Deploying a Common Evaluation Framework

Presented at:
AEA Evaluation 2012
Minneapolis, MN
October 25, 2012

Elliot Ransom
Engagement Manager
Mission Measurement

Elizabeth Brandes
Director, Strategic Solutions
USA Funds

Frank Essien
Access & Outreach Analyst
USA Funds

MISSION MEASUREMENT

USAFunds

Session Overview

Session Title:

Deploying a Common Evaluation Framework Applicable to a Variety of College Access and Success Funding and Program Strategies

Session Objectives:

- Techniques for building organizational support at all levels for insightful and consistent performance evaluation
- Strategies for creating a common evaluation framework that applies to a variety of strategies
- Processes for learning to execute on a shared evaluation plan through collaboration across multiple functions in an organization

© 2012 Mission Measurement, LLC

Session Outline

- Introductions
- USA Funds Situation
- Mission Measurement Approach
- USA Funds Implementation
- Results
- Key Learnings
- Question and Answer

© 2012 Mission Measurement, LLC

Introductions

USA Funds:

Nonprofit corporation that works to enhance postsecondary education preparedness, access and success by providing and supporting financial and other valued services through two main divisions:

1. School and Student Services (Products and services for colleges and universities)
2. Access and Outreach (Philanthropy)

Mission Measurement:

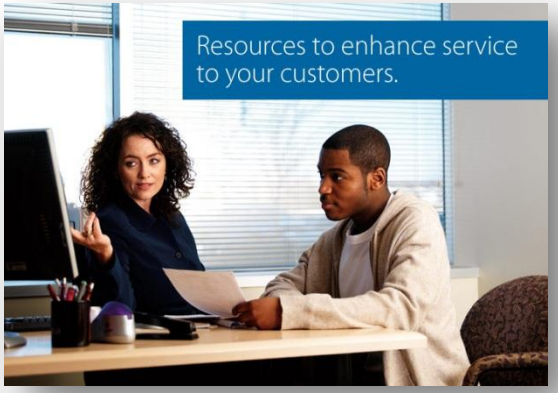
Strategy consulting firm that helps clients to create value through social change; we work with those who are trying to change the world—leading corporations, public sector agencies, nonprofits and foundations—and empower them with data to solve social problems more efficiently.

© 2012 Mission Measurement, LLC

USA Funds Situation
Strategic context for the engagement

USA Funds is undergoing a **strategic shift** in the 'post-FFELP world' to **increase** its **focus** on post-secondary education **readiness**, **enrollment**, **persistence**, and **success**. This will be achieved by maintaining USA Funds' strong commitment to **financial literacy** programs for college students, providing **tools** and **training services** to campus financial aid administrators, and continuing an extensive **grantmaking** program. Additionally, in the 'post-FFELP world', USA Funds is placing a greater emphasis on **understanding** and **measuring** the **outcomes** of its products and services.

Mission Measurement has been engaged to provide Outcomes Measurement and Strategy Consulting services to help further the measurement work of School & Student Services and Access & Outreach.



© 2012 Mission Measurement, LLC

USA Funds Situation
Emerging pressures

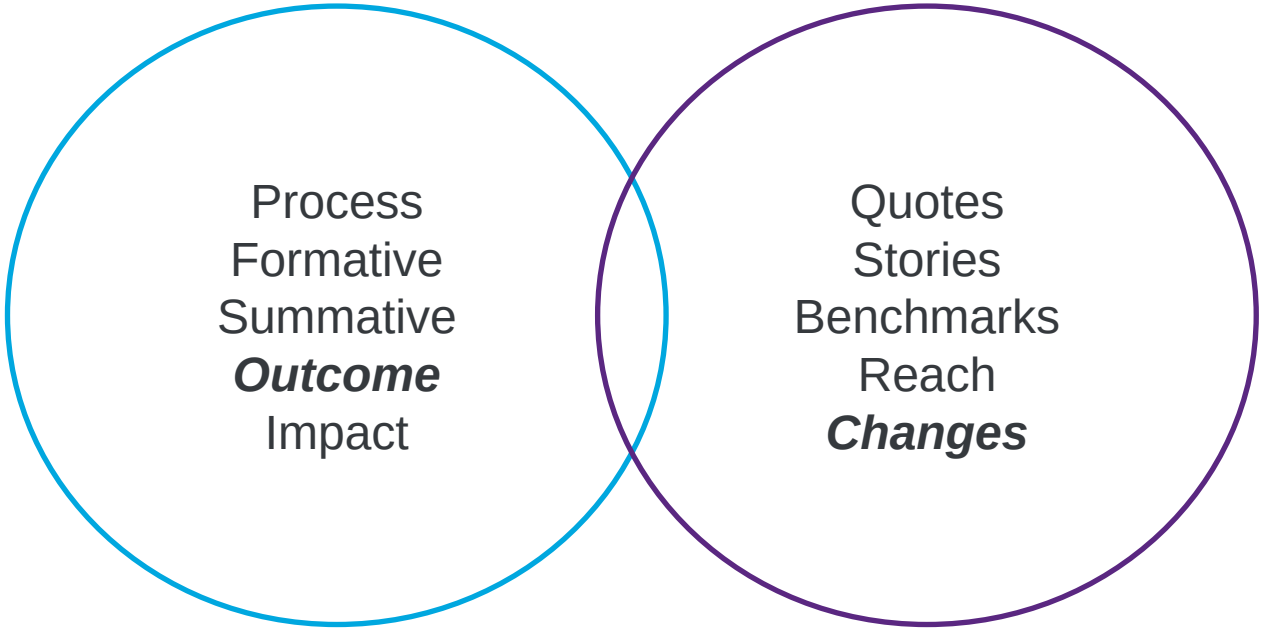
USA Funds faces new pressures as a nonprofit organization:

- Changing and evolving role of funders
- Shift towards an investment orientation in philanthropy
- Increased demand for results
- Opportunities for sustainable value creation or shared value creation

© 2012 Mission Measurement, LLC

USA Funds Situation
Two intentions

Gather important data…



…to make informed decisions

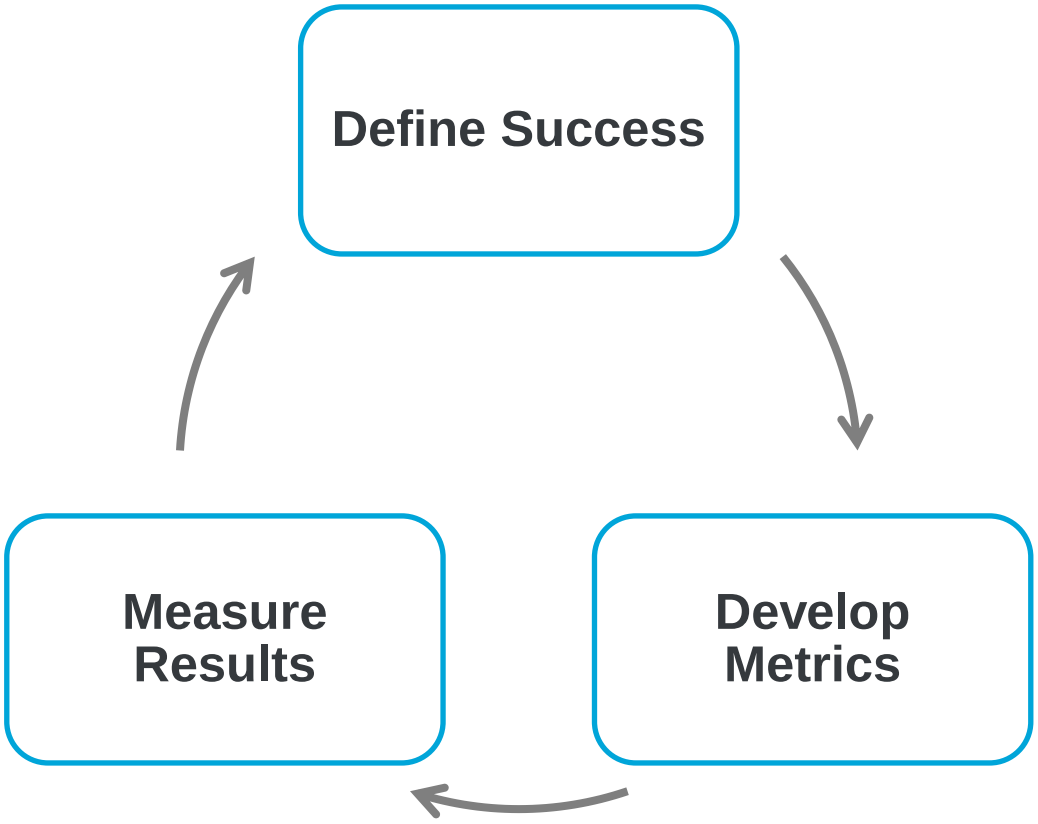
© 2012 Mission Measurement, LLC

USA Funds Situation
Desired insights from measurement

- Determine if investments made were worthwhile
- Illustrate good stewardship of resources
- Build credibility with stakeholders
- Maximize actions to reach strategic goals
- Demonstrate contribution to social good

© 2012 Mission Measurement, LLC

Mission Measurement Approach
Building organizational support



© 2012 Mission Measurement, LLC

Mission Measurement Approach

Creating a common framework

Corporate Impact: Increase economic and social opportunity for disadvantaged students through enhancing attainment of post-secondary education goals

Postsecondary Readiness and Enrollment	Postsecondary Persistence and Success	Utilization of Best Practices at Participating Institutions
Outcomes	**Outcomes**	**Outcomes**
Outcome Statement	Outcome Statement	Outcome Statement
Outcome Statement	Outcome Statement	Outcome Statement
Outcome Statement	Outcome Statement	Outcome Statement

Longer term

Shorter term

Products, Services & Grants

© 2012 Mission Measurement, LLC

Mission Measurement Approach
Creating a common framework

	Access & Outreach		School and Student Services			
Shared Outcomes	**Product**	**Product**	**Product**	**Product**	**Product**	**Product**
Postsecondary Readiness and Enrollment						
Outcome Statement	●	●				
Outcome Statement	●	●				
Outcome Statement	●	●				
Postsecondary Persistence and Success						
Outcome Statement				●		
Utilization of Best Practices at Participating Institutions						
Outcome Statement			●		●	●

© 2012 Mission Measurement, LLC

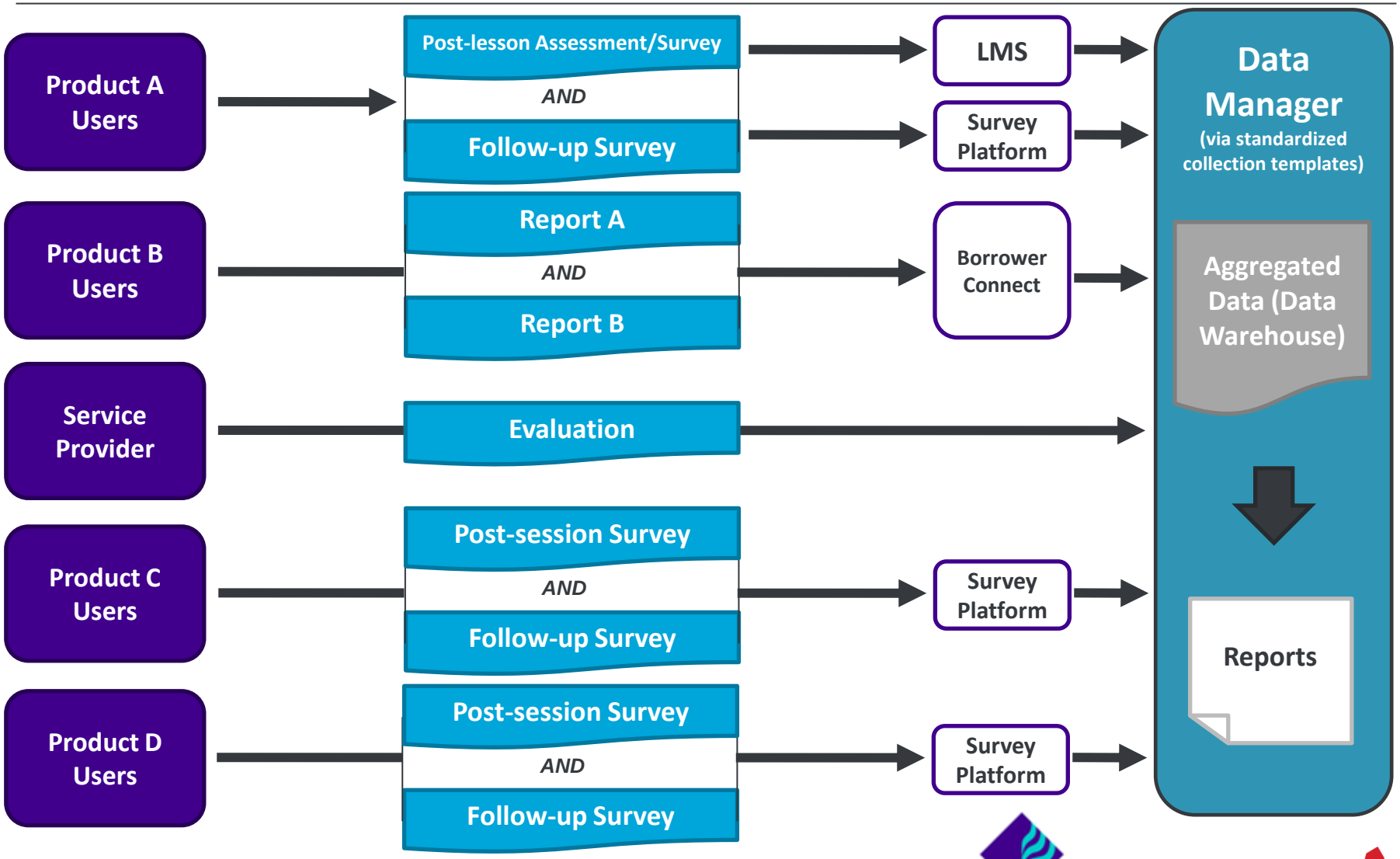
Mission Measurement Approach
Creating a common framework

Postsecondary Readiness and Enrollment		
Outcome	**Metric**	**Data Source**
Outcome Statement	• Metric A	• Report A and/or • Report B
	• Metric B	
	• Metric C	
Outcome Statement	• Metric D	• Report A

© 2012 Mission Measurement, LLC

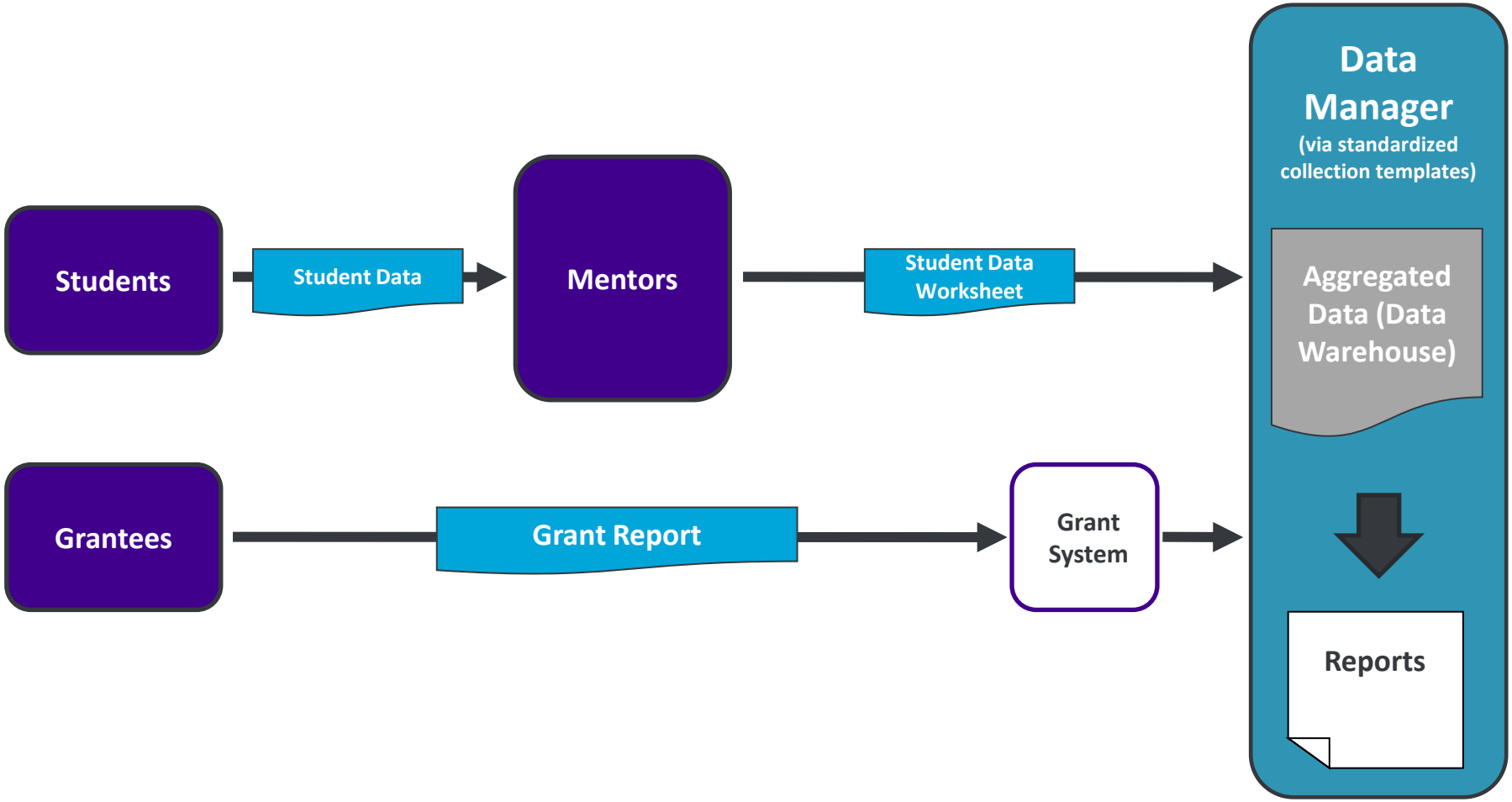
Mission Measurement Approach

Learning to execute



© 2012 Mission Measurement, LLC

Mission Measurement Approach
Learning to execute



© 2012 Mission Measurement, LLC

Illustrative

Mission Measurement Approach
Learning to execute

Product A Post-lesson Assessment/Survey			
Owner:	Product manager	**Format:**	LMS Report
Status:	Complete	**Frequency:**	Monthly
Flow:	Student → LMS → Product A Outcomes Data Collection template	**Timing:**	Administered: Immediately after lesson is completed Data put into Excel template and submitted: 5th business day of each month

Applicable Outcome	Data Collected
Outcome Statement	• Metric 1
	• Metric 2
	• Metric 3

Process Steps:

1. Students complete post-lesson assessment and survey
2. Data from assessment and survey is captured and stored in the LMS
3. On the 5th business day of each month, reports are run in the LMS…
4. …
5. …
6. …

© 2012 Mission Measurement, LLC

USAFunds

MISSION MEASUREMENT

Illustrative

Mission Measurement Approach
Learning to execute

USA Funds
Product A Outcomes Data Collection Template

Outcomes	Metrics	October #	October %	November #	November %	December #	December %	Q1 Results #	Q1 Results %	Q2 Results #	Q2 Results %	Q3 Results #	Q3 Results %	Q4 Results #	Q4 Results %	Annual Results #	Annual Results %	Annual Targets #	Annual Targets %
School and Student Services																			
Product A																			
Short Term Outcomes																			
Outcome Statement	Metric																		
	Metric																		
	Metric																		
	Metric																		
	Metric																		
Long Term Outcomes																			
Outcome Statement	Metric																		
	Metric																		

Outcomes Data Collection Template

© 2012 Mission Measurement, LLC

USA Funds Implementation
Moving from concept to practice

School & Student Services

- Identify data sources and create data collection tools
- Develop a process and schedule for data collection and reporting
- Determine metrics and the measurement process
- Involve product managers throughout the process to create buy-in
- Regular progress monitoring

Access & Outreach

- Identifying metrics and data sources
- De-mystifying evaluation (i.e., internal training sessions for staff)
- Using a set of consistent evaluation terms
- Allow a role for both external and internal evaluation
- Involving program officers in refining the metric to create buy-in

© 2012 Mission Measurement, LLC

USA Funds Implementation
Challenges

School & Student Services

- New terminology
- Managing multiple data sources
- Non-existent data collection tools
- Automation

Access & Outreach

- Created more work (i.e., follow-up with grantees to clarify their data)
- Difficulty transitioning some grantees from qualitative to qualitative AND quantitative data
- Educating grantees on evaluation terms

© 2012 Mission Measurement, LLC

USA Funds Implementation
Why it "sticks"

- Management commitment
- Employees have ownership in a process they helped develop
- Yields better and more useful information

© 2012 Mission Measurement, LLC

Results
School and Student Services

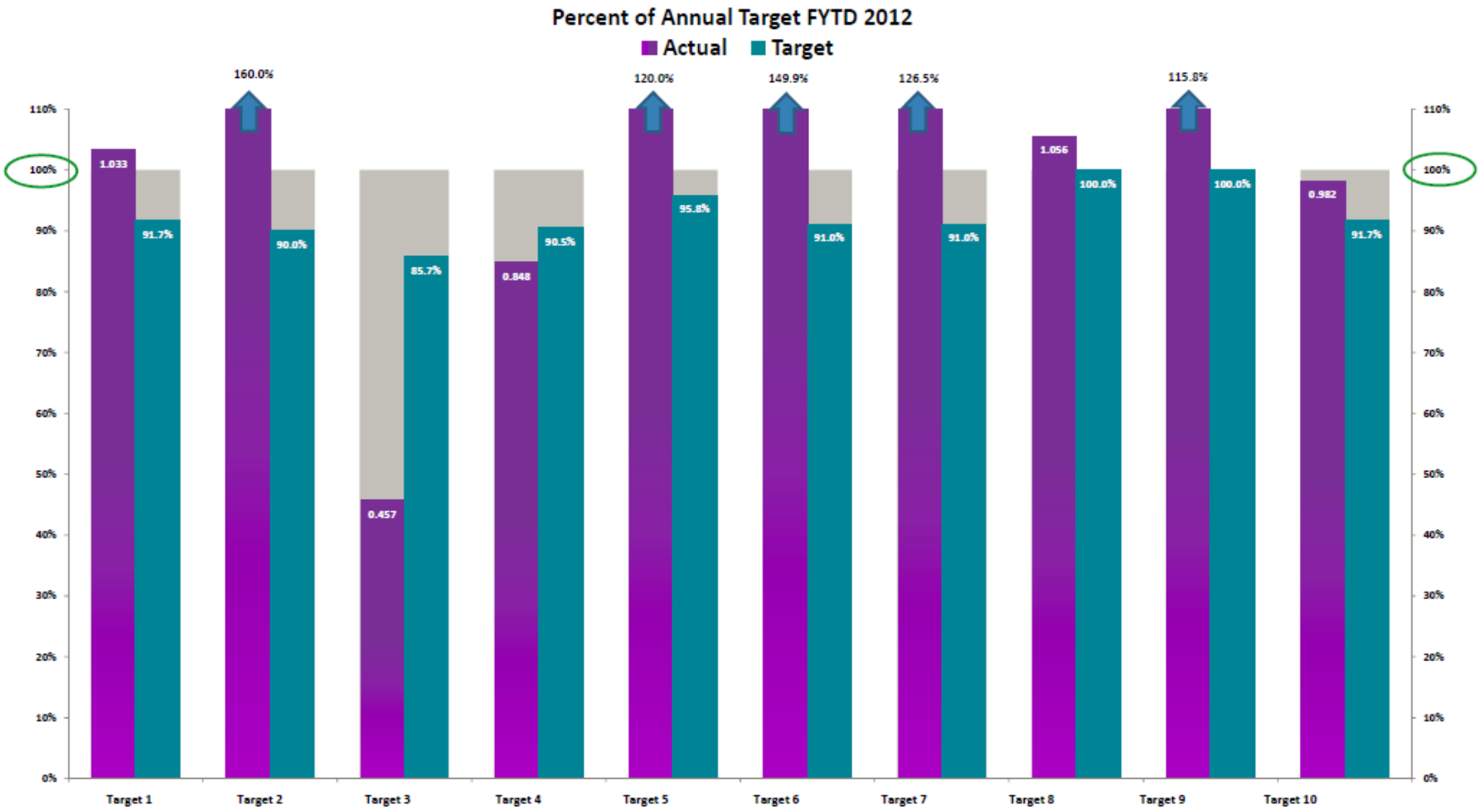
What has changed?

- Tracking usage and results (tangible and intangible benefits)
- Endowment to support institutions with great need and few resources
- Offering products and services that are effective and provide needed solutions for colleges and universities
- More informed, data-driven decisions
- Clearer focus on mission to increase graduation/completion rates and decrease student loan defaults

© 2012 Mission Measurement, LLC

Results

Sample School and Student Services Dashboard



© 2012 Mission Measurement, LLC

Results
Access and Outreach

What has changed?

- Making data-driven funding decisions
- Will be able to show outcome-based impact as a result of our grant funding
- More internal and external funding collaboration
- Organizational learning from data
- Continuous improvement in our funding strategy
- Focusing more on our targeted population (e.g., low income, students of color, first generation)
- Presenting qualitative and quantitative impact

© 2012 Mission Measurement, LLC

Results

Sample Access and Outreach Dashboard

USA Funds

Access & Outreach Outcomes Dashboard

FY 2012 - Quarter 4

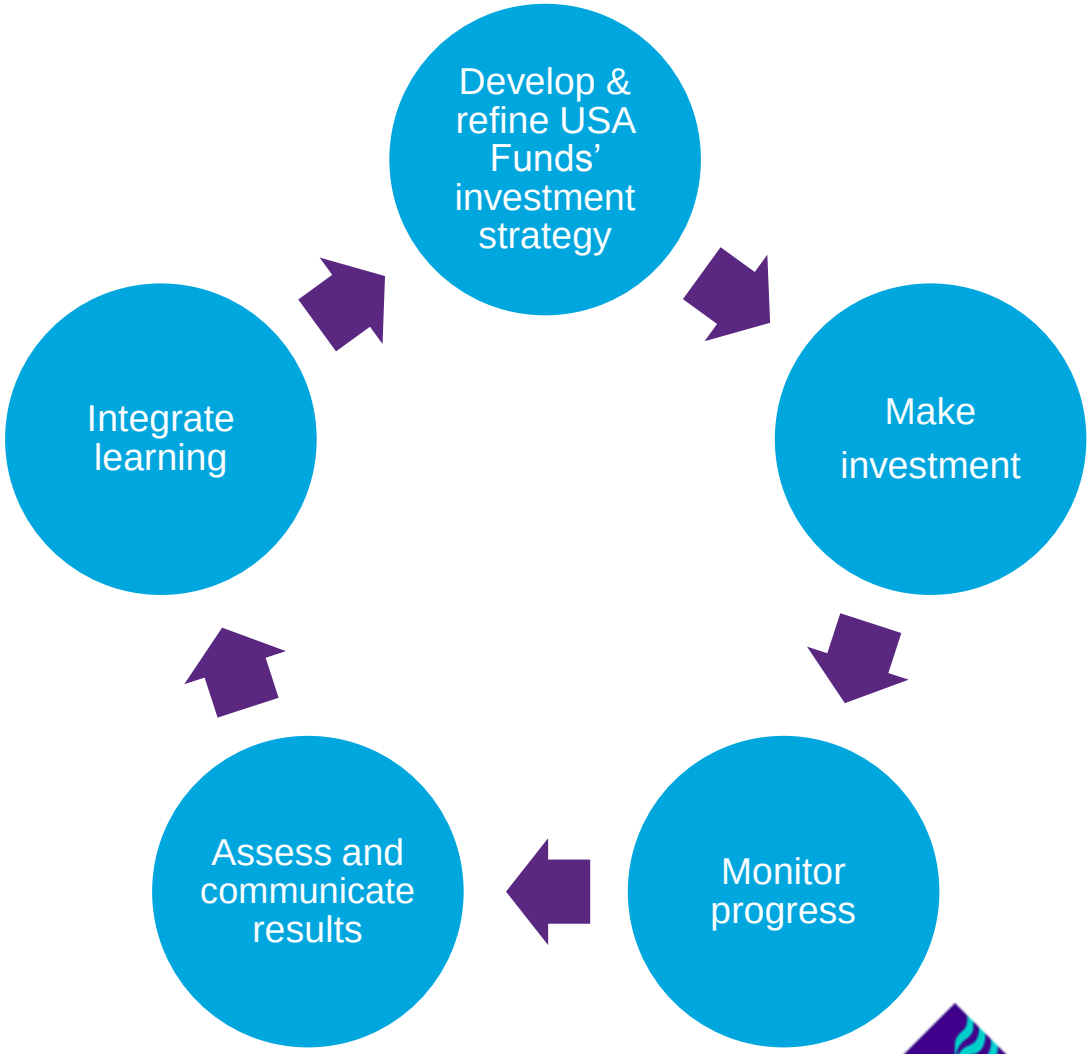
Service	*105 students*		
Metrics	Readiness	Enrollment	National Average
Metric	97%		
Metric	90%		
Metric	100%		
Metric	82%		
Metric		98%	
Metric		94%	
Metric		FY13 Q1	68.1%***

****2010 U.S. Bureau of Labor Statistics*

© 2012 Mission Measurement, LLC

Key Learnings

Not a one-time event, but a dynamic learning process

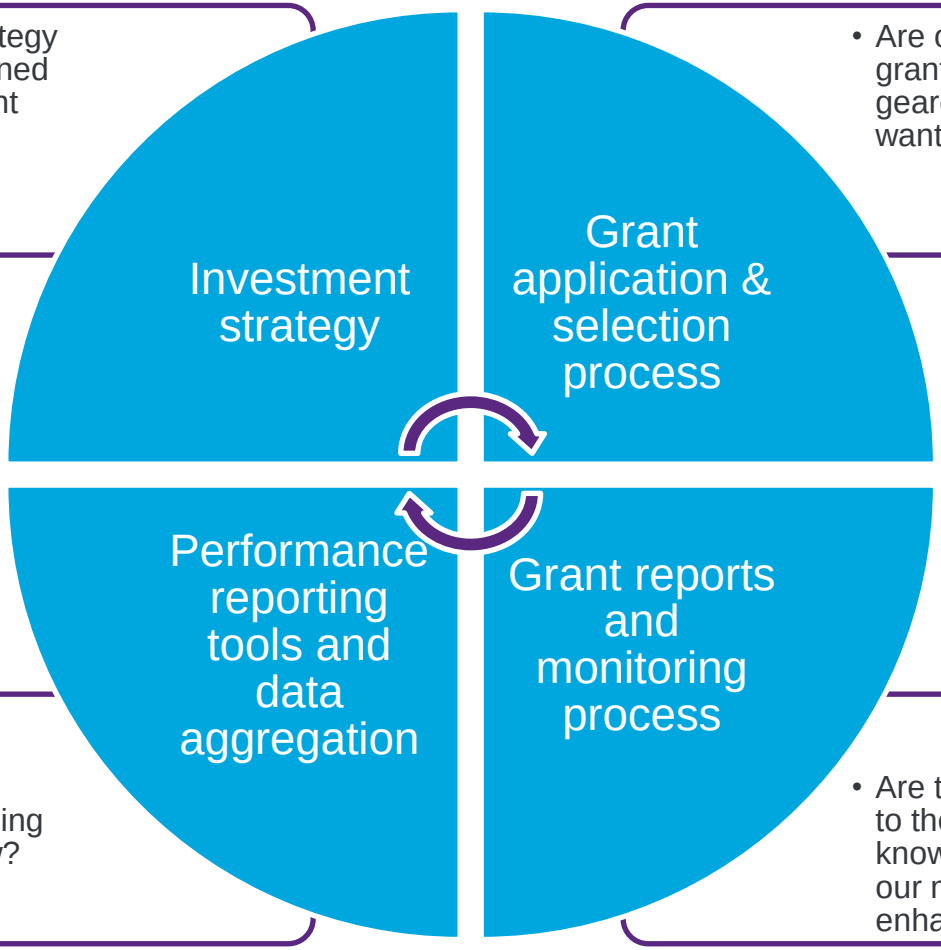


© 2012 Mission Measurement, LLC

Key Learnings
Incorporating the lessons learned

- Does our investment strategy reflect what we have learned from our most recent grant cycle?

- Are our grant applications and grantee selection process geared toward the results we want to achieve?



- Are our performance monitoring tools showcasing the data we want to know?

- Are the grant reports speaking to the results we want to know? Do we need to adjust our monitoring process to enhance results?

© 2012 Mission Measurement, LLC

Session Objectives

- Techniques for building organizational support at all levels for insightful and consistent performance evaluation
- Strategies for creating a common evaluation framework that applies to a variety of strategies
- Processes for learning to execute on a shared evaluation plan through collaboration across multiple functions in an organization

© 2012 Mission Measurement, LLC

Question and Answer

Q & A

© 2012 Mission Measurement, LLC

Thank You!

Thank You!

Elizabeth Brandes
Director, Strategic Solutions
USA Funds
Elizabeth.Brandes@usafunds.org

Frank Essien
Access & Outreach Analyst
USA Funds
Frank.Essien@usafunds.org

Elliot Ransom
Engagement Manager
Mission Measurement
eransom@missionmeasurement.com

© 2012 Mission Measurement, LLC