out, you figure out what data you can collect to show what you're accomplishing. Pick one thing you can collect really, really well and do that first. We have five program areas, and we can't evaluate all of them really, really well. I can only start thinking about the more difficult ones now, after two years, because I've got one or two program elements down really, really well.

Do the low-hanging fruit first and do it well to build your case. In short, know what you're trying to accomplish and then find the small things that you can collect really well to prove it.

Takeaway: Understand your organization's definition of success, and set up a detailed data-collection plan to show how you're accomplishing one small piece of that success (and start with an easy piece!).

About the Author

Sarah Gillespie is a research associate in the Metropolitan Housing and Communities Policy Center at the Urban Institute, where her research focuses on place-based initiatives and community development as well as technical assistance for performance measurement and evaluation. She manages technical assistance efforts to support implementation grantees of the US Department of Education's Promise Neighborhoods initiative and the national evaluation of the Administration for Children Youth and Families Partnership to Demonstrate the Effectiveness of

Supportive Housing for Families in the Child Welfare System. She is also involved in other research in Washington, DC, and communities throughout the country.

Before joining Urban, Gillespie worked as a program manager at the US Department of Housing and Urban Development, where she focused on public-private partnerships and innovative investment models. She holds a BA from Vanderbilt University and an MPA from American University.

Acknowledgments

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