

WELCOME!

Tell us about yourself:

- Name
- Organization type
(government, nonprofit,
philanthropy, or
education)
- City, State

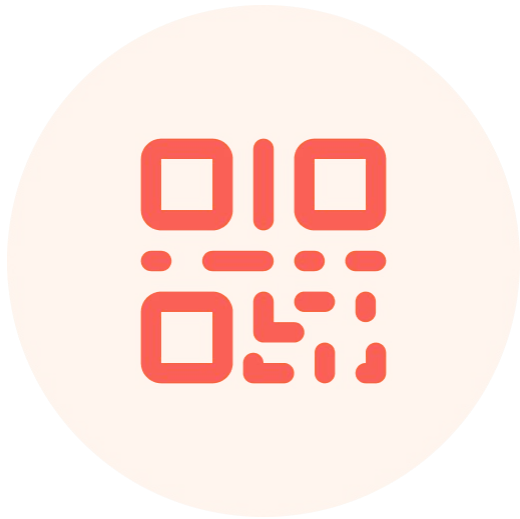


TRANSFORM
— CONSULTING GROUP —

AGENDA

1. Why evaluation is important?
2. 4-Step Process Overview
3. What can you do now?

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**Join at slido.com
#1037552**

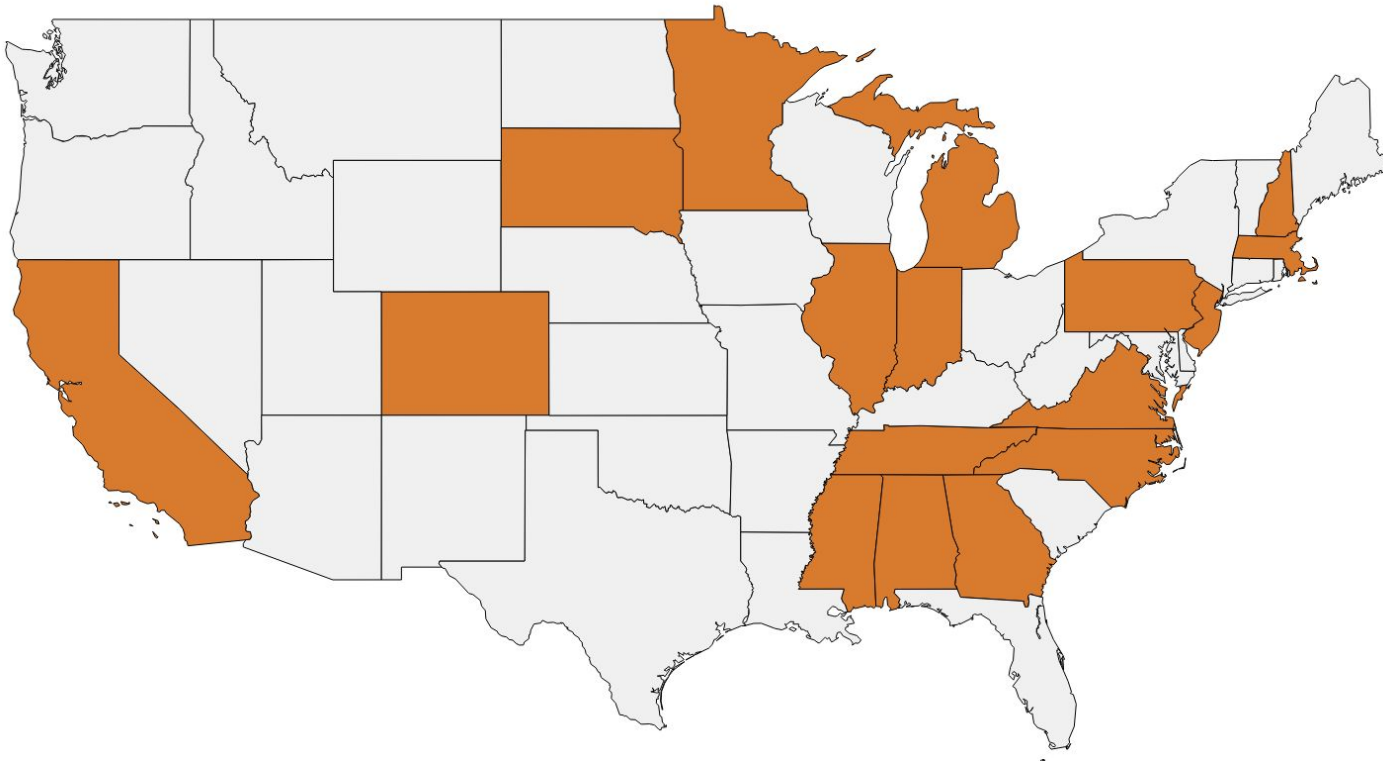
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Who We Are

Transform Consulting Group (TCG) is a woman-owned, strategic, and data-driven consulting firm.

Who We Help



GOVERNMENT

Our team has experience working inside and outside of the government – at both the state & federal level.

NONPROFIT

Whether it's fundraising, grant writing, or organizing data - we can help you get on track with our systematic approach.

EDUCATION

Our experience in working with all sectors – from early education to adult education – provides a comprehensive foundation to realize positive student outcomes and community impact.

PHILANTHROPY

We support philanthropic partners who are conveners in their communities.

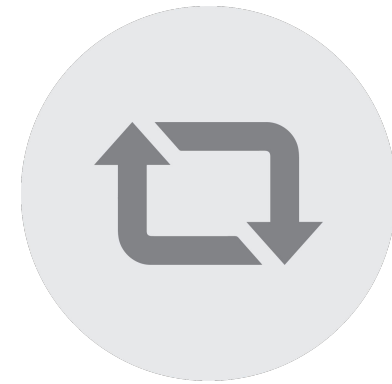
Our Solutions



Use
Data



Build
Capacity



Mobilize
Partners

Our Team



Amanda Lopez President

As TCG President, Amanda provides strategic direction for the company and leadership on all client projects. She leads a team dedicated to helping organizations make sense of data through the development of tools and systems. Amanda works with organizations and their leaders to develop competencies and skills to make them more effective and sustainable. This often results in creating strategic plans, fund development plans, and board governance tools. She is passionate about bringing together diverse partners to address the problems that are bigger than any one organization can solve alone (following a collective impact framework).



Why Evaluation is Important?

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Why is Evaluation Important?

① Start presenting to display the poll results on this slide.



Importance of Evaluation

- ❑ Funders and other nonprofit partners are becoming more interested in accountability.
- ❑ There is less focus on just reporting number of people served (**outputs**).
- ❑ It is now necessary to show impact and how programs move the needle (**outcomes**).



Evaluation Purpose



Mandatory

- Compliance
- Grant requirements
- Tied to funding

Be the Best

- Demonstrate **impact**
- Inform **decision-making**
- Track **progress** and **impact**
- Grow **learning** and continuous improvement
- **Market** your program
- Acquire **funding**

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What keeps us from doing evaluation work?

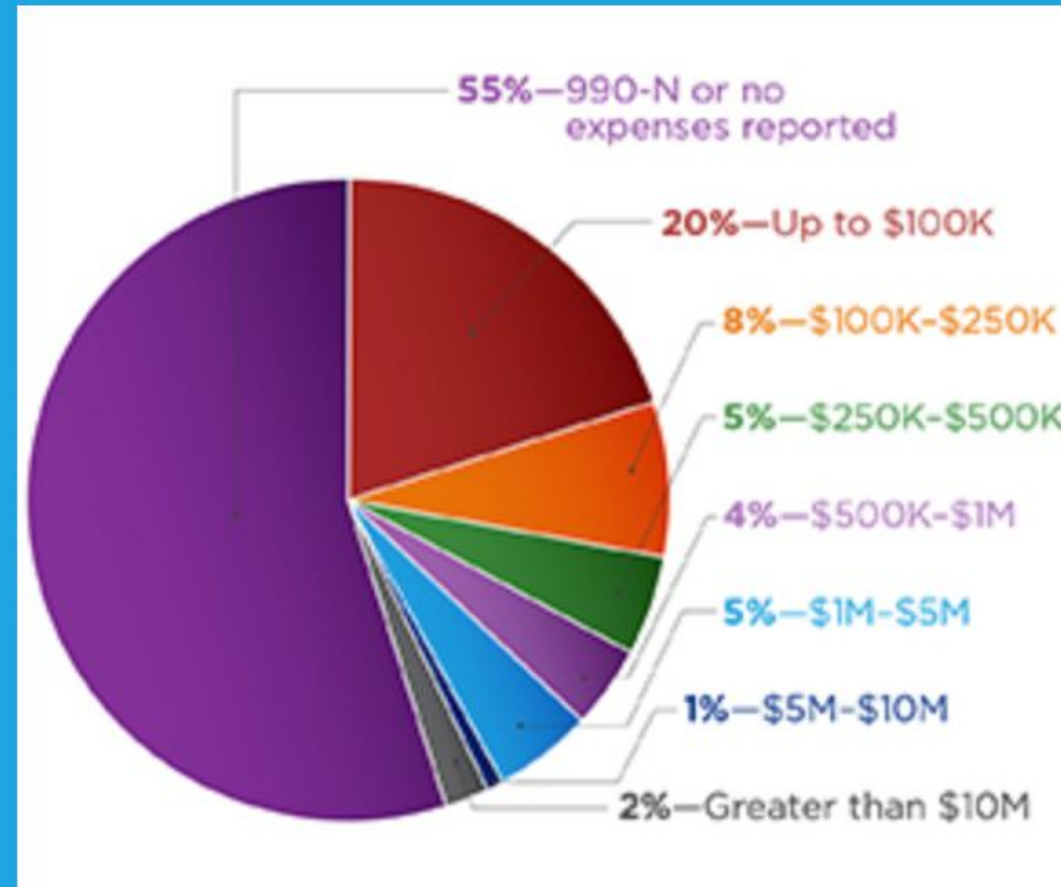
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Fear and Capacity

Nonprofit Capacity

- Staff
- \$\$
- Technology
- Resources

Most Nonprofits are Small, with Budgets Under \$1 Million





Process Overview

Our 4-Step Process





Step 1: Clear Outcomes

If you don't know where you
are going, how are you
gonna' know when you get
there?"

Yogi Berra

Step 1

What Questions Do We / Others Want to Answer?

- ✓ About our **participants**
- ✓ About our **programs**
- ✓ About our **staff**
- ✓ About our **community**
- ✓ About our **partners**



Outputs and Outcomes



Outputs

- What we do; who we reach
- Usually seen, touched, handled, or moved
- Number of people seen, number of calls received, duration of activity
- Example: We served 100 children in a summer camp.

Outcomes

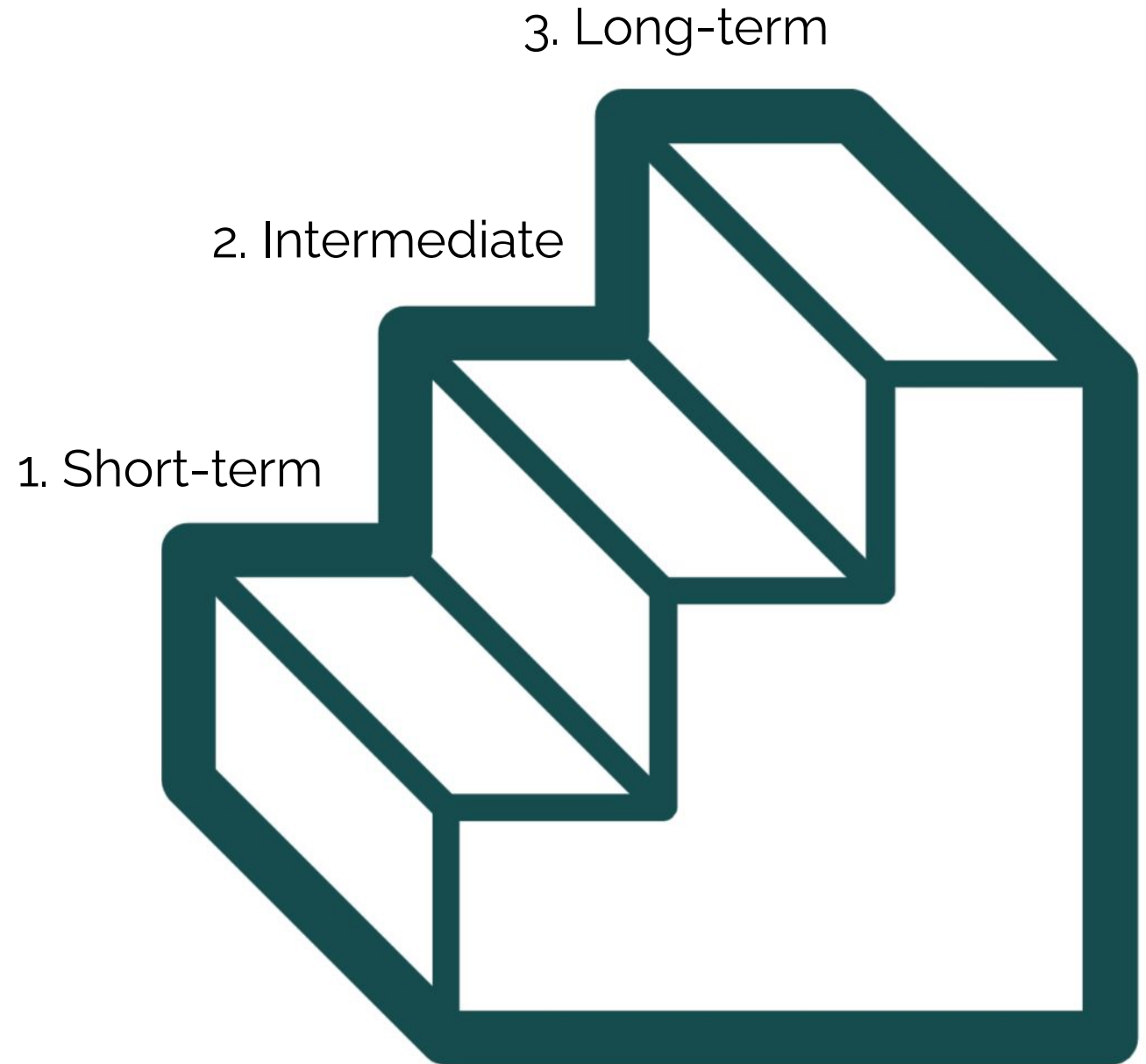
- Change in behavior, attitude, knowledge or skills
- Expected result(s) of service(s) for targeted population
- Level of performance or achievement
- Example: We increased summer reading gains by 2.5 months in 6 weeks.

What are Components of Outcome Development?



- **What** will change?
 - Behavior, attitude, skill, understanding.
- **Who** specifically will be affected?
 - Targeted audience of service(s).
- **How much** change will occur?
 - Increase/decrease by x%
- By **when**?
 - Annual, bi-annual, quarterly, end of program

3 Levels of Outcomes



Be “SMART”



- **Specific** - explicitly state what you want to happen, where and to whom as a result of your intervention.
- **Measurable** - Identify the current, or baseline, value and the level or amount of change that is expected.
- **Achievable** - Realistic targets that can be met over time, reflecting incremental change.
- **Relevant** - Ensure that what you hope to achieve in the short-term will get you where you want in the long-term.
- **Timely** - Identify the end point of your intervention and the points along the way at which you will measure progress.



Things to Consider

- ✓ Evaluate the important outcomes only.
- ✓ Only include what you will use and need.
- ✓ Annually update and review.
- ✓ Engage diverse staff and stakeholders for feedback

Case Study

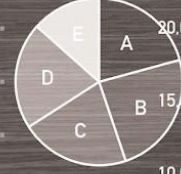
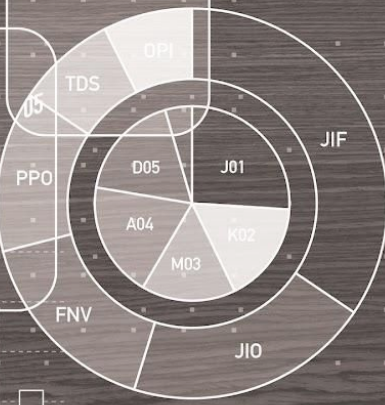
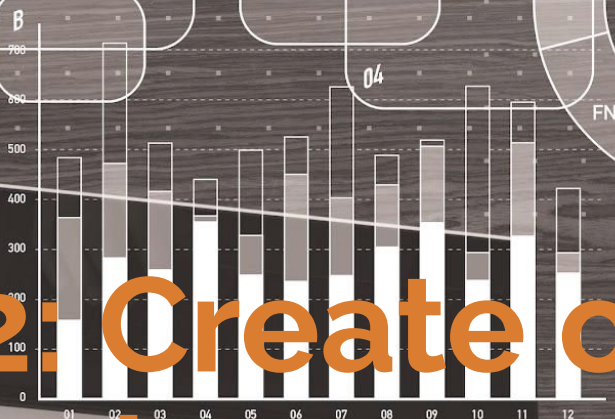
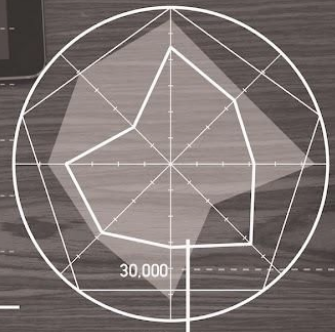
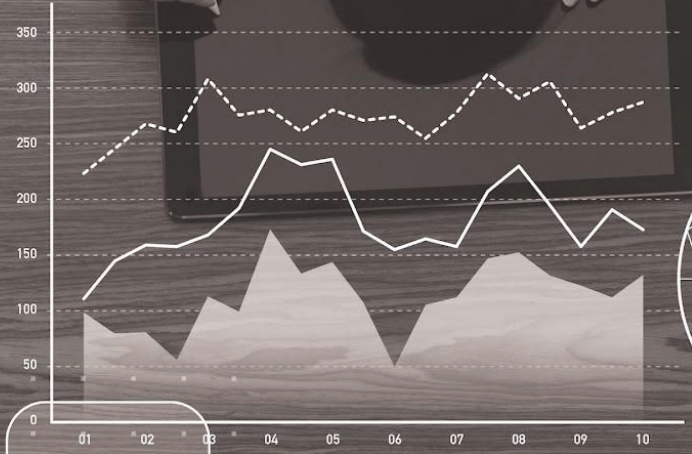
Geminus Strategic Plan

Geminus Head Start **Strategic Plan**





AIU	1,822	2,349,000
EJK	3,680	2,348,000
HPL	1,062	5,478,000
KEE	485	8,369,000
NAH	8,569	199,301,000
QOP	6,602	102,698,000
TIK	890	24,697,000
WIG	6,280	76,002,000
AHD	2,436	57,610,000



Step 2: Create or modify data tools and systems

AIU	HJI	WWE	PLO	EER	QRT	OPY
1,822	20,369	890	6,350	10,785	665	6,800
(35)		(-2)	(-2)	(+0)	(5)	(-115)
MBC	L	M	F	N	UG	OM
3,605	9,542	2,609	7,654	6,522	1,63	3,652
(+210)	(-128)	(+35)	(+169)	(+122)	(-)	(+182)
YBV	QMN	MMJ	IIT	KLM	CCX	EMH
3,204	5,211	7,100	7,150	782	1,901	3,280
(-33)	(+156)	(-60)	(-150)	(+74)	(+101)	(-120)
MRR	WFF	HJM	QLC	LSD	SDH	GHS
3,320	712	134	2,022	631	6,287	12,630
(+120)	(+12)	(+5)	(-18)	(+40)	(-57)	(+330)

Step 2

- Data Audit
- SOPs
- Training Staff



What are Data Collection Tools?



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- Intake Forms
- Lesson Plans
- Interviews and Focus Groups
- Observations (of instructors and/or participants)
- Surveys (participants, parents, teachers)
- Assessments
- Database
- Report Summaries (Grades and Tests)
- Descriptor Catalogue
- Demographics (Census)



What is Purpose of Data Tools?

- Gather data to answer the research questions.
- Collect data to report on the agreed upon outcomes and outputs.
- Have procedures in place to consistently collect valid and reliable data.
- Identify schedule and timeline for collecting, analyzing and reporting the data.
- Review the data collected for quality assurances.

DATA COLLECTION PLAN

Program Name:					
Outcome/Output	Data Collection		Data Analysis		
	Responsibility Identify who is responsible for collecting and analyzing the data.	Timing Identify when the data will be collected.	Source Identify the data tool and specific item within the data tool. That will answer the outcome.	Sample Identify the # of individuals that completed the data tool and included in this sample.	Method Explain how the data will be analyzed.

Data Collection Plan

Data Tool	Data Collection				Logic Model Alignment	Data Analysis				
	Target Group	Timeline	Responsibility	Procedures		Why?	Research Questions	Measures	Timeline	Responsibility
Program Registration Form	All Students	At the beginning of any program			To collect all basic registration info and number of students served.	Output Data	1. How many student participants? 2. What is the demographic breakdown on students (gender, grade, school type, etc.)?	Ethnicity Parent Education Level Free/reduced lunch Family structure	BOY, MOY, EOY, SUM	
College Readiness Assessment	7th - 12th Grade Students	CRA will be given at the beginning of October. Students will have 2 weeks to complete it, allowing time for staff to send reminders, if needed.			Still close to beginning of school year for intervention and reteach for struggling students.	Short Term Outcome Measures	1. What are students' post-secondary aspirations? 2. Are students on track for college / career? 3. Do students have knowledge of post-secondary?	Study time Postsecondary aspirations Understanding of course work necessary for college Understanding of post-secondary application process Knowing where to seek help for academic issues	Data will be ready for analysis by end of October. **Risk Factor Reports can be run from CRA data anytime of year.	
Connect	Post-Secondary Enrolled Students	Once per year, the first week after Labor Day. Students will have 2 weeks to complete Connect, allowing time for staff to send reminders, if needed.			To catch students before potential withdrawal before fall break, or first round of testing, so there is time to intervene.	Short Term Outcome Measures	1. Are students on track for persisting and completing post-secondary? 2. Who is at risk for not persisting and completing?	Knowing where to seek help for academic issues College persistence College completion	Data will be ready for analysis by end of September. **Risk Factor Reporting Tool can be run from CRA data anytime of year.	
National Student Clearinghouse	All High School Graduates	Roster uploaded mid-October along with cohort of students that graduated high school in Spring.			To identify students who enrolled in college and if they are persisting.	Long Term Outcome Measures	1. How many students enrolled in postsecondary education? 2. How many students are persisting? 3. How many students are completing?	College enrollment College persistence College completion	MSC results are available by the beginning of November.	
Rooney Foundation (public schools data sharing agreements)	All Students	Data is available 3 times per school year: BOY (Aug), MOY (Jan), EOY (May).			To determine who is on track and/or who is at risk for not staying on track.	Intermediary Outcome Measures	1. Are students on track for high school, college and career? 2. What key milestones do students need to complete to be ready? 3. Who is at risk of not staying on track?	GPA Test scores Attendance rate Graduation rate Suspension/expulsion rate	Data can most likely be analyzed during BOY (Sept), MOY (Feb), EOY (June)	
Pre-Surveys	All Program Participants	Students will get a survey link during program orientation, or starting 2 weeks before the first program session, which will close after the first session/class. Any student who did not receive the survey link will have 10 minutes to complete a paper survey at the beginning of 1st session.			To determine how much knowledge students have prior to participating in a program.	Short Term Outcome Measures	1. Do students have prior knowledge of the skills learned in this program?	Knowledge of skills	A week after the first program session begins.	
Post-Surveys	All Program Participants	At the end of a program: Students will get a survey link, or have the option to complete a paper survey, during final program session. Survey link will close 1 week later.			To determine how much knowledge was gained as a result of program participation.	Short Term Outcome Measures	1. Did students acquire the knowledge and/or skills presented in this program?	Attainment of skills	Two weeks after the final program session.	

BOY = Beginning of the Year (July - September)

MOY = Middle of the Year (December - January)

EOY = End of the Year (May - June)

SUM = Summer (June - July)

Data Collection Schedule

CLD Data Management Plan Schedule

Revised 2.2016

Data Tool	CLD Program	MONTH													
		January	February	March	April	May	June	July	August	September	October	November	December		
Impact Team Meetings	All programs.	Beginning of month					Beginning of month								
Program Registration Form	All Programs.														
CRA	All participants enrolled in a CLD program.										Beginning of month. Students have 2 weeks to complete. Data available to analyze end of month.				
Connex	All participants enrolled in a post-secondary program.									After Labor Day weekend, students have 2 weeks to complete. Data available to analyze end of month.					
NSC	All participants enrolled in a post-secondary program.										Roster uploaded mid-month	Data will be available to analyze early to mid November.			
Rooney Public School Data	Bartholomew Consolidated School Corporation	Middle of school year					End of school year				Beginning of school year				
	Indianapolis Public Schools Lawrence Township Pike Township Warren Township Washington Township Wayne Township AA Male Initiative Business Orientation Project College Prep Parent College Prep Student CPI Workshop														
Program Survey	Emerging Scholars	PRE Dec 27 - Jan 9		POST 19 - 26			13th	10th	8th		9th		18th	9th	
	CPC Student Participant				20th	17th	16th	20th	18th	22nd	20th	21st	19th	9th	
	CPC Parent Participant										27th	27th			
	Imani Book Club							PRE 2 - 16	POST 19 - 27				10th		
	Jr. Self Discovery/Career Exploration									PRE 13 - 30			POST 17 - 23		
	Parent Chat			7th	12th	12th							8th	13th	10th
	Precious Miss			PRE 2 - 19				POST 3 - 13					PRE 6 - 27		POST 19 - 29
	Project Mixter			PRE 16 - Apr 2				POST 7 - 13					PRE 13 - Sept 1		POST 5 - 11
	Rawls Scholars		PRE Jan 27 - 10												
	Role Model Advisor Experience														
	SAT Prep									PRE 15 - July 9			POST 13 - 19		
	Self Discovery/Career Exploration	PRE 13 - 25				POST 18 - 29							PRE 14 - Sept 12		
	Success Prep Parent							PRE 10 - Jun 4	POST 25 - July 1						
	Success Prep Student							PRE 10 - Jun 4	POST 25 - July 1						

Timeline for administering "PRE" survey is from 1st day of program orientation or 2 weeks before the first program session, until right after the first program session. Usually around 2-3 weeks.

Timeline for administering "POST" survey is from final program session to 1 week after.



Standard Operating Procedures

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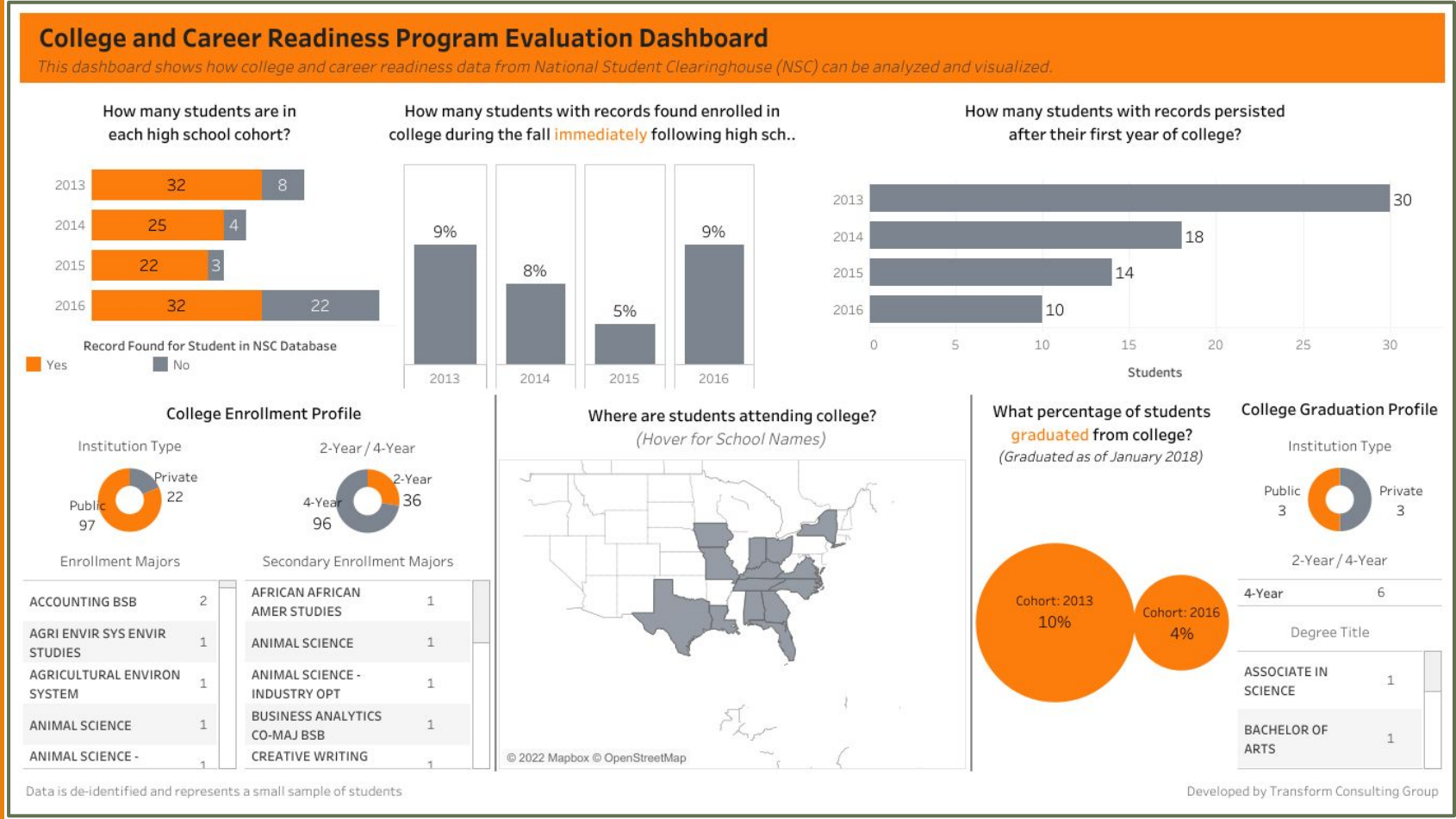
- ✓ Purpose
- ✓ Responsibility (role/ job position)
- ✓ Instructions
- ✓ Timeline
- ✓ Materials/ Attachments
- ✓ References
- ✓ Date completed/ updated

Things to Consider

- ✓ Assess your internal capacity to collect data
 - Knowledge (skills)
 - Systems
 - Time
- ✓ Consider your target audience's capacity
 - Readability/ literacy level
 - Technology
- ✓ Consider timing
 - Ensure appropriate timing of data collection with other organization needs

Case Study

National Student Clearinghouse data



View an example here!

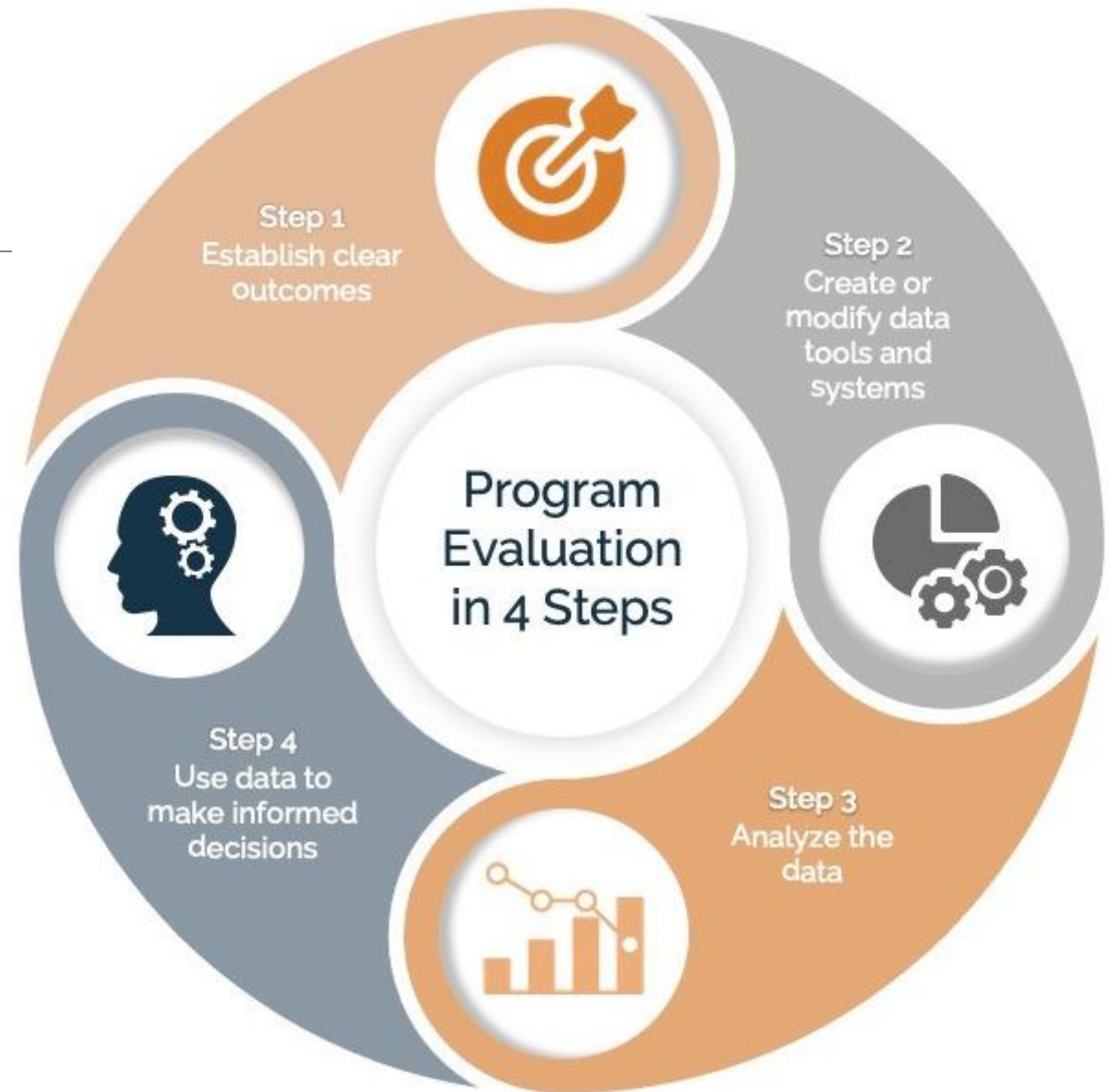




Step 3: Analyze the data

Step 3

- Did we accomplish our goals?
- Analyze your data to determine results and impact



Without reflection, we go
blindly on our way, creating
more unintended
consequences, and failing
to achieve anything useful.
~ Margaret J. Wheatley

How to Analyze Data

- Identify the survey tool that collected the data
- Review the data collected
- Clean and format the data appropriately
- Confirm the sample size (or “n”)
 - Is it a reliable sample size?
- Confirm timeline of data collection
 - Within the set timeline, so it is reliable

How to Analyze Data?

Quantitative Data

- Excel
- Survey Monkey
- Google Forms
- Statistical Analysis
- Database
- Data Visualization
- Statistical Analysis (SPSS)

Qualitative Data

- Word Cloud
- Themes
- Trends

Data Analysis Example

Outcome	Target Goal	Actual Result Indianapolis (N = 201)	Actual Result Muncie (N = 55)
Participants have an aspirational goal to pursue college, a career or the military after high school.	95%	85%	85%
Participants can identify personal strengths that relate to career interests.	95%	72%	68%
Participants can identify at least one career path they are interested in pursuing.	95%	89%	79%
Participants have a positive attitude towards obtaining a career.	80%	82% ✓	85% ✓
Participants understand what it means to have a good work ethic.	80%	88% ✓	94% ✓
Participants understand the importance of organizing and prioritizing tasks (at work and home) to help achieve goals.	95%	84%	91%
Participants understand the importance of personal budgeting.	95%	77%	77%

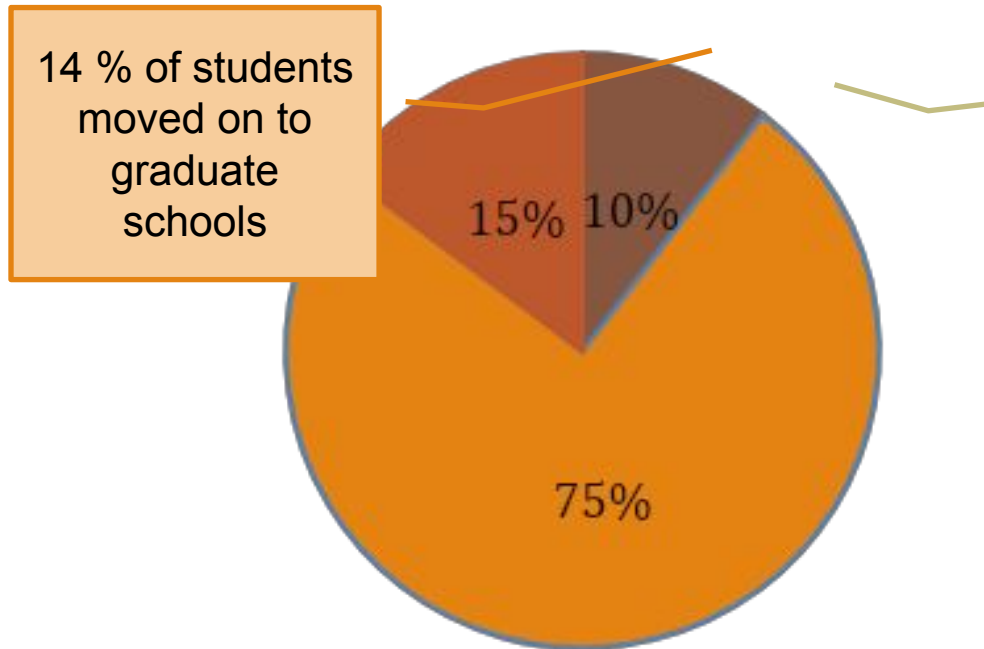
Sample Size: N = 256 respondents

Data Analysis Example

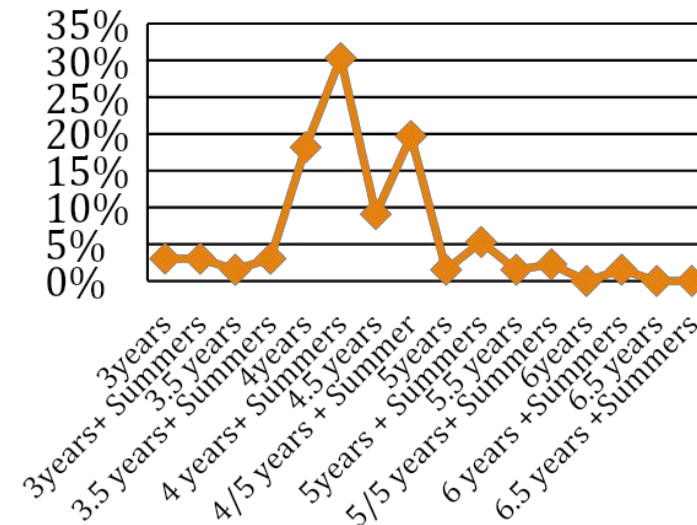
College Graduation rate



■ graduated ■ still in school ■ withdraw from school



Average lengths for completion are 4 years (8 semesters +several Summer semesters)

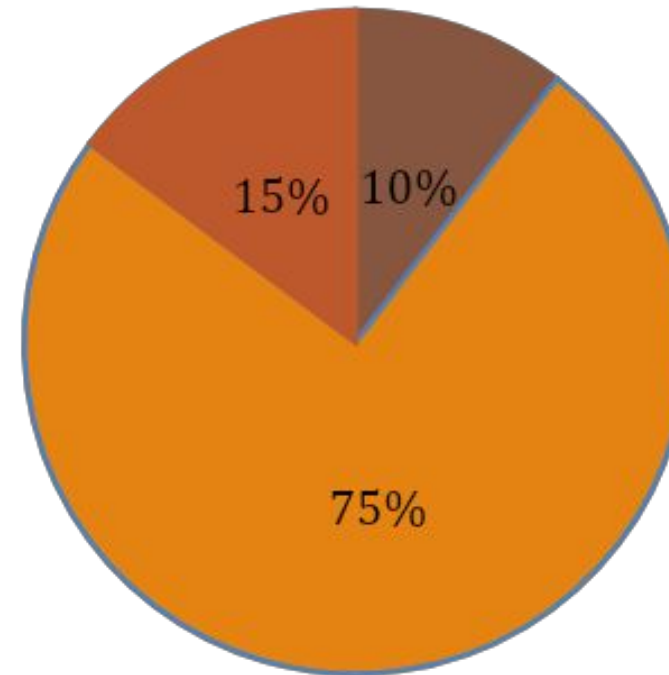


Data Analysis Example

Red Flags!

■ graduated ■ still in school ■ withdraw from school

- These students do not have any enrollment record after 2011
- Median lengths that they stay school before withdrawing are 2 semesters
- 51% of them withdraw from Ivy Tech





Analyze Data

Program's Summary of Impact

- 99% of College Bound's students have graduated from high school.
- 94% of College Bound students have matriculated to college immediately after high school.
- 88% of College Bound students have re-enrolled for their sophomore year, and 82% have re-enrolled for their junior year.
- In 2014, CB collegians graduated above the rate of students with family incomes of \$100,000+

Analyze Data w/ Context



- 99% of College Bound's students have graduated from high school **compared to** only 68% of St. Louis Public School students and 53% of low-income students living in cities.
- 94% of College Bound students have matriculated to college immediately after high school, **compared to** 66% of St. Louis Public School graduates and only 51% of low-income graduates nationwide.
- 88% of College Bound students have re-enrolled for their sophomore year, and 82% have re-enrolled for their junior year. **By comparison**, fewer than 50% of low-income students nationally re-enroll for their junior year and just 11% of low-income first generation students graduate within six years.
- In 2014, CB collegians graduated at **FIVE TIMES the rate** of their low-income, first-generation peers, and above the rate of students with family incomes of \$100,000+

Data Analysis Discussion

- What is interesting?
- What questions does this raise for us?
- What is significant about this information?
- What else do we want to know?





Things to Consider

- Staff capacity
 - Training and support to skill up staff or External support w/contractors
- Clear processes to improve data quality
- Go deeper
 - Disaggregate the data by different populations, locations, services, etc.
- Visualize your data
 - Charts, graphics, infographics, dashboards



Step 4: Use data to make informed decisions

Step 4

- Internal
- External





60%

of nonprofit professionals
say they DON'T use

data

of the largest
non-profits

Results-Driven Culture



Internally Focused

1. Continuous Quality Improvement
 - Program Improvement
 - Professional Development
 - Target Population
2. Staff Engagement w/ Impact Teams

Externally Focused

1. Marketing and Communications
2. Fundraising
3. Partnership Development
4. Outreach and Recruitment

Internally Focused

Implement a Continuous Quality Improvement Framework for driving results!



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Form an Impact Team

- ~ 5-10 people (depending on size of organization)
- Different staff levels positions (managers to direct service staff)
- Different roles in the organization (program staff, communications development),

Purpose and Structure



1. Monitor and track the CQI and Outcomes process
2. Keep team accountable to the process
3. Study the data
4. Make recommendations

Impact Team

Have guiding discussion questions to study the data:

- What is interesting?
- What questions does this raise for us?
- What is significant about this information?
- What else do we want to know?
- What tools could guide our discussion?

Externally Focused

- ✓ Marketing and Communications
- ✓ Fundraising
- ✓ Partnership Development
- ✓ Outreach and Recruitment

Externally Focused - Marketing




- How are you incorporating the following in your communications:
 - ✓ Impact
 - ✓ Results
 - ✓ Value
- Who is your audience?
 - Use your data differently based on the audience.

Marketing and Communications

Annual Report

employment



GISELDA CORTEZ
Retail Associate, Lawrence Goodwill Store
Achiever of the Year Award Recipient
Employee since 2008

Any retailer would love to have Giselda Cortez as an employee. Customers go out of their way to stand in her checkout lane. Managers know they'll have extra Goodwill Rewards applications to process when Cortez is working, because she enrolls so many customers in the loyalty program.

Cortez is also a person with a disability. It affects her speech and movement, but it doesn't slow her down or define her. She cleans the dressing rooms, hangs clothes, helps shoppers find items, takes care of customers at checkout and more.

"I try to talk with customers or help them find something good. If I need help with a customer, I ask for it. And my co-workers help me," she said. "My motivator is my paycheck — to pay my bills and the payments on my home."

The key to Cortez' success is her belief that her performance and productivity should be no less than that of her co-workers. She usually exceeds expectations, and she sets the tone for those around her.

"I say, 'Yes, I can do it.' I work hard and give all my strength, so they know I can do it," she said.

Cortez symbolizes the entire Goodwill mission, not just by overcoming her barriers, but because she actively contributes to her store's success through her leadership and outstanding customer service.

Meet Giselda and hear her story.
Visit goodwillindy.org/community.



TODD PARKER
Mail Clerk, Goodwill Commercial Services
Barbara Robinson Memorial Award Recipient
Employee since 1994

774 individuals found employment after receiving Goodwill services last year

They began their jobs at an average hourly wage of **\$8.54**

90 attained an industry credential or certificate that enhanced their employability

Goodwill Industries of Central Indiana grew to

2,780 EMPLOYEES

Employment of teachers and staff at Goodwill's schools reached **153**, bringing the organization's total number of employees to **2,933**

1,807 EMPLOYEES have one or more barriers to employment, including:

1,113 with disabilities	1,048 without a high school diploma	363 with a criminal background
-----------------------------------	---	--



Marketing

- Website

WHAT WE DO



3503

workers are employed at Goodwill of Central & Southern Indiana, and more than half face challenges such as disabilities, criminal histories or limited education.
[Meet Lorena.](#)



3171

adults have graduated from The Excel Center – Goodwill’s adult high school – since 2010.
[Meet Brenda.](#)



2437

families have been served by Goodwill’s Nurse-Family Partnership since 2011, helping kids get a great start in life.
[Meet one of our families.](#)

Fundraising



- Goal-oriented statement about their organization.
- Image matches their goal statement.
- Connected to the financial ask
 - Helps donors see the impact and difference that their gift will make.

Fundraising

- Align data management schedule with fund development schedule
- Development team should know when new results will be available.



Partnerships

- Use data to secure new partners or strengthen current partners.
- Can expand your services.
- Align your outcomes.
- Clarify roles and expectations

**PROPOSE A
PARTNERSHIP**



Outreach



Are your outreach efforts effective?

- Are your events reaching the right audience?
- Are individuals enrolling?
- Where is your greatest enrollment coming from?
- Are you serving the right population?
- Marketing materials have big impact!
- Public speaking/ message is also a big influence.

Our 4-Step Process



slido



Which of the 4 Steps in the Process do you need to work on first?

① Start presenting to display the poll results on this slide.

Next Steps

- Create a plan
 - Clarify your outcomes
 - Ensure data tool alignment
 - Develop/modify SOPs
- Evaluate your programs
- Manage data
- Visualize data
- Train your staff



What to do next?



1

Become a TCG Insider



2

Schedule a Consultation



3

View our Work

Presenter Contacts



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President, TCG

a.lopez@transformconsultinggroup.com



www.transformconsultinggroup.com