

Evaluator as Pilot: Presentation and Discussion of a Case Study on Dashboard Indicators.

Rafael J. Engel, University of Pittsburgh





My thanks to:

Dr. Hagit Hacoheh Wolf

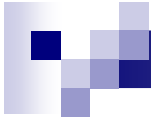
Dr. Nancy Strichman

Reference: Lawrence M. Butler. 2007. *The Nonprofit Dashboard: A Tool for Tracking Progress*. Washington, DC: BoardSource.



Context

- Information does not necessarily enable better decision making.
- Effective leadership looks forward.
- Too much emphasis on inputs and process, too little on outcomes.



The Program Evaluator

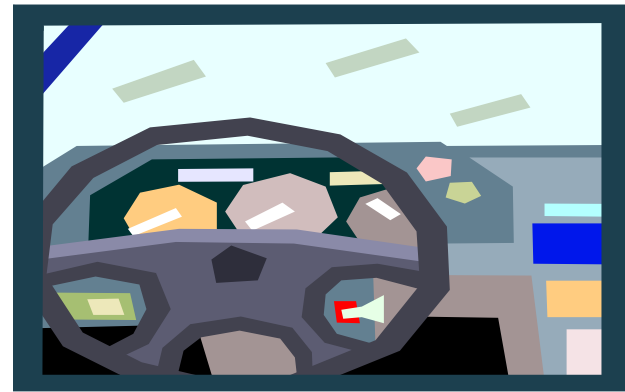
Technical Expert

Facilitator

Educator

Change Agent???

What is a Dashboard?



Annual Campaign as of 12/23/08

Please note that the amounts in the table below may differ from the financials for a variety of reasons including the date the numbers are pulled and/or how and where gifts are being counted. If you would like an even more detailed report,

- The numbers in bold are this year's numbers as of the date above
- The numbers in parenthesis are last year's final total

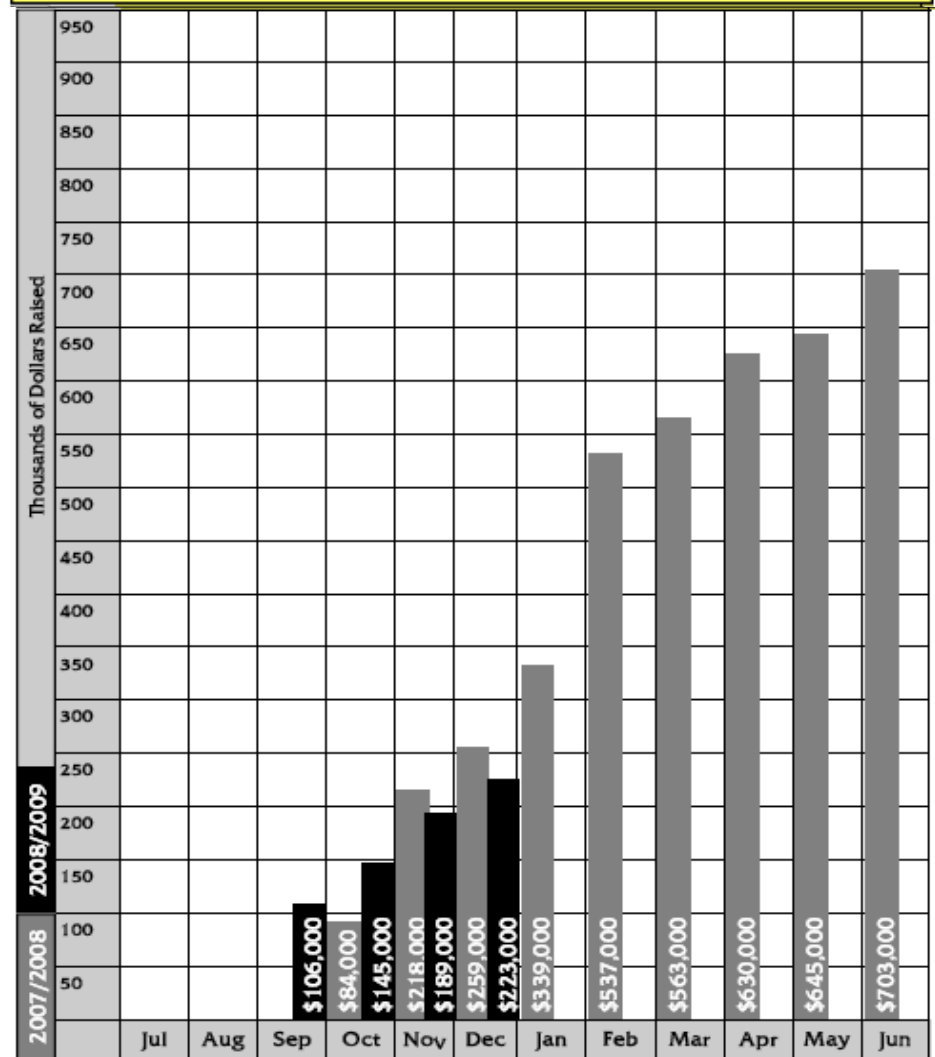
	Major Gifts (\$1,000+)	Other Gifts (\$1-999)	Total
Annual Campaign	\$154,032 (\$429,482)	\$10,002 (\$64,115)	\$164,034 (\$493,597)
Annual Event	\$1,800 (\$41,000)	\$0 (\$40,977)	\$1,800 (\$81,977)
Designated Gifts	\$43,834 (\$118,610)	\$6,870 (\$9,009)	\$50,704 (\$127,619)
Totals:	\$206,536 (\$589,092)	\$16,872 (\$114,101)	\$223,408 (\$703,193)

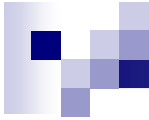
	Number of Gifts	Number of Donors	Number of New Donors	Average Gift
Annual Campaign	138 (645)	128 (583)	53 (271)	\$1,188 (\$715)
Annual Event	1 (263)	1 (249)	1 (120)	\$1,800 (\$312)
Designated Gifts	116 (86)	94 (41)	64 (28)	\$437 (\$1,189)
Totals:	255 (994)	223 (873)	118 (419)	\$993 (\$650)

Important

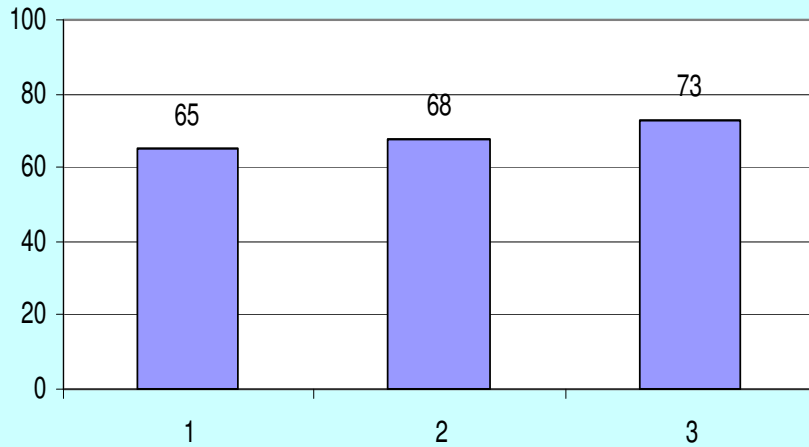
We can assure you that all the numbers are accurate. Everything being counted does indeed go toward the Annual Campaign. If you have any questions, please

07/08 & 08/09 Annual Campaign Comparison

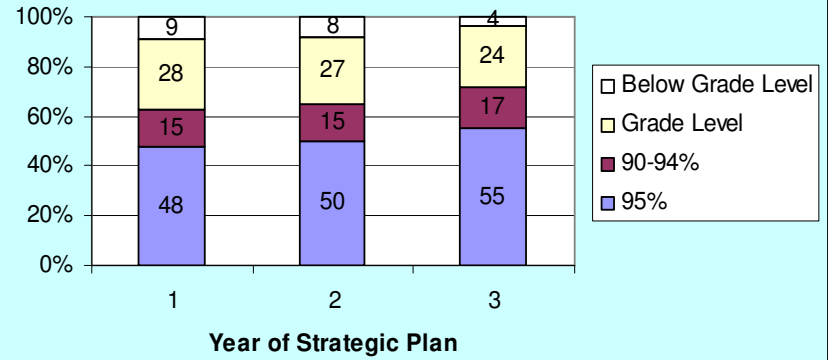




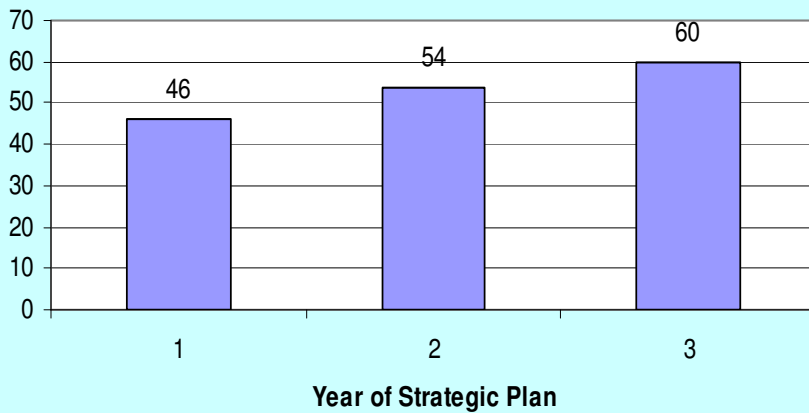
Entering CAS Honors



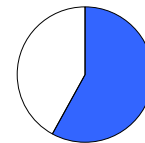
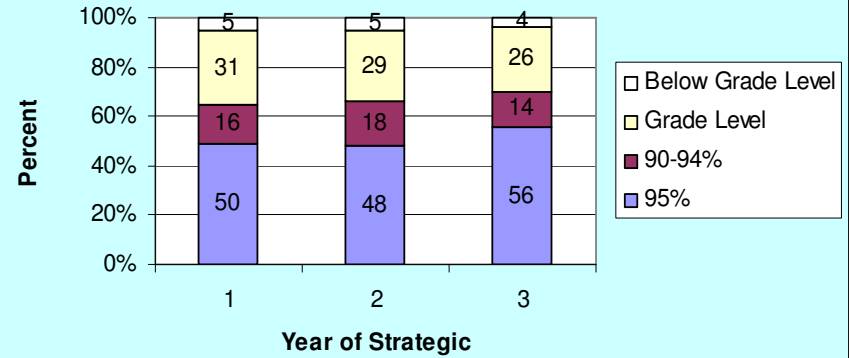
ERBs Quantitative Scores



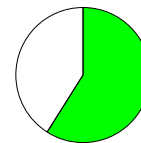
NETA Normed Hebrew Grade Level



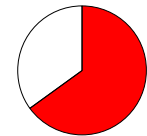
ERBs: Verbal



05-06 58%




06-07 59%



07-08 65%

HOPKINS Qualifiers

- 
- Visual
 - Indicators with a purpose
 - Easy to understand
 - Combines methods
 - Its simple
 - Comparative



What Should be Measured

- Relevant
- Tells the story
- Timely



Basis for Measures

- Mission Statement
- Strategic Initiatives
- Outcomes
- Units of Service
- Risk Factors



Mission Statement

Purpose	Audience	Method	Outcome
Enrich the community	Individuals & families of all background	Offering programs	Strengthen physical, intellectual, & spiritual health
Range and type of programs	Demographic & Community penetration	Number of programs	Participant experiences about the program



Strategic Initiatives

Initiative	Goal	Key Indicator
Increase number of clients	30% increase in five years	Annual number of participants
Enhanced reputation	90% favorable within 5 years	Perception of key stakeholders
Balanced budget	\$250,000/year reduction in loan	# of new revenue streams
Programmatic Quality	90% each year	Client satisfaction
Outcomes	70% living independently	% of clients not living in inst'l setting

Evaluator as Facilitator



Steps 1 – 3:

- Identify the focus
- Identify Key Indicators/Key Outcomes
- Criteria for success/failure

Evaluator as Technical Expert



Steps 4 - 7

- Translate into something measurable
- Procedures to measure
- Procedures to process the info
- Design the tool

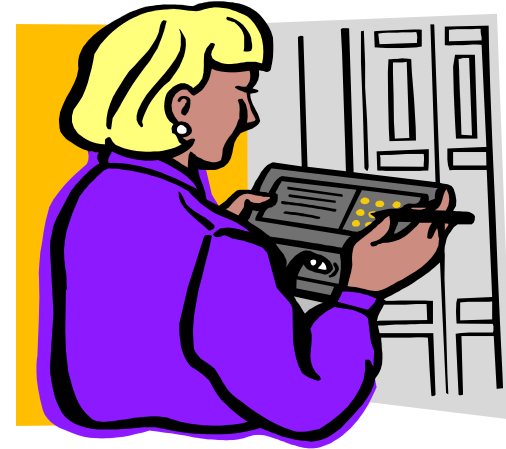
Evaluator as Educator

Step 8:

- Understand and Interpret the Data



Evaluator as Evaluator



Step 9

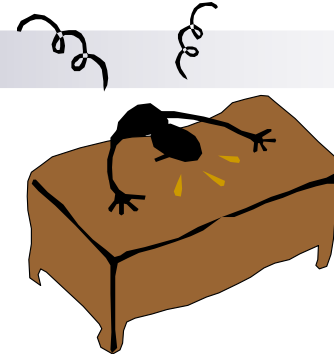
- Test and evaluate its utility

Evaluator as Change Agent

- Culture Change
- ???



Challenge of Outcomes



Program Area	Frequency of Collection	Performance Indicators	Outcomes
Senior Adults	Monthly	Demographics, clients served, programs offered, Web Site hits, Retention	
Jewish Connections			
Day Camping		Satisfaction, registration	
Wellness		Satisfaction, # of classes, attendance	
Family Services			