Outcomes Management for Strategic Planning

AIBS Council
December 5, 2012
About WhatWorks at TRI

The Center for What Works helps nonprofits, philanthropic organizations and their grantees to gain clarity on results and how to achieve them, moving the needle on social issues.

www.WhatWorks.org
TRI’s Guiding Principles

Our philosophy and successful approach for the last 50 years:

Targets, reflecting human gain for those served by programs, are the best starting point for strategy, tactics, alignment, and course-correction in any organization or community.

Sparkplug individuals, who lead change by example, are the basis of results.

Energy, building on focus, optimism and vitality, is the key resource leaders generate and harness.

Innovation is less a matter of something new than of something better.

Self-help, defined as people doing everything possible for themselves, builds vital, sustainable communities and organizations.

Learning is the lifeblood of outcomes. True learning is dynamic, moving beyond gathering knowledge to changing behavior. How much you have changed reflects how much you have learned.
“The success of our work is measured by a single question: 

*Are people better off now than when we started?*”

*President William J. Clinton, Foundation website, What We Do*
Common Challenges

Yes, of course…

At least we think so…
Targeted Mind-set

Today
I came.
I like it.
I got it.

A month later
I remember.
I tried something.
It worked.

Lasting effects
I keep using it.
I see the difference.
I have changed.

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Qualities of a High Impact Organization

**Accountability & Transparency**

- **High Performance**
  - Data management discipline
  - Constituent feedback
  - Outcome focused intent
  - Relate efforts to outcomes
  - Learn and adjust approach
  - Continuous improvement

- **Impact**
  - Positive, sustainable change
  - Continuous learning and improvement
  - Independent verification

**Higher Risk Investment**
- Capable Leadership
  - Strategy/Theory of Change
  - Passion
  - Experience
  - Persistence
  - Creativity
  - Ability to get others to follow

**Lower Risk Investment**

*Developed by the Alliance for Effective Social Investing and Adapted by The Center for What Works at TRI*
1. How do you define success – the results of your services?
2. How do you know for sure when success has been achieved?
3. How do you know, halfway through your program, that you have enough energy and resources (time/money) remaining to achieve the success you have defined?

1. What is the problem we are trying to address?
2. What do we do to address it? (including theory of change)
3. What are we achieving?
4. How do we know what we are achieving?
5. What are we learning, and how can we improve?

1. What is your organization aiming to accomplish?
2. What are your strategies for making this happen?
3. What are your organization’s capabilities for doing this?
4. How will your organization know if you are making progress?
5. What have and haven’t you accomplished so far?
1. Success is clearly defined.

3. Verification that success is on track to being achieved.

5. Enough resources remain to get results.
Facing Concerns of Measurement

Why should I measure a program/offering that I know intuitively is changing lives/member thinking?

Will this impact my ability to recruit and sustain members? Money?

What if I discover something doesn’t work well?

How will I find the time and money to do the analytics?

What if we don’t have the internal expertise?
Key Words in Funding Process
(Accountability)
(Compliance)
(Monitoring)
(Reports)
(Evaluation)

• Accountability
• Compliance
• Monitoring
• Reports
• Evaluation
Activities versus Results

We sent 300 eNewsletters this month

- # and % opened
  - navigated, clicked-through by target audience
  - responded to articles, acted-on research
  - Increased support for issue

150 members attended our annual meeting

- # and % of participants who achieve the desired outcome:
  - formed new relationships
  - Increased knowledge and support for issues
  - collaborated on research
  - renewed membership
1. Mail program recruitment brochure
2. Training sessions
3. Certification sessions

- Activities
  - 40 parents register
  - 30 attend at least 3 training sessions
  - 25 demonstrate new skill
  - 20 implement skill at home
  - 15 control anger for 3 months

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What is…

• More powerful than great plans
• More effective than a big committee
• More useful than even a lot of money

Human Sparkplugs
Human Sparkplug Characteristics

- **Bias To Act**
  - Focus on solutions
  - Sense of urgency
  - Opportunity driven

- **Results Orientation**
  - Need for achievement
  - Clear and compelling vision for success
  - Chart and use milestones

- **Energy**
  - Stamina and staying power
  - Enthusiasm and optimism
  - Sense of humor

- **Personal Responsibility**
  - Focus on personal accountability
  - Take responsibility before it is delegated
The Journey to Impact

Nonprofits

Provider

High Performer
Nonprofit Result Trail

Service Provider...

- Defines success and clarifies the results they seek.
- Designs an outcome framework to drive intentional efforts.
- Predicts results and manages all efforts towards verifying those results.
- Cultivates Sparkplug leaders to use data to achieve results or make timely course corrections.
- Consistently communicates success and learning to energize all stakeholders.

Continuously integrates staff and participant feedback, at all levels, to refine both strategy and operations, to improve results for clients.

...High Performer
Result Trail for Association Members

Express interest in joining the Association

Join the Association

Share desired benefits for memberships with the Association

Take action on opportunities presented by the Association

Confirm that benefits are meeting/exceeding expectations
Welcome to the WhatWorks Outcomes Portal (v 1.0)!

The Center for What Works and The Urban Institute recently completed the initial phase of a research project to provide the first sector-wide framework for nonprofit program outcomes and indicators for success. Currently, there are 14 outcomes frameworks and a draft for a Common Outcomes Taxonomy, all to assist service providers and funders to identify well-researched program outcomes and key indicators to measure, compare, and improve program impact.

WhatWorks has developed two online tools to bring this research to your organization.

Outcomes Framework Browser

Navigate through the 14 programs areas and browse their respective outcomes and indicators. Once you choose a program area of interest, or the more general

Impact Measurement Framework

The Impact Measurement Framework allows users to define their mission/program impact statement and then choose up to three outcomes most relevant to that statement. Once the key outcomes are identified, users choose the measureable indicators of success. The outcomes and indicators are based on research by The Center for What Works and the Urban

**Advocacy Program Description**
To improve the condition of the target population, specifically to help protect human, legal, and civil rights, by change efforts initiated by a policy-advocacy organization or organizations that do policy advocacy as a part of their work. Programs may also include non-human issues such as animals or environment.

**Outcome Sequence Chart**

**OUTPUT**
- Issues are identified and defined

**Intermediate Outcomes**
- Increased visibility by policy advocacy organization on issue X
- Positive publicity on issue X
- Improved alliances in the community (community engagement)
- Increased knowledge and support for issue X
- Increased favorable litigation for issue X

**End Outcomes**
- Increased legislative support for issue X
- Change in policy
- Increased regulatory process implementation for issue X
- *Increased equity in community
- *Implementation of changed policy
- *Improved condition of population X

**Indicators**
1. Number of people targeted with information on issue X.
2. Number of media outlets that publish material developed by organization.
3-4. Number of organizations a) involved in coalition b) attending meetings/assemblies.
5. Number and percent of a) participants, b) community residents, providing funds to support the cause.
6-7. Number of elected officials who publicly support the campaign and number of legislative votes in favor of the program's position on issue X.
8. Number of litigation in favor of the program's position on issue X.
9. Number and percent of sought actions taken by a government agency.
10-11. Number of favorable legislation/reform measures passed related to program goals or development and number of regulations changed in favor of issue X.
12-14. The specific indicators will depend on the purpose of the advocacy.
Why Is This Important?

*What gets measured, gets done.*

*If you don’t measure results, you can’t tell success from failure.*

*If you can’t recognize failure, you can’t correct it.*

*If you can’t see success, you can’t reward it.*

*If you can’t see success, you can’t learn from it.*

From *Reinventing Government*, By David Osborne and Ted Gaebler
Outcomes of Outcome Management

- Preparation for challenges
- Improved resource allocation
- Better programs and services
- Success at raising more funds
Questions?

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