Preventing a Technology Headache

Presented by Trina Willard, Founder and Principal of The Knowledge Advisory Group
Preventing a Technology Headache

Welcome to the ClientTrack webinar:

- We will begin shortly.
- There will be a Q&A following today’s presentation.
- This webinar is being recorded and will be available on our website.
- Thank you for joining us.
Today’s Agenda

- Welcome and introductions
- Why organizations need evaluation data
- Case studies
- Creating a framework for identifying appropriate outcomes
- Demo
- Questions/Answers
- Contact Information

#evaluationdata
Preventing a Technology Headache

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ClientTrack
Overview

- Why organizations need evaluation data
- The problem with evaluation tech efforts
- Creating more successful tech solutions
Why Organizations Need Evaluation Data
What is Evaluation?

- Program evaluation is carefully collecting and analyzing information about a program or some aspect of a program in order to make necessary decisions.
- The type of evaluation you undertake to improve your program depends on what you want to learn.
- *Continual improvement is an unending journey.*
Types of Evaluation

- Process
  - Descriptions of what you do, how much you produce, and how you do it

- Outcomes
  - Changes that occur within the client, member, or system as a result of your activities
Consider These Influences

- External pressures
  - Increased public scrutiny
  - Funder accountability
  - Economic decline

- Internal motivations
  - Continuous improvement
  - Greater mission focus
Recognize the Advantages of Data

- Data can provide powerful evidence
- Data can be objective and reduce bias
- Balanced information provides the opportunity for independent interpretation
Examples of Evaluation-Relevant Systems

- Case management or tracking
- Outcomes reporting
- Organizational dashboards
- Data/survey collection interfaces
- Web-based information platforms
The Problem with Evaluation Tech Efforts
Have you ever seen this happen?

- IT provider & customer (nonprofits/government agency) make agreements and implement new system
- Customer uses new system
- Customer experiences difficulties
- IT provider/system perceived as failure
Case Study 1

- Description: Small parenting education nonprofit
- Existing conditions: Managing data in Excel; limited staff capacity; limited training in data; cash strapped
- Data Needs: Increasing demand from funders to demonstrate outcomes; wanted a case management and outcomes database
- Solution: Found $$ for desired database and begin implementation
Case Study 1 (continued)

- What happened?
  - Leadership changed two weeks before system implementation.
  - Board relatively disengaged
  - No buy-in from new leadership
  - Nonprofit terminates contract
  - Software is described as a “poor fit” with an “overambitious sales pitch”
Case Study 2

- **Description:** Small, start up nonprofit coalition with a systems-change focus
- **Existing conditions:** Very limited staff capacity, has a grant award to implement software
- **Data needs:** Interested in creating a joint database with service providers in the area
- **Solution:** Area university comes to the rescue as pro-bono data manager! Software is purchased and implementation begins
Case Study 2 (continued)

- What happened?
  - No formal agreement with the university
  - Lack of engagement by key service partner
  - Collaborative data collection strategy remained undeveloped
  - Nonprofit terminates contract and blames the software system
  - Nonprofit is stuck with the bill
  - Foundation that funded the software no longer funds this nonprofit or efforts involving this software vendor
Creating More Successful Tech Solutions

? + = !
Step 1: People

- Find a champion
  - Usually someone in leadership
  - Integrate communication about the effort into operations
- Select someone who can implement and propel the effort forward
  - Choose a person who has a compatible mindset
  - Choose a clear communicator
  - Provide professional development if needed
  - Give authority that allows dedicated time
- Ensure ongoing capacity
Step 2: Process

- What outcomes will you measure?
- How will you define each outcome?
- What tools will you use to do so?
- Who is responsible for data collection?
- What are the timelines for doing so?
- What questions do you want to be able to answer at the end of the year?
Know Your Audience

- Who are the possible audiences for your data?
- What do they already know?
- What do they want to know?
- How will they use the data?
Creating a Framework for Identifying Appropriate Outcomes

What is a logic model?

A logic model is a simple description of how your program, service, or initiative works that shows the linkages between:

- Problem you are attempting to address
- Program components
- Program activities
- Outcomes (both short- and long-term)
What You Should Measure

Designing a good tool requires more time and attention than you may think.

Questions can tap into:
- Awareness
- Knowledge
- Attitudes
- Skills
- Behaviors
Types of Simple and Meaningful Tools

- Surveys
- Personal interviews
- Focus groups
- Other data collections tools
- Existing databases
Step 3: System

- Document processes first
- Choose the most simple solution that will get the job done
- Include leadership, data entry personnel and data analysts in these conversations
- Focus on how data relates to reporting
- Clarify/understand the organization’s responsibilities for making the effort successful
- Software is not the silver bullet
Wrap Up!

KEEP CALM AND ANALYZE DATA
LOGIC MODEL PROGRAM PLANNING TOOL for ________________

Program:
Target Population:

Existing Conditions:

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<th>Major Program Components</th>
<th>Program Activities</th>
<th>Short-Term Outcomes</th>
<th>Long-Term Outcomes</th>
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ClientTrack
Demonstration
Questions?

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