NNIPCamp Pittsburgh, May 7, 2015

Session 3 – Performance Management for Partners

Led by Jake Cowan

Notes by Katya Abazajian

Present: Sean Capperis, Sarah Coffin, Daniel Epstein, Courtney Denton, Liz Monk, Brett Flodine, Michael Brandt

Notes:

Jake: Explaining the principles of performance measurement, the four goals and their measures. Because have had a lot of conversation about this in the NNIP partnership, want to discuss what organizations are doing, what’s working, what’s not working. The idea is to identify some current practices and other practices.

To Jennifer, what are some of the key performance indicators that Piton is using? Any mistakes that have been discovered?

Jennifer: At first on the radar are communication oriented stats, like hits in terms of the response to some of the intentional outreach. Looking at some of the response around that. Looking at what kind of in person attendance have been seeing whether it's a Piton event or whether they were hosting from a supportive role. So much of the work gets done with partnerships with other organizations, just want to understand what the draw is and what not-too-onerous survey instruments they can deploy.

Have historically operated in Denver proper and starting now in the regional Denver market. Trying to decide which probing questions are appropriate for that user base.

Jake: Piton is defining users and trying to figure out how to think about them. Is anyone else thinking about who the individual users are and defining them?

Brett: How do you tell who the users are?

Jake: Well, what kind of delineations of users do you care about? Do you have defined users that you are targeting or that you expect to use your web site? Then you can think about how to tell if your users are your *intended* users using a variety of techniques.

Michael: New Orleans interrupted every 50th person or so and asked them to take a survey. What question were you looking for on the site? Did you find what you were looking for? A user who is coming for utilitarian purposes is willing to be interrupted, particularly if they think that you could deliver a better answer next time.

David: Cleveland in 2006 instituted a login system and they have log files where they track which user visited, how many hits, etc. Anyone can create an account, but they have that information and the login items.

Jennifer: Piton is trying to figure out what is the carrot is for users to actually create that free user account. They have some features where you can only get certain features by creating the profile. Another option is to get users to save their queries.

Michael: Tend to ask the question from the other side. Why not survey some subset of the nonprofit-serving community and ask them a set of questions around whether they use data intentionally. Org had been offering some workshops on that subject. Are we sensitizing people to using that data? Do you know where to go for that data? Might not be us. A portal will only be to connect people to wherever the best maps are going to be. To the question, ‘have you found that as data gets more accessible, you are making different decisions?’ ultimately one of the ideas had a few years ago is that it would be interesting to compare how different communities provide a data rich environment, In how many cities can a boys and girls club really help them project population change?

Jake: Performance measurement comes out of having identified the goals that you want to achieve. Would business or strategic planning be the place to start creating performance measures?

David: Asked users what they deem as a successful use of the data that they got. In Cleveland, had a user using a lot of property data. Turf is a big issue for them. Came in thinking that a good measure would be how many empty houses they buy, but they were primarily interested in the quality of their decisions. What percentage of the houses they buy is owned by someone else who pays taxes

Michael: One thing that Tom Kingsley asks again and again is give me an example of a way you’ve changed policy. That’s one end of the process of change that is pretty grand. Does an organization become better at what it’s doing because of the decision and tools they developed. Drives an organization to figure out its best strategy? Another question is did the data show you something you did not know? What service did the data provide that couldn’t have been provided elsewhere? If a report serves so many people, would the cost be justified?

Jake: The performance measurement guide focuses on effectiveness and less on efficiency, which is an issue that is not addressed as much on a national level. We “so that” -- the logic model. Then you can actually measure to see whether these things are happening. Are people changing their minds or taking action?

David: One question that helped us is if they had done this process before your work and asking whether the experience/process was different. In some cases, vacancy data would save organization's days of work. Yes, they could have done that work, but maybe they could do that and also do other things or do more of it.

Jake: One goal coming out of this conversation is that efficiency measures are a part of the story that we’re not highlighting in some of the current work. Another is that NNIP needs to focus more on goal-setting/business planning work to enable more performance measurement work.

Jennifer: Question for the room. What kind of requirements do you have for grant work? How does that influence your performance measurement work? How can you enrich the conversations with funders to ensure that there is a continuous development. How can you communicate to funders and the broader community the impact that your work has?

Michael: Did a lot of contingency work by block grant. Intended to do a feedback survey for the feedback loop. People who are building websites, for example, need to deliver a product and see how funders can use that. Need to create new or stronger coalitions around the theme of performance measurement. Need to be in the business of strengthening networks and being a partner in that network. Most of the cross-sites for them meant engaging people for had not been partners before.

Jake: Not all funders are asking larger questions like that “Do you bring other partners to the table.” Also are not asking the Tom Kingsley questions.

David: On your work on influence, do you use or think it’s useful to have some way to scan through public meeting minutes to see if you or your statistics are mentioned?

Jake: Most partners will just set up a google alert for whenever their name comes up. It’s rudimentary but it is the standard.

The business canvas process was the pre-meeting freely available at the Denver meeting where you block out your goals.

**Will send resources out to everyone in meeting notes:**

Here is a list of resources related to the Business Model Canvas.

1. The Business Model Canvas [website](http://businessmodelgeneration.com/canvas/bmc)

2. Two excellent *virtual* BMC tools, [Business Model Fiddle](https://bmfiddle.com/f/#/) and [Canvanizer](https://canvanizer.com/new/business-model-canvas).  *These can enable you and your team to create a canvas together.*

3. Steve Blank's [website](http://steveblank.com/slides/) (serial entrepreneur, author, BMC extraordinaire), where you can find the videos--and many many more--about business model canvassing.

4. An even further simplified version of the BMC, by [Development Impact and You](http://diytoolkit.org/tools/business-model-canvas/). *This could be a great resource to share with colleagues who are unfamiliar with the BMC.*

5. A [website](http://weblog.tetradian.com/2011/07/16/bmcanvas-for-nonprofits/) that describes how to use the BMC in the non-profit world (e.g. some labels are renamed and populated a bit differently)

The framework for performance measurement asks who you want to reach and the business canvas helps you figure that out and map it. Who are the audiences for the work that you do and what are the services that you provide?

Jennifer: It’s a one-pager that boxes out each of the different components. It’s intended to be succinct.

Michael: I found that exercise to be a bit different than other ways we tend to think about strategic planning because it’s based on understanding the stakeholder environment you work in and then asks how do we meet the needs of the stakeholders. Makes you say, ‘we fit here because this group needs a particular function,” makes you measure at least a satisfaction level.

David: There is a McKinsey report on “business” success, and the ones who make correct decisions and incorrect decisions, what are the issues? Between access to data and sound decisionmaking processes, sound decisionmaking processes are the indicators of success because you can troubleshoot because you know when you don’t have enough data. One of the things noticed a lot in work is that businesses use data and approach their problems in very different ways. Working with a property system for example, they are looking for whether the data will talk them out of the decision that they want to do. They haven’t done a broad search, but they just want to know whether they can do what they want. The broader searches are the ones that take into account larger decisions and are often the ones that are more successful.

Jake: Steve Spiker did a performance measurement presentation and he talks about doing the process that you’re talking about and the exploratory process of looking through questions and asked in-depth questions about what it meant. So there’s one guy out there doing it well.

 <http://urbanstrategies.org/documents/ImpactReport2012-2013.pdf>

Talking about next steps. Need feedback -- would say that some external partners still don’t understand the broader outcomes of NNIP work, want to work toward that.

Michael: Still have questions about that -- is the data getting smarter with respect to racial effects, crises in families, etc. beyond the initial goal of democratizing data? There are a lot of people in communities use a lot of data, but don’t respect the data that talks to the issues or refining the data to the right geographies. They don’t really see using the data to allow for a public debate.