

# Transforming Data into Knowledge: Measuring Performance and Impact

# Agenda

- Introductions/ Overview
- A framework for data and impact
- Case Studies
  - Grantmakers for Effective Organizations (GEO)
  - New Leaders
- Q & A

# About Us

Rem Hoffmann

*Founder, CEO*



Alison Anderson

*Manager of Operations*



Venus Devnani

*National Director of Operations  
& Business Solutions*



# Data is...



# 3 questions:

1. How do you make data useful and meaningful?
2. How to report on mission success to stakeholders
3. What technologies do you use to manage data?



# A Framework for Discussing Data

# Imperative: Social Impact

Nonprofit organizations are under tremendous pressure to demonstrate social impact.



# Imperative: Social Impact



**Demonstrated  
Social Impact**

# Getting to Social Impact

## INPUTS

- Donations, Grants, Earned revenue, Staff, Volunteers

## ACTIVITIES

- Programs run; services offered

## OUTPUTS

- Metrics on the results of activities.

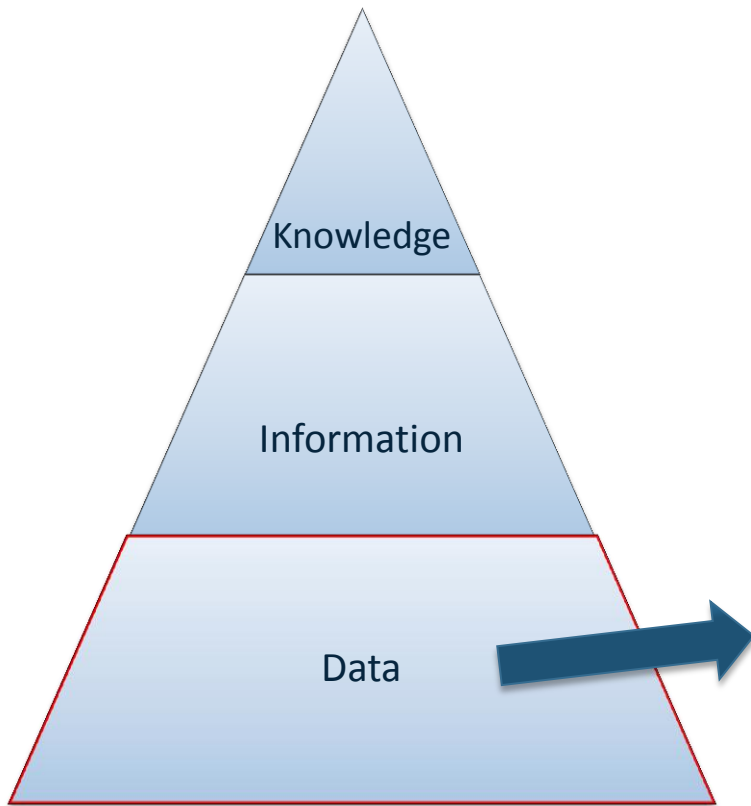
## OUTCOMES

- The effect on your output on your constituent or community



**Demonstrated  
Social Impact**

# Hierarchy of Data in Nonprofits



**Data** is the base of the hierarchy. It includes your organization's:

- Observations
- Data points
- Raw data

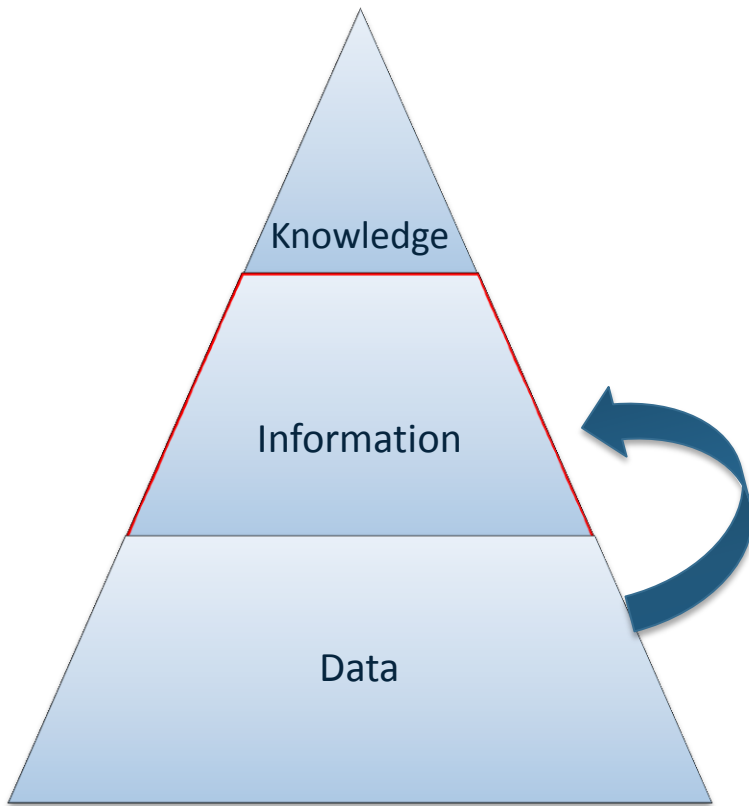
Data is created by:

- Gathering
- Created in business processes

Systems involved include:

- Paper records
- Spreadsheets
- Databases
- Forms and surveys

# Data into Information



Conceptually, **Information** conceptually is that which is used to communicate with others, both within and outside your organization.

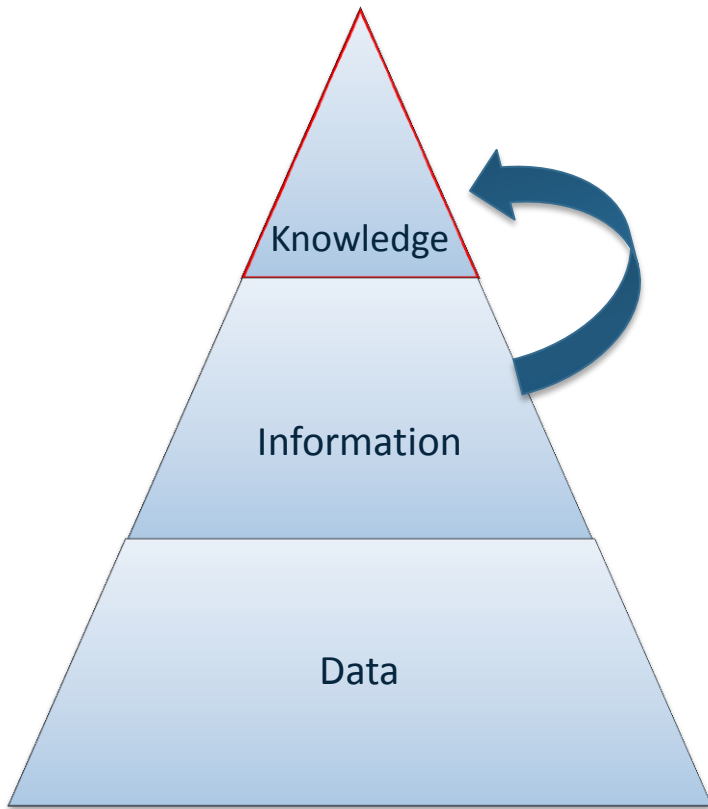
Information is created by:

- Organizing,
- Aggregating,
- Analyzing, and
- Putting data in context

Systems involved include:

- CRM
- Business Process systems (fundraising, financial, program)
- Reporting and analytics

# Information into Knowledge



**Knowledge** is the experience and understanding of a person or organization.

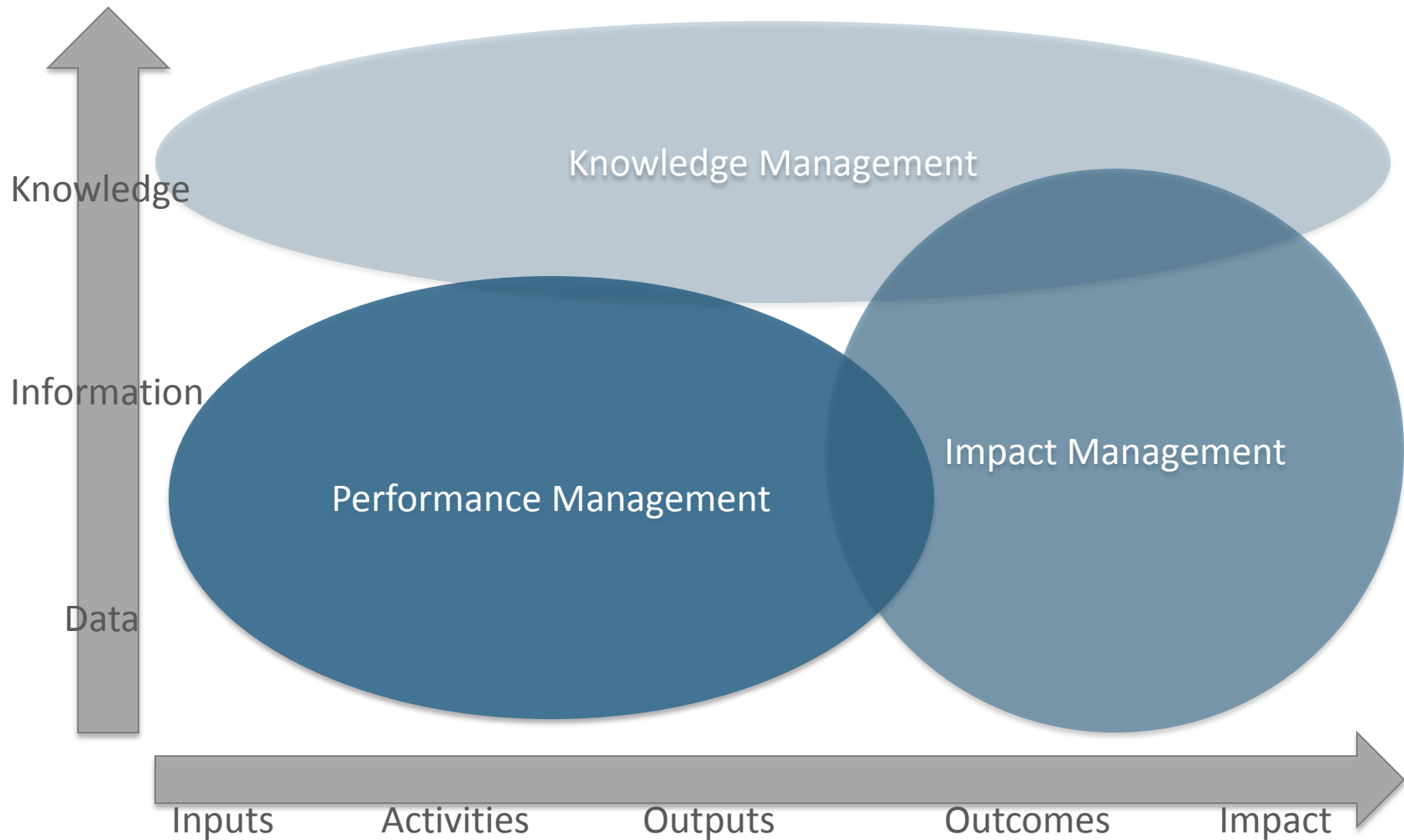
Knowledge is created through

- Sharing information
- Codifying
- Learning, and
- Using information.

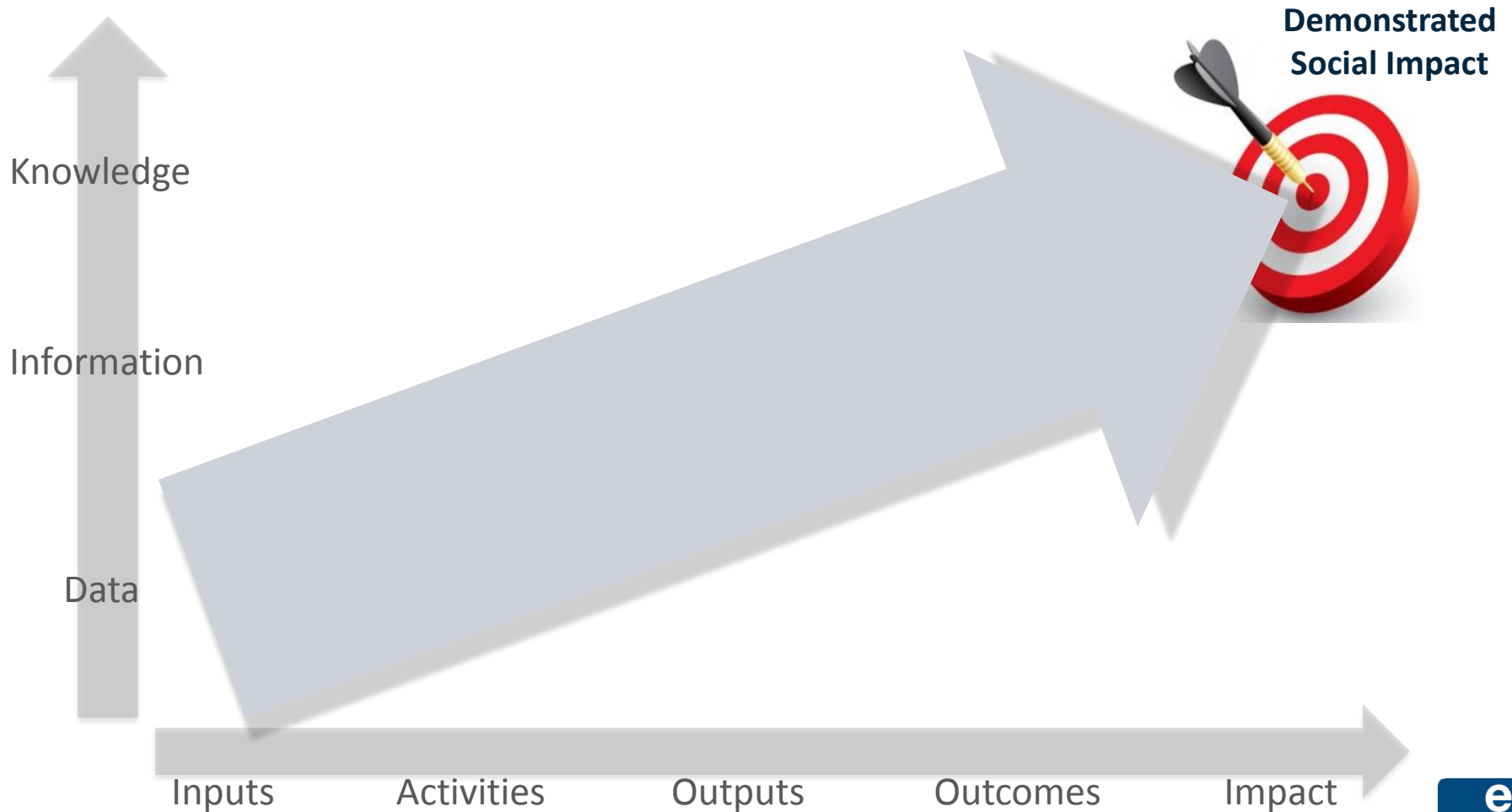
Systems involved include:

- Collaboration systems
- Publishing
- Content management
- Reporting and analytics

# Nonprofit Data Landscape



# Roadmap to Social Impact



# Grantmakers for Effective Organizations

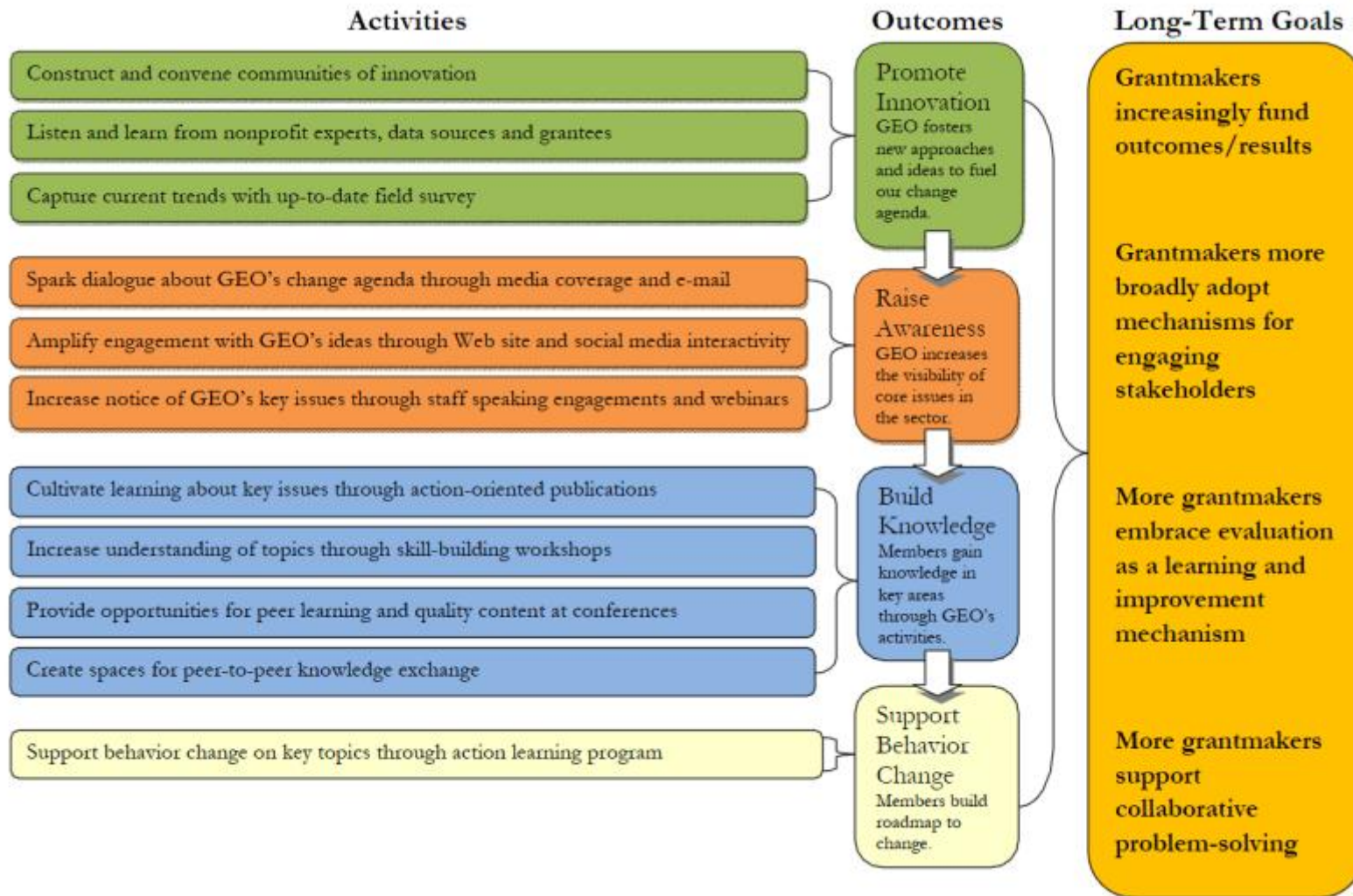
# About GEO: Mission & Programs



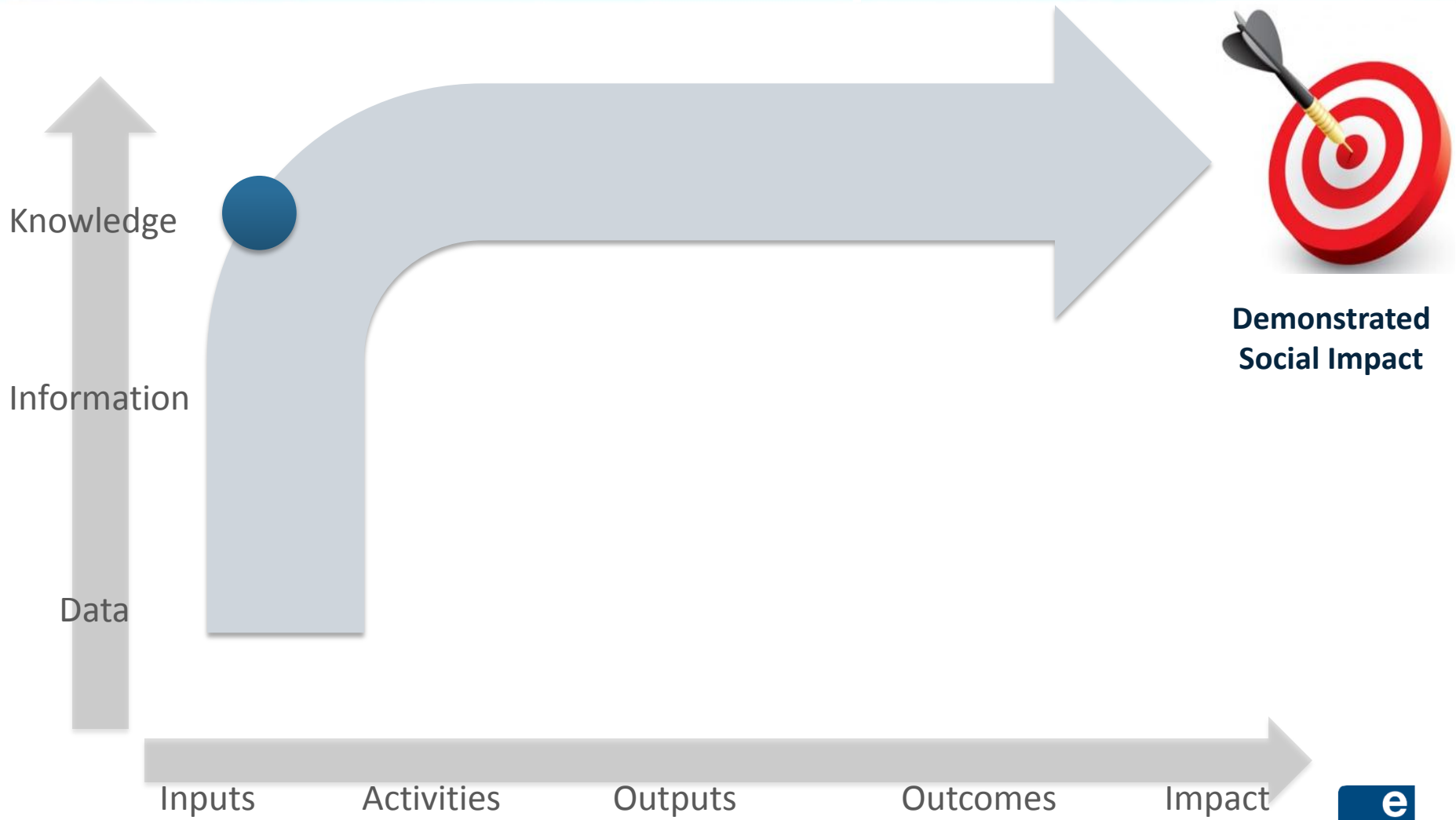
Smarter grantmaking.  
Stronger nonprofits.  
Better results.

**Mission:** Understanding that grantmakers are successful only to the extent that their grantees achieve meaningful results, GEO promotes strategies and practices that contribute to grantee success.

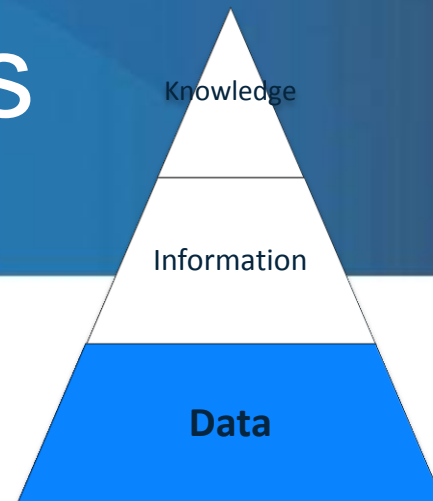
# Logic Model: TOC + Metrics



# Knowledge about Members Enables Impact



# Data System Collects Bits and Bytes



 Organization  
The Cameron Foundation

Customize

- Details
- Contacts
- Grant Opportunities
- Other Opportunities
- Open Activities
- Completed Activities
- Notes And Attachments
- Media Coverage
- Affiliations
- Hotel Room Block
- Campaigns

[Account History](#)

## Organization Detail

[Edit](#) [Delete](#)

Organization Name The Cameron Foundation [\[View Hierarchy\]](#)

Inactive 

Organization Type Grantmaker

Website <http://www.camfound.org/index2.html>

Grant Cycle

EIN 200097152

Funding Interests

Current GEO Funder? No

Previous GEO Funder? No

Registration Link

## Organization Summary Reports

[All Active Contacts](#)

[Contact Summary \(inactive contacts included\)](#)

[Committee Participation](#)

[Volunteer Activity](#)

[Event Attendance \(Workshops, GEO Conferences, Webinars\)](#)

[Action Learning Attendance \(Peer Groups and Skill-building Seminars\)](#)

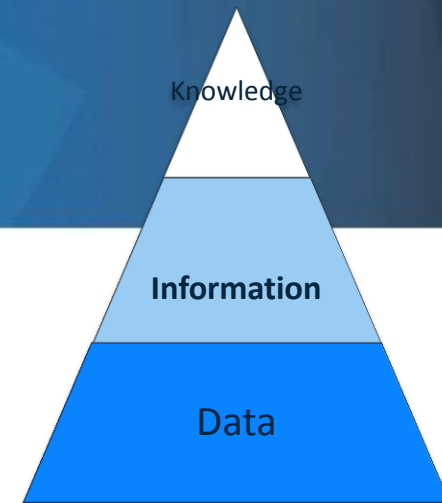
[Membership History](#)

[Grant History](#)

[Publication Orders](#)



# Aggregated Data Leads to Insights



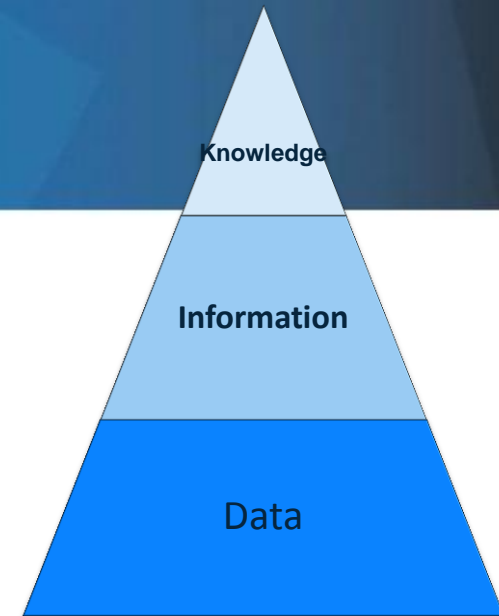
## Event Attendance

<input type="checkbox"/>	<b>Contact Full Name:</b> <u>Lindsey, Jr., Handy</u> (4 records)
	<b>Campaign Name:</b> <u>GEO 2008 National Conference and 10th Anniversary Celebration</u> (1 record)
	<b>Campaign Name:</b> <u>GEO 2010 National Conference Attendees</u> (1 record)
	<b>Campaign Name:</b> <u>Powerful Partnerships: Grantmaker Practices that Improve Grantee Performance</u> (1 record)
	<b>Campaign Name:</b> <u>SWW: 2011.02.11 Funders and Adv Grp Gathering (including quests) in D.C.</u> (1 record)
<input type="checkbox"/>	<b>Contact Full Name:</b> <u>Haskins, Conaway</u> (1 record)
	<b>Campaign Name:</b> <u>Powerful Partnerships: Grantmaker Practices that Improve Grantee Performance</u> (1 record)
<input type="checkbox"/>	<b>Contact Full Name:</b> <u>Thomas, Naimah</u> (2 records)
	<b>Campaign Name:</b> <u>GEO 2008 National Conference and 10th Anniversary Celebration</u> (1 record)
	<b>Campaign Name:</b> <u>GEO 2010 National Conference Attendees</u> (1 record)
<input type="checkbox"/>	<b>Contact Full Name:</b> <u>Stebbins, Risha</u> (1 record)
	<b>Campaign Name:</b> <u>GEO 2010 National Conference Attendees</u> (1 record)

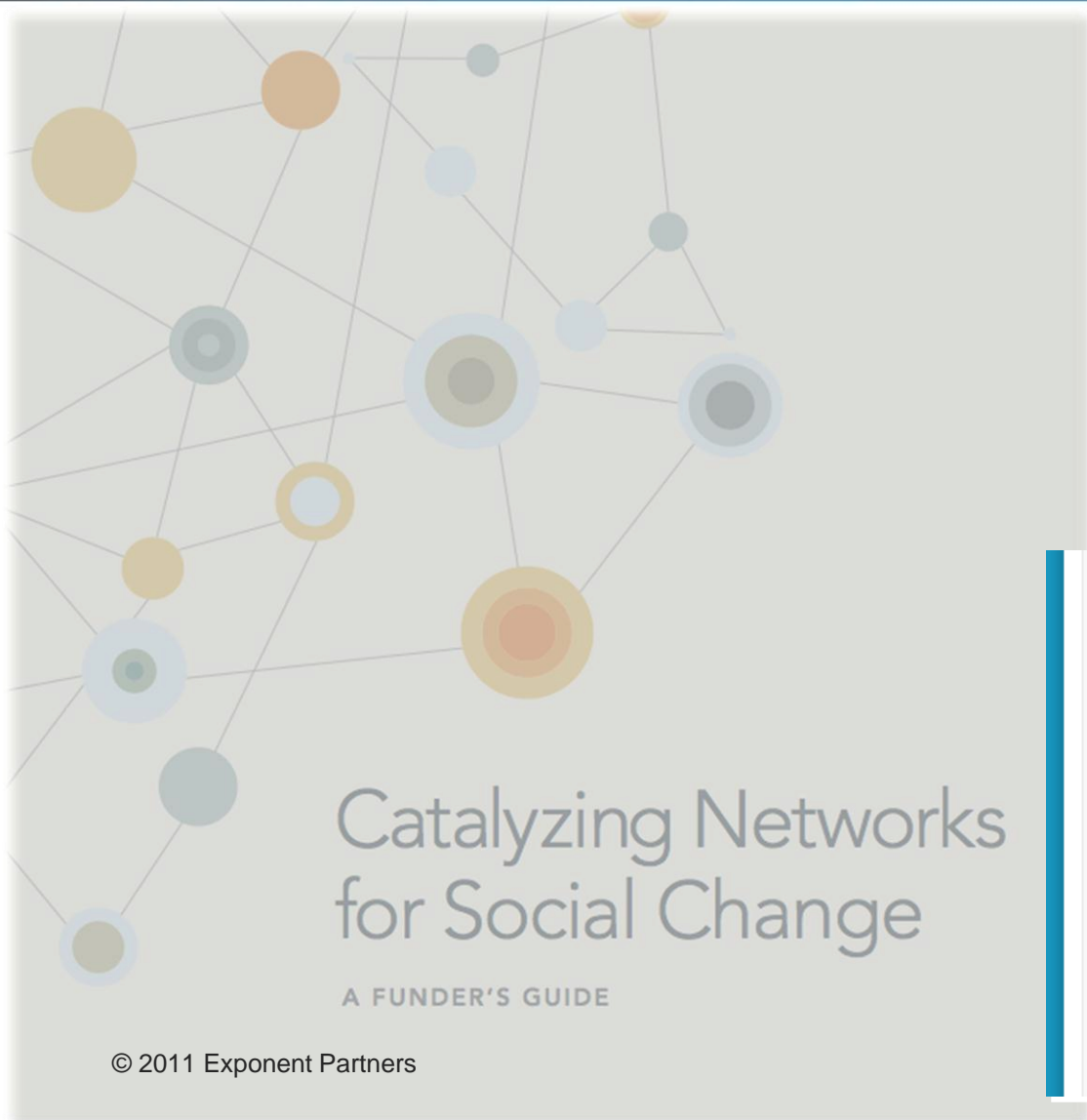


# Insights Become Knowledge

	A	B	C
1			Sample Member
2	<b>In-Person Engagement (over the past year)</b>		
3	Speaking Engagement Attendance	2	2
4	Conference Registration (1-2, 3-5, 6-7, 8+)	3, 5, 7, 8	
5	Seminar Registration	4	
6	Action Learning Participation	6	
9	<b>Volunteer Service (over the past year)</b>		
10	Peer Review GEO Content	4	
11	Committee Service (1 staff, 2 staff)	7, 8	
12	Board of Directors Service	10	
13	Member Recruitment Outreach	5	
14	Speaking at a GEO Event (1 staff, 2 staff)	3, 4	
15	<b>History with GEO (throughout their membership)</b>		
16	Members > 3 years	6	
17	Members < 1 year	-6	-6
18	Paid Membership as Part of Other Contribution	-3	
19	Established Primary Contact (> 3 years)	4	
20	Former Board Member	4	
21	Current Grant Funder (GenOp, Program)	8, 6	
22	Former Grant Funder	4	
33	<b>Accessing GEO Staff (over the past year)</b>		
34	In-Person Meeting with Senior Management	7	7
35	In-Person Meeting with Other Staff	5	
36	Significant E-mail or Phone Correspondence with Sr. Mgmt.	5	
37	Significant E-mail or Phone Correspondence with Other Staff	3	3
38	<b>Bench Strength (current)</b>		
39	> 5 Users	3	3
40	If < 3, Small Staff (< 10 staff)	2	
41	Updated Staff List (over the past year)	1	
42			
43	<b>Total Possible Points</b>		11



# Data Automation Makes Life Easy



## Dashboard Publications Dashboard

### Top Downloads this Month

Content: Title	Record Count
GEO 2011 Catalyzing Networks for Social Change: A Funder's Guide	635
GEO 2011 Widespread Empathy: 5 Steps to Achieving Greater Impact in Philanthropy	262
GEO 2010 Due Diligence Done Well: A Guide for Grantmakers	109
GEO 2010 Coaching and Philanthropy: An Action Guide for Grantmakers	72

### Top Downloads YTD

Content: Title	Record Count
GEO 2011 SWW What Do We Mean by Scale?	3K
GEO 2011 Catalyzing Networks for Social Change: A Funder's Guide	3K
GEO 2010 Due Diligence Done Well: A Guide for Grantmakers	2K
GEO 2009 Executive Summary Evaluation in Philanthropy: Perspectives from the Field	2K
GEO 2011 Widespread Empathy: 5 Steps to Achieving Greater Impact in Philanthropy	2K

ry	57
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# NEW LEADERS



**Venus Devnani**

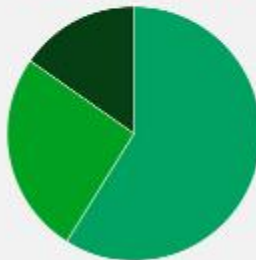
**National Director of Operations & Business Solutions**

# New Leaders Mission

Our mission is to ensure high academic achievement for all children, especially students in poverty and students of color, by developing transformational school leaders and advancing the policies and practices that allow great leaders to succeed.

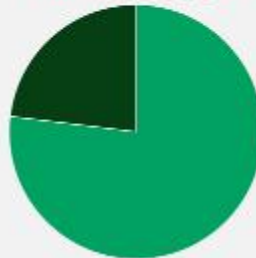
NEW LEADERS ARE DIVERSE IN MANY WAYS, BUT BOUND BY THEIR COMMON BELIEF IN HIGH ACADEMIC ACHIEVEMENT FOR ALL STUDENTS

## School Level



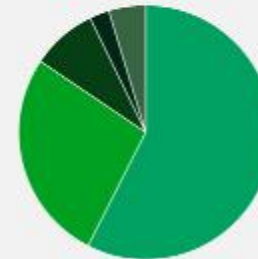
59% Elem.  
25% High School  
15% Middle

## School Type



77% District  
23% Charter

## Ethnicity



58% African-American  
27% White  
8% Hispanic  
3% Asian  
5% Other

# Our Programs

## **Emerging Leaders**

Grow New Leader candidates

## **Aspiring Principals**

Recruit and place the best New Leaders

- 10 years
- 800 Leaders
- 12 Urban Areas
- More than 250,000 students

## **Leadership Development Services**

Teach leadership effectiveness

# Our Theory

**Principal and Teacher Effectiveness  
drive Student Outcomes**

Principal  
Effectiveness

Teacher  
Effectiveness

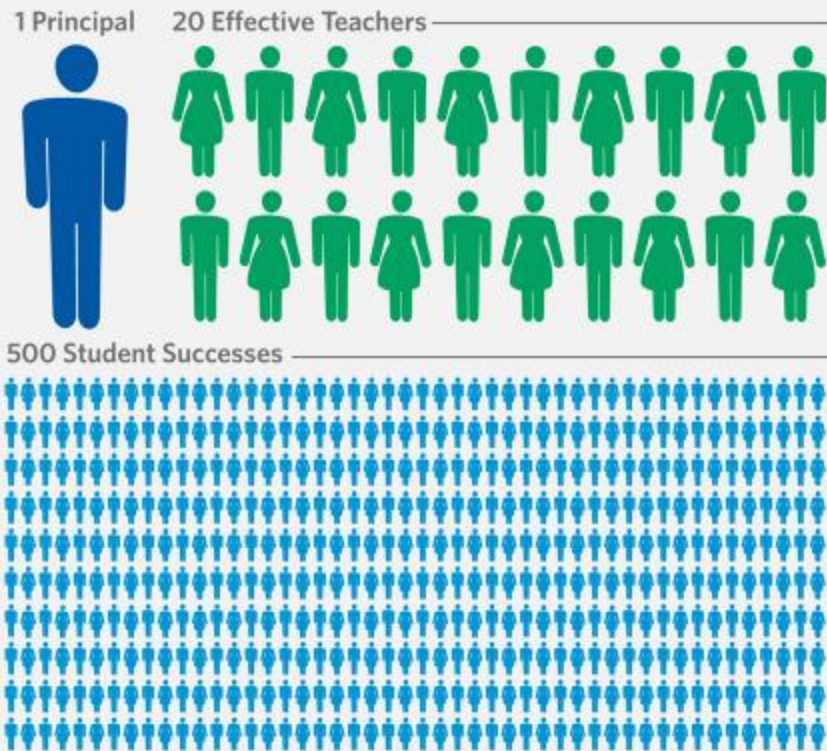
Student  
Outcomes

The principal has  
a direct impact on  
teacher effectiveness

Teachers have  
a direct impact on  
student outcomes

# Our Theory

## PRINCIPALS HAVE A MULTIPLIER EFFECT

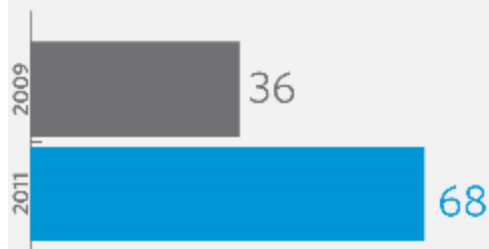


Approximate numbers based on national averages

# Our Impact

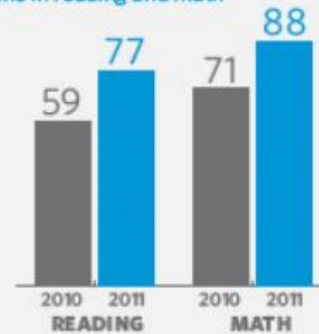
## BETHUNE SCHOOL OF EXCELLENCE

Math gains made during tenure:  
Percentage of students at proficiency

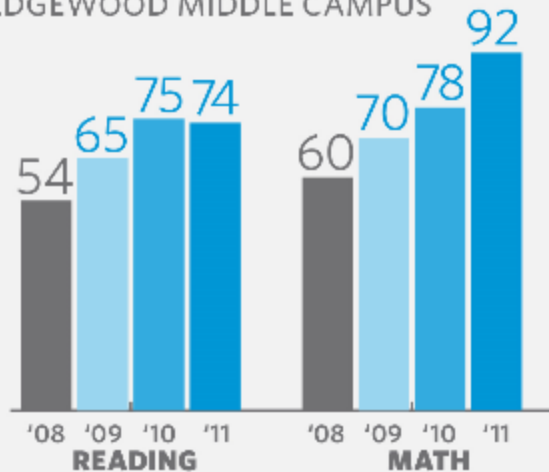


## NEW FIELD PRIMARY SCHOOL

Gains in reading and math



## DC PREPARATORY ACADEMY— EDGEWOOD MIDDLE CAMPUS

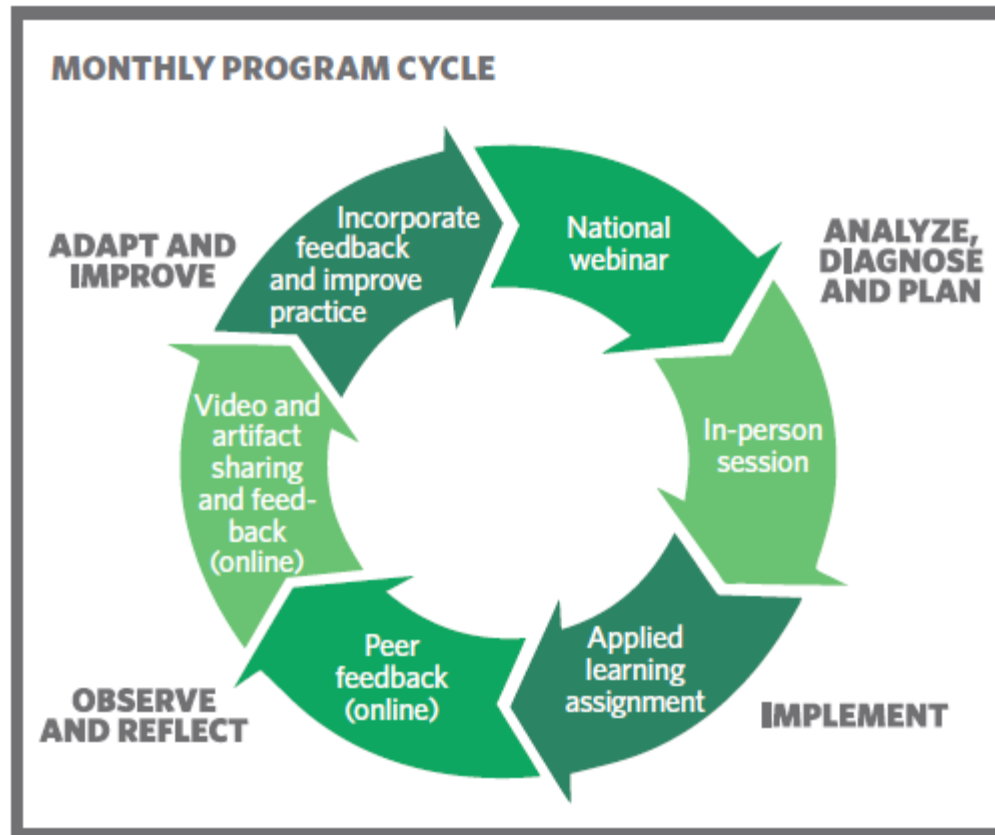


## MCKINLEY TECH HIGH SCHOOL

Gains in reading and math during tenure



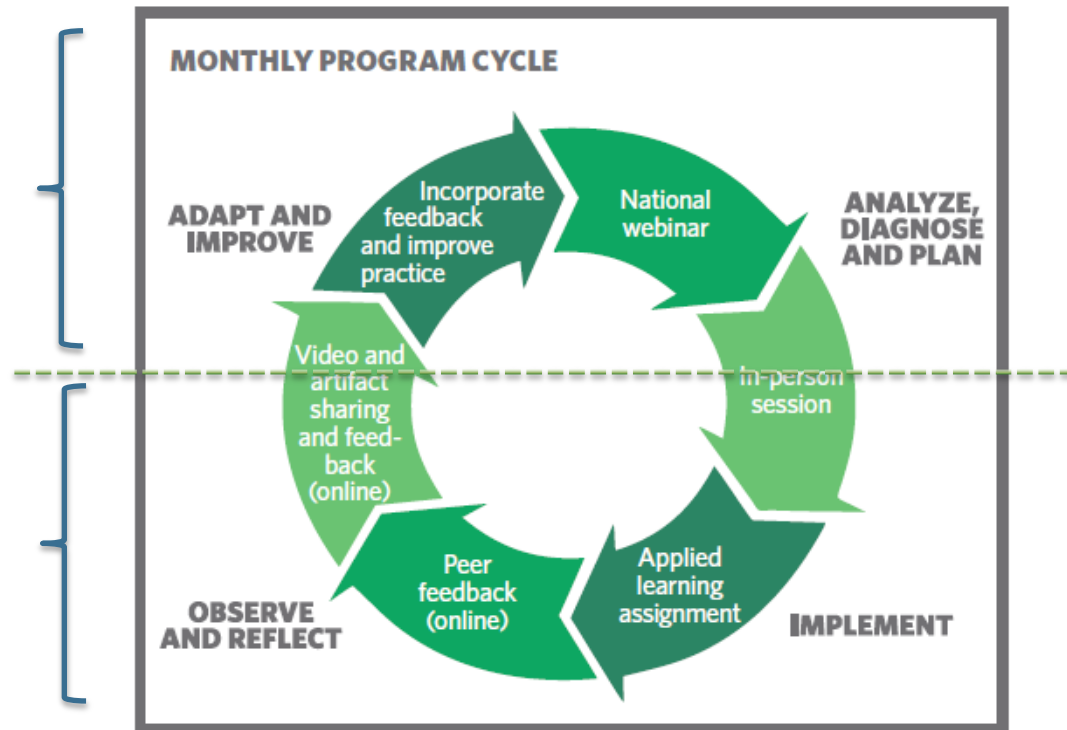
# Data: Emerging Leaders



# Data: Emerging Leaders

Salesforce  
Qualtrics

Avatar  
Qualtrics



# Technology:

## Emerging Leaders



1. Program participant submits assignment in Avatar
2. Facilitator evaluates program participant assignments in Qualtrics; Qualtrics pushes data to Salesforce
3. Analysis on the data is done within Salesforce reports and dashboards



# Technology (1): Avatar



 <b>Baltimore Emerging Leaders (9)</b> Conference for Class Baltimore Emerging Leaders	37
 <b>Bay Area Emerging Leaders (14)</b> Conference for Class Bay Area Emerging Leaders	50
 <b>Charlotte Emerging Leaders Course (28)</b> Conference for Class Charlotte Emerging Leaders Course	12
 <b>Chicago Emerging Leaders Course (23)</b> Conference for Class Chicago Emerging Leaders Course	131
 <b>New Orleans Emerging Leaders (13)</b> Conference for Class New Orleans Emerging Leaders	36
 <b>New York City Emerging Leaders Course (21)</b> Conference for Class New York City Emerging Leaders Course	125
 <b>Newark Emerging Leaders Course (24)</b> Conference for Class Newark Emerging Leaders Course	62
 <b>Prince George's County Emerging Leaders (12)</b> Conference for Class Prince George's County Emerging Leaders	132

# Technology (2): Qualtrics



## SELECTION CRITERIA: BELIEF THAT ALL STUDENTS WILL ACHIEVE COLLEGE SUCCESS (B)

### INDICATORS (B1, B3):

- B1. Belief in all students to be successful in college
- B3. Consistently sets ambitious learning goals for all students

### B1 RATING (Belief in all students to be successful in college)

B1

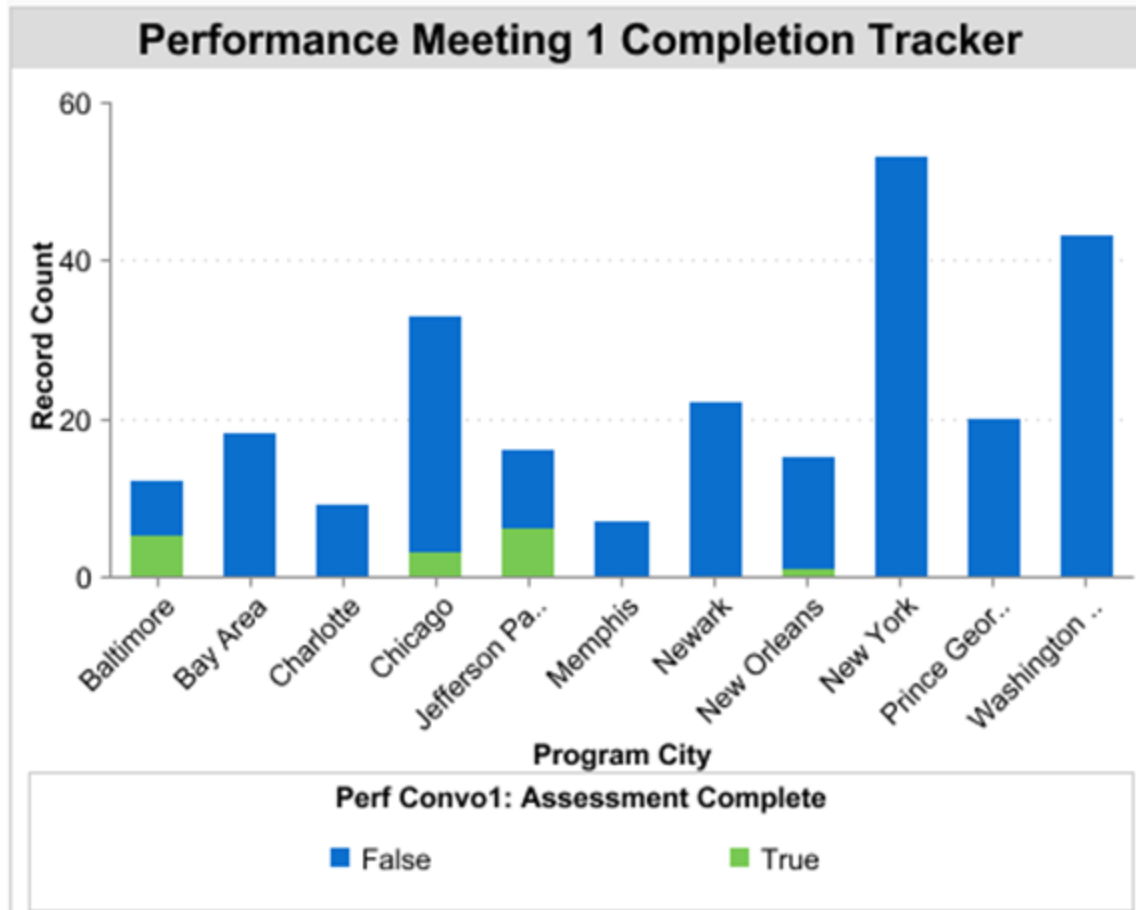
(1) Counterproductive – Negative behavior that reduces performance	(2) Undeveloped – has the awareness of the behavior or related skill, but takes little or no action	(3) Proficient – Attempts to apply but may lack skills to successfully apply in practice	(4) Advanced – Applies skills and strategies effectively
Believes that some students will not learn or achieve academically; may blame students or families	Believes students of all backgrounds can achieve, but does not have high expectations or believe all students will attain success at the collegiate level; accepts the status quo	Believes students of all backgrounds can achieve academically at high levels and attain success at the collegiate level; works toward demonstrating this in practice	Demonstrates the belief that every student, regardless of background, can excel academically at high levels and attain success at the collegiate level

# Technology (3): Salesforce



		Perf Convo1: B Average Score	Perf Convo1: RD Average Score
<input type="checkbox"/>	<b>Program City: Baltimore (5 records)</b>	avg 3.75	avg 3.40
<input type="checkbox"/>	<b>Program City: Chicago (3 records)</b>	avg 3.75	avg 3.50
<input type="checkbox"/>	<b>Program City: Jefferson Parish (6 records)</b>	avg 3.75	avg 3.17
<input type="checkbox"/>	<b>Program City: New Orleans (1 record)</b>	avg 3.75	avg 3.00
<b>Grand Totals (15 records)</b>		<b>avg 3.75</b>	<b>avg 3.30</b>

# Technology (3): Salesforce



# Emerging Leaders: Data Points

- Participant performance in program
  - Scores
  - Peer relativity
  - Trends of dynamic leaders
- Participant impact in schools
- Participant program and Aspiring Principals connections

# Our Impact

## PRINCIPALS HAVE A MULTIPLIER EFFECT

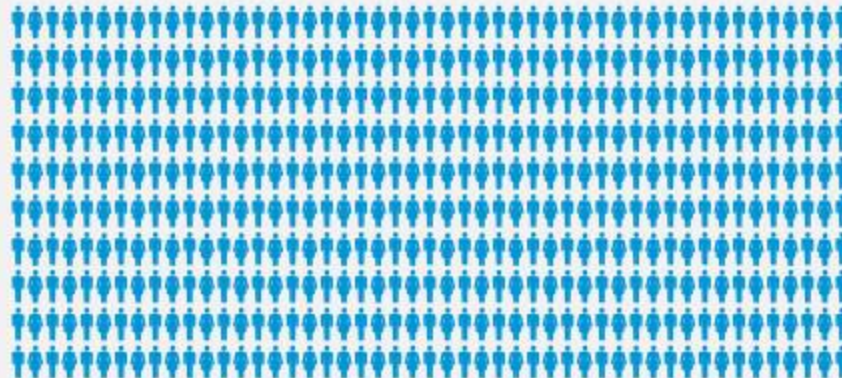
1 Principal



20 Effective Teachers



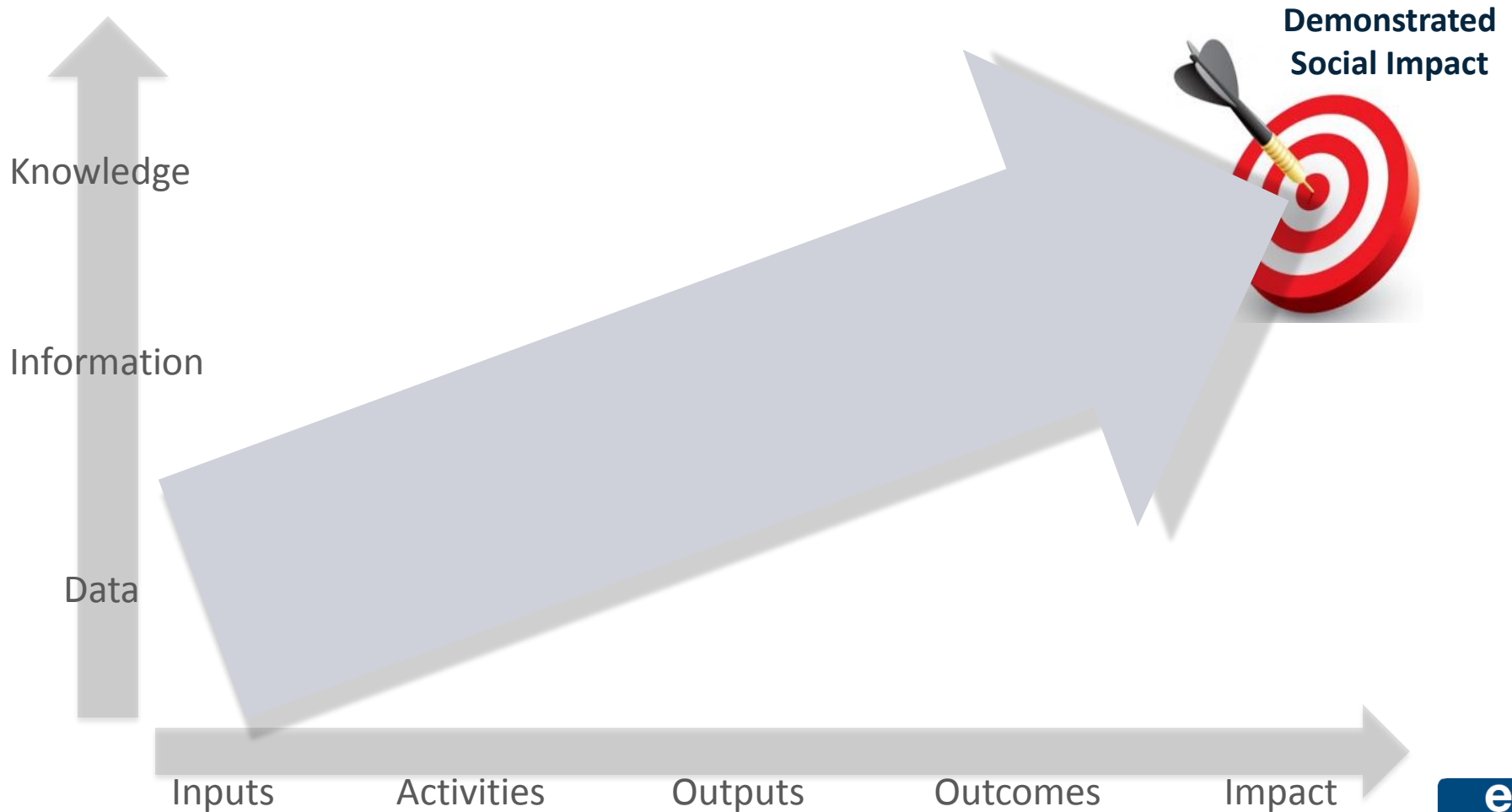
500 Student Successes



Approximate numbers based on national averages

# Summary

# Roadmap to Social Impact



# Q&A

# Contact Us

Rem Hoffmann

*CEO*



Alison Anderson

*Manager of Operations*



Venus Devnani

*National Director of Operations & Business Solutions*



**Any Questions? Email [yvette@exponentpartners.com](mailto:yvette@exponentpartners.com)**

