

Introduction to Measurement and Evaluation: Creating a Roadmap for Measuring Your Multiple Programs

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We will pose them to the
speakers for everyone to
hear.



Introduction to Measurement and Evaluation

Creating a Roadmap for Measuring your Multiple Programs

Thomas Knowlton & Chantell Johnson
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Outline of Presentation

- I. What “Story” do you Need to Tell?
- II. Key Issues in Corporate Community Involvement Measurement
- III. Defining Measurement and a Proposed Approach
- IV. Reporting Results

Section I: ***What “Story” do you Need to Tell?***

Thesis of the Presentation

Clear goals with strong social impact makes for a more compelling story to tell your stakeholders, resulting in greater impact for the business.

- **Why measure?** To capture results.
- **For whom?** Your stakeholders.
- **What do they need?** Proof that you are responding to their concerns.
- **What level of measurement?** It varies according to stakeholder.

Telling the Story

All your stakeholders need some level of the story – there is little understanding and a high degree of skepticism

- You are a company (not a foundation or a nonprofit) – why are you doing this?
- Are you just doing this just for the PR? To sell more products? To distract the press from other issues?
- Why are you spending money that could go to shareholders or employees? Or to reducing the cost of your product/service?
- Why are we supporting that cause or issue?

Telling a Compelling Story

The Typical Story

- Focuses only on the amount donated (We donate x% of our pretax net income)
- Appeals to the “general public” or everyone (We support education, arts & culture, the environment, the community and where our employees live and work)
 - *In the past 10 years, The American Product Company (APC) has donated more than \$15 million dollars in cash and in-kind contributions to hundreds of diverse non-profit organizations that have enriched communities worldwide.*

Telling a Compelling Story

The Compelling Story

- Tells the big picture (theme) and the specific social goals/results (signature program)
- Provides the rationale and the benefits to the business (the business case)
- **Version 1:**
 - *In the past 10 years, the American Product Company (APC) has transformed the lives of xxx children and xxx families in xxx communities.*
- **Version 2: even with limited resources, the story can still be compelling**
 - *In the past 10 years, the American Product Company (APC) has reached more than xxx communities in xxx countries, providing critical support to improve education and social services for children and their families.*

A Compelling Story: *Procter & Gamble*



**Live, Learn
and Thrive**



**Children's Safe
Drinking Water**

P&G Live, Learn and Thrive® Initiative.

Since its inception, ***P&G has improved life for more than 200 million children*** around the world through their Live, Learn and Thrive cause. Every second of every day, two children benefit from P&G Live, Learn and Thrive initiatives.

CSDW has reached more than 50 countries and saved thousands of lives.

Pampers and UNICEF: Working Together for Healthy Babies 45.5 million women and their babies have been protected against maternal and neonatal tetanus

Always and Tampax: Protecting the Futures of Girls Since 2006, Protecting Futures has worked with eight partners in 17 countries, reaching more than 80,000 girls in the developing world.

P&G and Hope Schools: A Long-Term Commitment to Education Success P&G Hope Schools have benefited over 100,000 children across China in the last 12 years

Safeguard: Building a Great Wall of Hygiene in China and Beyond The program's goal is to educate 10 million children in the next eight years.

Section II:

Key Issues in Corporate Community Involvement Measurement

Why Measure?

- **Increasing Expectations**
 - Internal and external stakeholders are demanding more “results”
 - Companies are expected to help address issues, not just give money
 - Employees, Potential Employees
 - Community Leaders, Government Officials
 - Customers/Clients
- **Competitive Advantage**
 - Most companies measure only outputs, not outcomes
 - Trend is toward defining specific goals for major programs
- **Program Improvement**
 - Findings can be relevant, timely and useful

Barriers to Measurement

- **Different programs have different expectations of “results” – lack of internal consensus on what to measure**
 - Portfolio of programs – major initiatives require more rigorous *outcomes* measurement
- **Limited budgets or support for deep measurement and evaluation**
 - Most companies have not engaged senior management effectively to gain support for increased measurement
- **Limited internal knowledge/capacity regarding measurement and evaluation**
 - Most companies have limited staff and do not have the capacity or knowledge to measure their programs

Multiple Stakeholders with Varying Needs for Results

Companies need to identify priority stakeholders, and determine the level of information and results needed by program for both internal and external stakeholders.

	Internal	External
Stakeholders (International, Regional, & Local)	<ul style="list-style-type: none"> • Employees • CEO/Board/Foundation Board • Senior Mgmt/Executive Team • Other Departments • Business Units • Domestic/International Offices • Shareholders • Business Partners 	<ul style="list-style-type: none"> • Key Opinion Leaders (Influencers) • Community Partners • Grantees • Consumers • The "Field" • General Public
Needs / Interests	<ul style="list-style-type: none"> • Business Impact – Reputation; Employee Involvement/Pride – Retention, Recruitment, Morale • Business Alignment/CSR Integration • Continuous Improvement, Learning about Best Practices • Social Impact 	<ul style="list-style-type: none"> • Community Expectations • Transparency • Social Impact

Section III: ***Defining Measurement & a Proposed Approach***

Defining and Guiding Measurement

1. Defining measurement for your company.
2. Understanding how measurement will be used.
3. Understanding the levels of information needed and by whom.
4. Understanding what can be measured. What is the overall approach for the portfolio?
5. Identifying the tools needed to measure.
6. Identifying who participates in measurement.
7. Understanding the estimated cost.

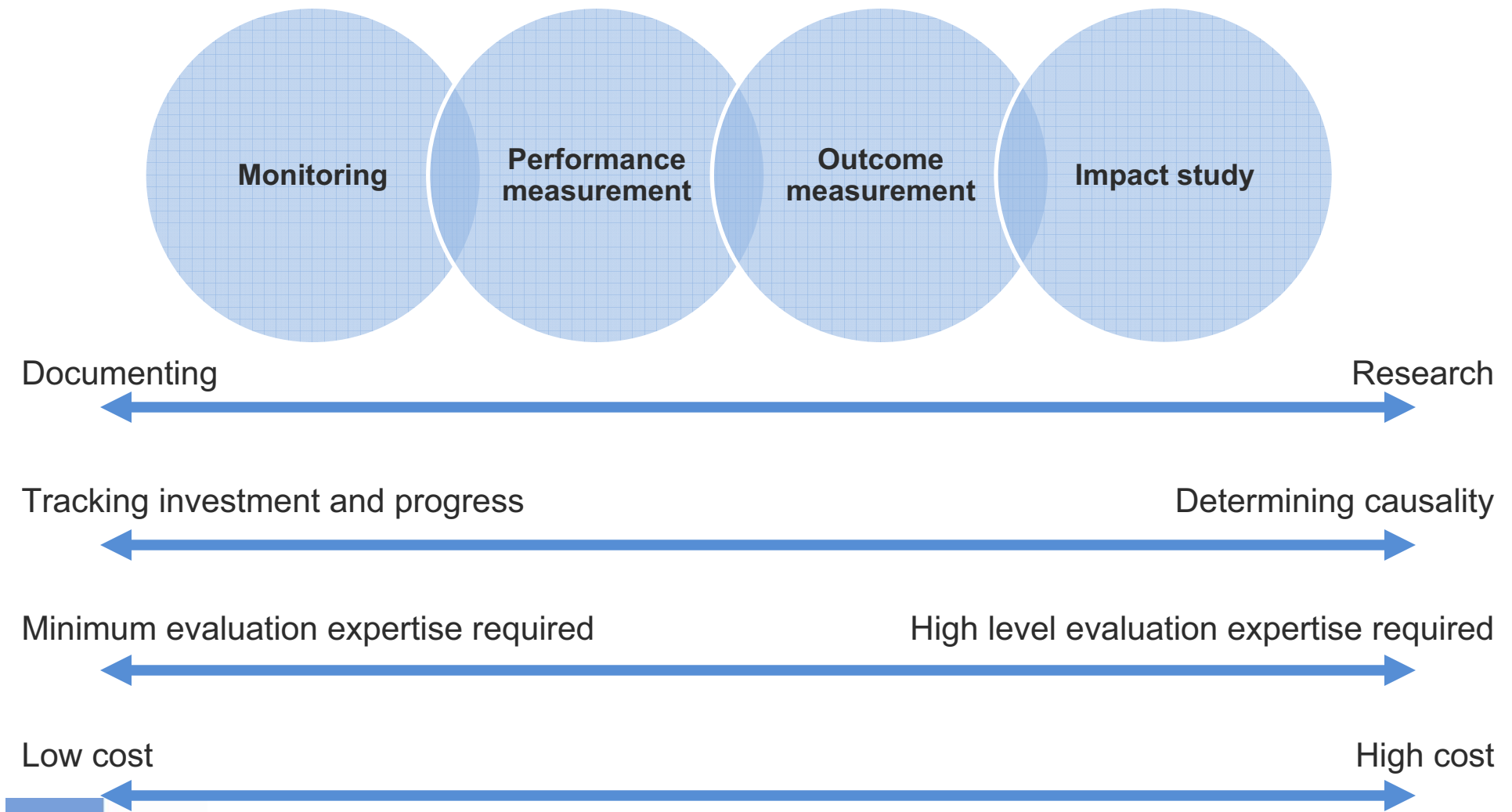
What is Measurement?

“ A systematic study conducted to assess how well a program is working...typically focused on achievement of program objectives.”

~The General Accounting Office (GAO)

Or, a method for finding out what happened & why...

Comparison of Different Types of Measurement

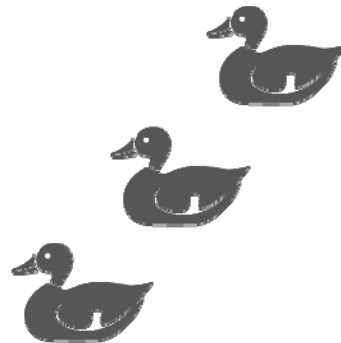
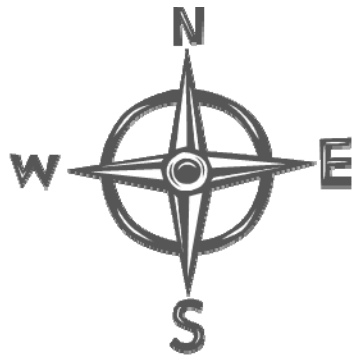


Approach to Measurement Makes a Difference

Proactive

vs.

Reactive

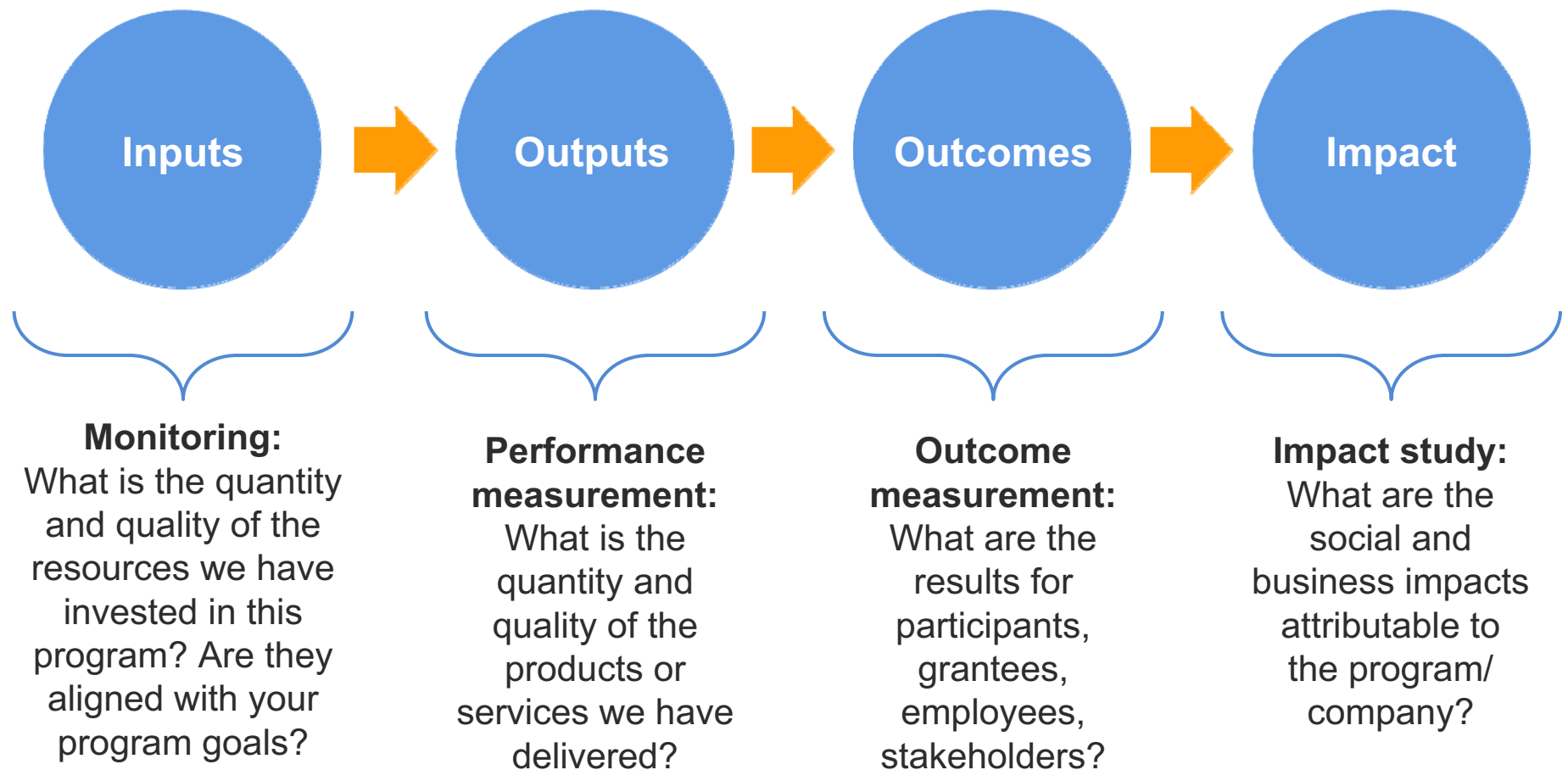




How Measurement is Often Used in the Corporate Sector

- To identify business impacts
- To better plan their work
- To improve program implementation
- To monitor how well they are doing in meeting their goals
- To make a clear business case for community investment

What Can Be Measured?



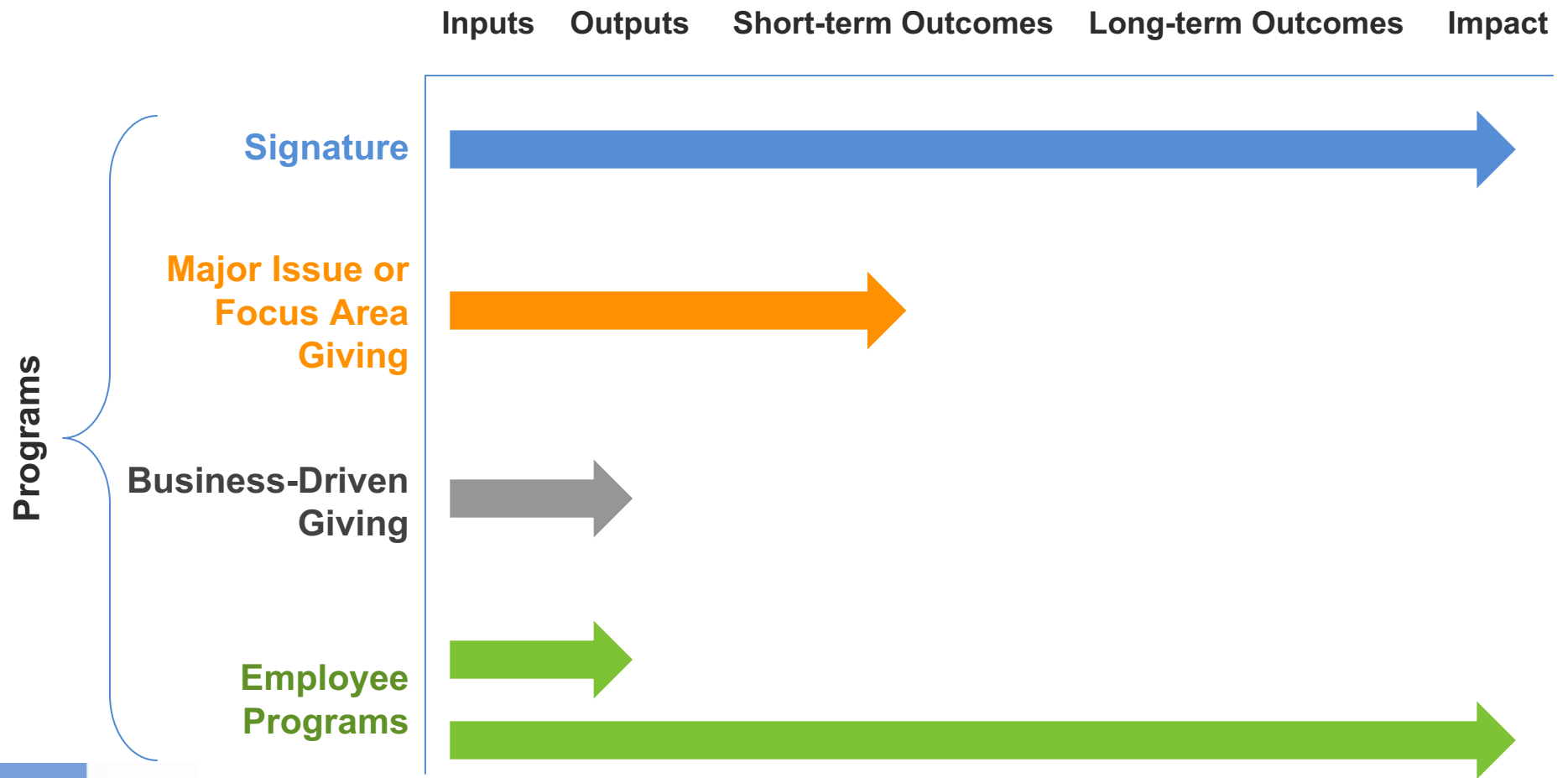
A Portfolio of Programs

Which Programs Need to be Measured?

Companies can break their giving programs into the following categories:

Program	Content	Key Stakeholder(s) Reached
Signature	Focused	All
Major Issue or Focus Area Giving	Focused on several issues	Domestic/International Offices; Community Partners; Employees
Business / Client-Driven	Broad and unlimited issues	Clients; Business Partners; Plant Communities
Employee Engagement (Volunteerism, Dollars for Doers, Matching Gifts, etc.)	Broad and focused on several issues	Employees; Community Partners

Types of Measurement Needed by Types of Program



Sample Data Collection Methods, Tools

In House:

- Financial databases/reporting
- Gifts databases
- Grantee reports
- Line of Business systems and reports
- Existing survey data (consider marketing and sales information)

External:

- Document/File Review
- Surveys
- Interviews
- Focus Groups
- Core Capacity Assessment Tool (CCAT)

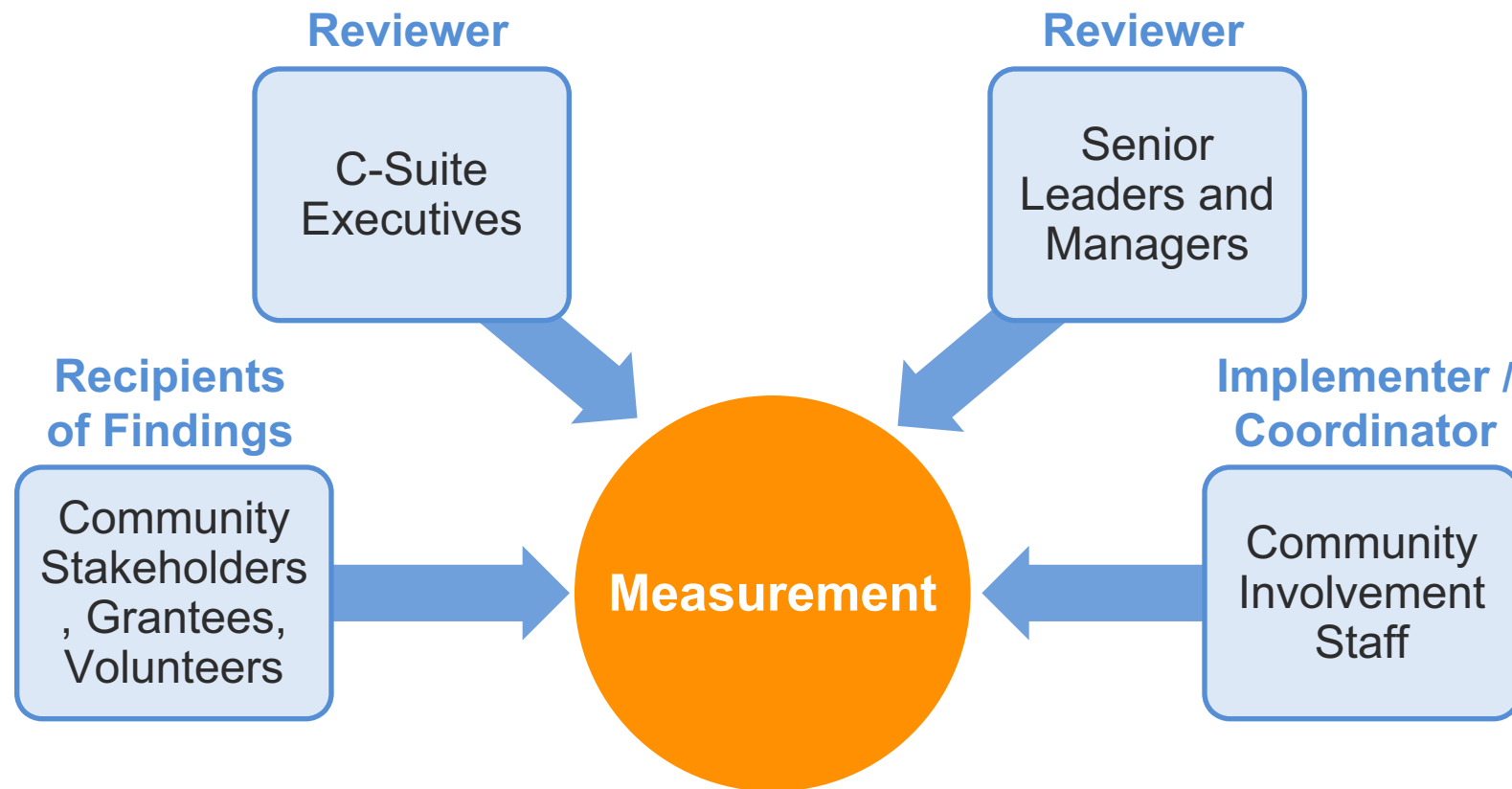
An Example: APC

Program	Content	Resources	Measurement Level	Measurement Tools
Signature Program: Teacher Training in Grand Ville	Targeted support of teachers in 3 public schools in poor communities	\$300,000 annually 500 volunteers Employee contributions	Outcomes	<ul style="list-style-type: none"> • Teacher survey • Employee survey
Major Focus Areas: Education, Social Services	Support of critical needs in education and social services in communities where employees live and work	\$25,000 per location; 15 locations; \$375,000 annually 50 employees per location	Outputs	<ul style="list-style-type: none"> • Financial databases • Grantee reports
Business / Client-Driven	Support for events, organizations based on client requests	\$50,000 annually	Inputs	<ul style="list-style-type: none"> • Financial databases
Employee Engagement (Volunteerism, Dollars for Doers, Matching Gifts, etc.)	Support for matching gifts and dollars for doers	\$200,000 annually	Outputs - Outcomes	<ul style="list-style-type: none"> • Financial databases • Employee survey

Using SMART Criteria for Assessing Your Measurement Plan

- **Specific:** Define the target, focus efforts
 - Who, What
- **Measurable:** Define the criteria, obtain feedback
 - How much, How many, How will I know?
- **Action-oriented :** Define/align the desired change/movement
 - Verb (Increase, Decrease, Improve, etc.)
- **Relevant to Outcome level:** Align to level of change...
 - Individual, Organization, System
- **True to Program Mission:** Align to...

Who Participates in Measurement? What role do they play?



Key Takeaways

Maximize the resources you already have

- People (time and expertise)
- Money
- Technology
- Partners
- Leadership
- Existing data/ tools (Program participation, Program Reach, Marketing data, Company data, local data about the region and community)

Leverage the resources of other departments

- HR
- Marketing

Select your measurement level based on your resources, the program you want to measure, and the type of information you need for your targeted audiences

Section IV: ***Reporting Results***

Ready to Report

Now that you have:

1. Determined why you want to measure your results
2. Decided to whom you want to communicate
3. Decided which programs and what about them to measure
4. Created and implemented a measurement plan



You're ready to report your results!

Planning for Reporting

How you report varies

- By the audience(s) you are trying to reach
- By the type of program you are measuring / the results you have
- By the level of resources you can direct toward reporting

Types of Reporting

The way you communicate your results depends upon the level of measurement you did and the stakeholders you are trying to reach

Program	What You Measured	Key Stakeholder(s) to Communicate to	Ways to Communicate
Signature	Impact; Long-term outcomes	All	<ul style="list-style-type: none"> • Annual report • Company website • Sharing results with field through conferences and publications
Major Issue or Focus Area Giving	Outputs; short-term outcomes	Regional Stakeholders; Community Partners; Employees; Senior Leadership	<ul style="list-style-type: none"> • Annual report • Company website • Local/regional press • Intranet articles • Report for Sr. Leaders
Business-Driven Giving	Inputs	Clients, Business Partners	<ul style="list-style-type: none"> • Report for internal use on the clients you responded to and the orgs you supported
Employee Programs	Primarily inputs and outputs; some short-term outcomes	Employees; Community Partners; Senior Leadership	<ul style="list-style-type: none"> • Annual report • Company website • Intranet articles • Local/regional press • Report for Sr. Leaders

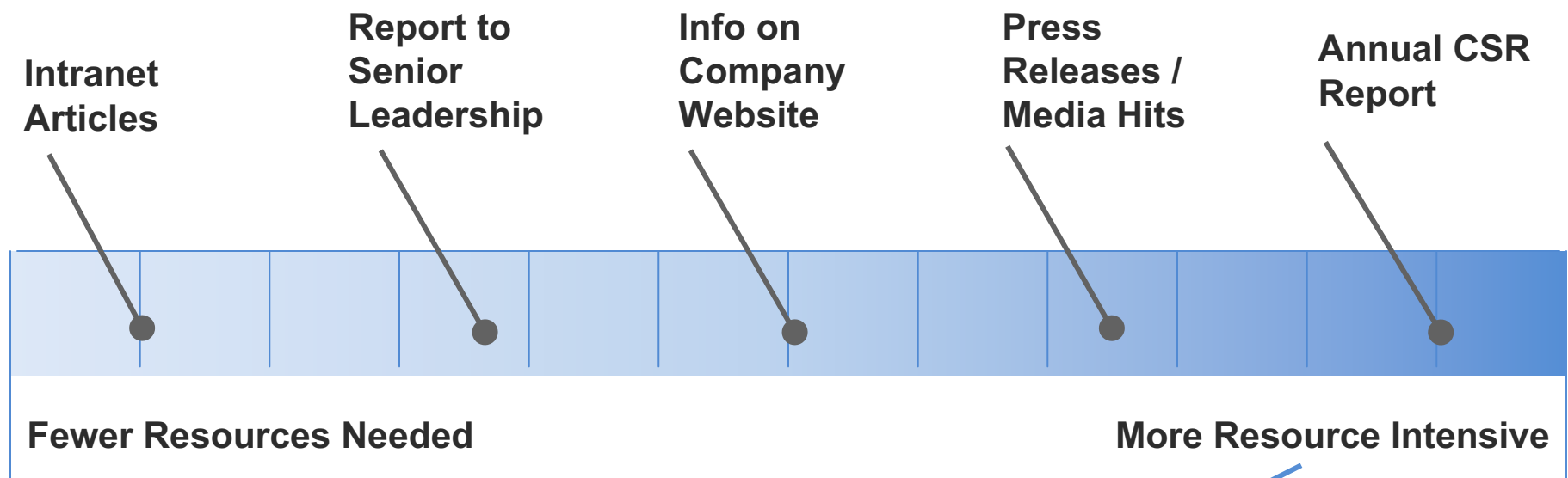
Types of Reporting

Another way of looking at reporting takes into account whether the audience is internal or external and the content is informal or formal

Formal	<ul style="list-style-type: none">• Annual CSR Report• Company website• Reports to Senior Leaders	<ul style="list-style-type: none">• Annual CSR Report• Press releases• Media stories• Company website
	<ul style="list-style-type: none">• Stories on company intranet• Presentations to groups of employees	<ul style="list-style-type: none">• Meetings with community groups
Internal		External

Types of Reporting

You will also need to take into account the resources (time, expertise, \$) you have to put toward your communication efforts



For more resource intensive efforts, try to tap into the existing communications, design, and marketing expertise in your company

Best Practices in Reporting

- **Tailor to audience**
 - What do they care about?
 - What is in it for me?
- **The right amount of info**
 - How comprehensive does it need to be?
 - How will they use the info?
- **Tap into 3rd party endorsements**
 - Ask nonprofit partners to tell others about your good works
- **Employees can be your most important group**
 - Ambassadors to the rest of the world about your programs
 - Being aware of programs is powerful, even for those who don't participate

Many Benefits of Reporting



Getting Started

Taking the First Steps

What stories do you need to tell?

1. Identify the Goals/Stories for some or all of your programs
 - What level of information do your stakeholders need about this program?
2. Develop a measurement plan
 - What will I measure and how?

What resources do you need?

1. What resources do I have internally that can help me?
2. Should I bring in a third party expert to assist with the development of our programmatic goals and a detailed measurement plan?

Q & A

Thank you!

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Measurement and Evaluation with VolunteerMatch Tools

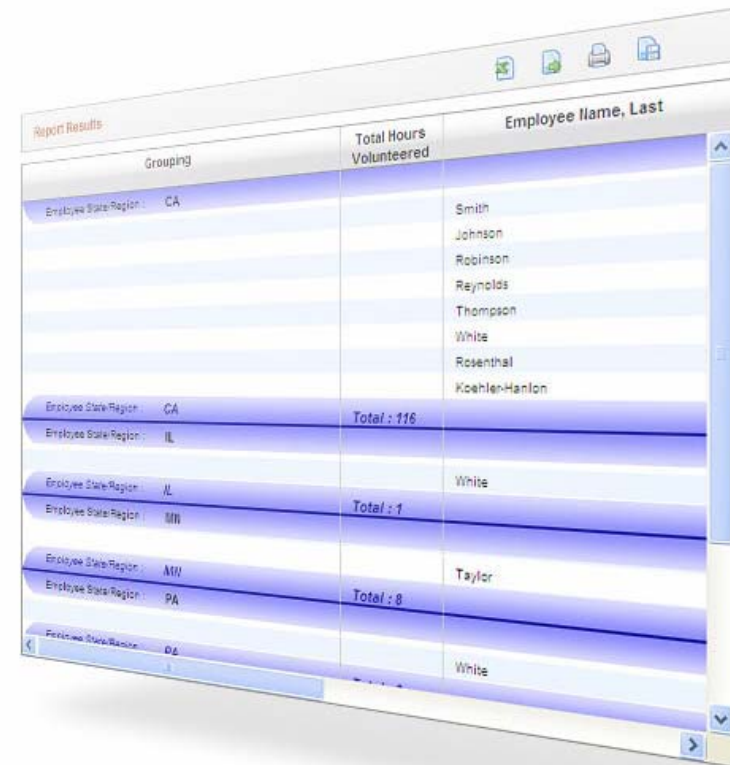
Custom Question Manager

Custom questions appear on referral forms when volunteers express interest in opportunities.

Add a new question:

Question	Form Element
Title	<input type="text"/>
Business Unit	<input type="text"/>
Division	<input type="text"/>
Location	<input type="text"/>
Department	<input type="text"/>
Immediate Supervisor	<input type="text"/>

- Customize questions to gather information
- Pull reports on your data



The screenshot shows a web application window titled "Report Results". It contains a table with three main columns: "Grouping", "Total Hours Volunteered", and "Employee Name, Last". The table is filtered by "Employee State/Region". The data is grouped by state/region, with a "Total" row for each group. The "Employee Name, Last" column lists individual volunteers for each state/region.

Grouping	Total Hours Volunteered	Employee Name, Last
Employee State/Region: CA		Smith
		Johnson
		Robinson
		Reynolds
		Thompson
		White
		Rosenthal
		Koehler-Hanlon
Employee State/Region: CA	Total : 116	
Employee State/Region: IL		
Employee State/Region: IL		White
Employee State/Region: MN	Total : 1	
Employee State/Region: MN		Taylor
Employee State/Region: PA	Total : 8	
Employee State/Region: PA		White
Employee State/Region: DE		

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