

Success Measures Project Streamlining Evaluation

Success Measures is a collaboratively developed set of tools intended to minimize the effort, resources, and in-house skills that organizations need in order to conduct effective outcome measurement. Early implementation experiences across more than 90 organizations have yielded a variety of programmatic improvements, greater community engagement, more strategic thinking at the organizational level, and more sophisticated outcomes conversations between funders and grantees.

Success Measures was an idea of the Development Leadership Network (DLN) – a community economic development practitioner’s network for sharing best practices, looking at trends and emerging issues in the field, and providing peer support. In the mid-90s, a number of leaders in the field, Executive Directors of leading Community Development Corporations (CDCs), became concerned that if they, as a field, did not step forward to effectively take on the challenge of evaluation, funders and others would surely do so. Maggie Grieve, Director of Success Measures recalls, *“these leaders were concerned that, as a field, we weren’t doing what we could to generate learning and take ownership for evaluation. The group was intensely interested in accountability - they really wanted to know whether they were meeting their missions and having a positive impact within their communities. DLN initiated a small project and approached foundations focused on community development, such as F.B. Heron, Annie E. Casey, Ford, MacArthur, and others for support. Ultimately, nine regional working groups were established that these and other funders contributed to or convened.”*

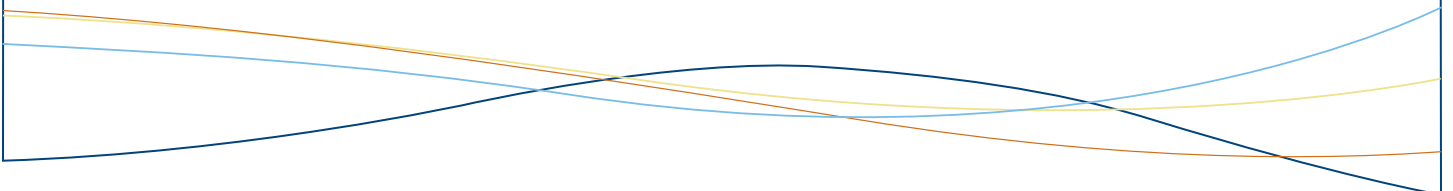
The approach and indicators were developed in a collaborative way by over 300 practitioners, organizations, and researchers, and were tested with over 50 community-based organizations. Mary Jo Mullan, Vice President of Programs at the F.B. Heron Foundation, has been a long-time funder of the project. She recalls *“this was foundation-funded, but practitioner-driven.”* As a funder, Heron was interested in the potential for management tools that would help organizations conduct practical, meaningful assessments of their work – aiming for continuous improvement rather than a one-time study.

Practically speaking, the early development took place in two phases of dialogue, followed by a pilot process that worked on implementation with 50 different organizations. In a first round of conversations, the group determined that a participatory evaluation approach was the best fit – processes that engaged the communities being served in the measurement process. A second phase, engaging over 200 individuals, focused on the question: *“If we’re all in the same field, what menu of indicators can we collectively draw from?”* From this conversation, a set of 44 indicators was defined in the areas of affordable housing, economic development, and community building.

In the pilot process, DLN and the McAuley Institute partnered to test the Success Measures approach in a preliminary way with 50 different community development organizations by building out the tools and working with local researchers. After field testing, Grieve reports, *“groups felt that it was very useful, but they also said that they weren’t in the data-collection, research tool business. We heard ‘it’s really helpful to have the data, but I need to have staff doing something other than arraying qualitative data in an Access database.’ They wanted to find a way to collect and use the data and needed additional help in building the tools. Additionally, it was important that the*

Success Measures at NeighborWorks® America

- The Success Measures Project was initiated in 1997 by Development Leadership Network and jointly conducted with McAuley Institute from 1999-2004. Transitioned to NeighborWorks® America in 2004 to serve community development field and related funding partners.
- Number of Success Measures staff: 6
- NeighborWorks® America supports a network of over 230 community development organizations, created by U.S. Congress
- Based in Washington, DC
- Provides financial support, technical assistance and training in the areas of affordable housing, economic development, and community building



evaluation process was taking things that were available and adapting them to a community development context. Not starting from scratch was an important value.”

In response to practitioners' needs, a range of over 100 data collection tools was created, corresponding to the 44 different indicators. A Web-based data system was created to avoid technology barriers. The result is Success Measures Data System (SMDS), which allows users to conduct evaluations by providing outcome indicators, over 100 tested qualitative and quantitative data collection instruments available in English and Spanish to measure the indicators, a reporting function to tabulate data, and a secure place for organizations to enter and manage their data. Users gain access to the Web-based system's tools for a \$2,500 annual subscription fee. Enhanced subscription levels with additional functions that allow users to create, post, and share new sets of indicators are also offered.

In 2004, NeighborWorks® America assumed responsibility for Success Measures and its implementation in the community development field. In partnership with NeighborWorks, Success Measures has expanded to offer an integrated package, combining training and technical assistance with the Web-based SMDS. This training and technical assistance package, at a one-time cost of \$7,500 per organization, ensures that organizations have the support that they need to integrate outcome evaluation into their programs and organizational cycles. Eight different funders or intermediary partners make the tools available to their affiliates or grantees. 90 organizations have used the tools, with 15 more in the process of adopting the tools. Grieve reports that adoption is gradual as organizations learn how to use the tools themselves: *“Most people prioritize to have a manageable evaluation system, starting with 3-5 measures. Then they go out and bring back tabulated data, and then learn how to use it in analysis. Success Measures provides six days of coaching plus onsite training, and subscriptions to the data system. Some parts of the system are customized for individual funders or intermediaries, including the ability to adapt some of the indicators.”*

SMDS works to balance rigor, flexibility, and standardization. Brooke Finn is Director of Program Integration and Planning for NeighborWorks America, and has overseen the pilot of SMDS among NeighborWorks affiliate organizations. She notes that *“not all NeighborWorks member organizations are of similar size, orientation, or line of business. We could not presume that one standard would work for all grantees or affiliates. So Success Measures has a good core menu of community measures – robust, but allowing the flexibility to build your own outcome measures.”* In every location, Success Measures provides the structure to choose either standard or custom indicators, giving each organization the opportunity to consult local stakeholders about their choices. In the field, Finn reports, *“some organizations saw the process as an opportunity to bring people back to the table, or to bring new people into the conversation about community change. For these organizations, the process of engaging stakeholders in reflection was in and of itself sufficient value from the evaluation process because of how it reenergized people about the work.”*

Because use varies, the type of value created by the SMDS tools also varies. For many organizations, Finn notes that the first step is creating a benefits picture, *“having the discipline of sitting down and hammering out a shared understanding across stakeholders.”* Organizations are walking away with a picture that can be used in a variety of different ways. The tools then adopted are different; so are the ways in which findings can be used to advance programs.

Finn has many stories to share. *“For one organization, their next step was measuring residents' perceptions of safety and security in the neighborhood; they found that people weren't comfortable having kids outside on their own. They leveraged those findings with the local government to get resources for a new community center. When the government official said ‘the first thing you need to do is survey your residents,’ they were able to leap across that hurdle almost instantly.”* For another organization that manages rental properties, *“they assessed the quality of housing in addition to safety and security and noted a few properties that were lagging. They will now pay more attention to those places... These kinds of findings provide the feedback that can strengthen, change, or redirect programs.”*

Success Measures Data System

- The Success Measures Data System (SMDS) is an outcome-based evaluation module for conducting full-scale participatory evaluations of programs to improve neighborhoods and communities. It provides everything needed, from start-to-finish, to do credible, useful evaluation, including:
- Step-by-step instructions on how to design and complete a participatory outcome-based evaluation
- Community development outcome indicators
- Data collection instruments for all indicators such as surveys, interview guides, and forms for tracking administrative and other records
- Directions and helpful tips on how to best use each data collection instrument
- A secure place for you to enter, manage and store all the data collected for an evaluation
- A reporting function that tabulates your data
- Guidance on how to integrate your learning into programs and advocacy

Source: www.successmeasures.org

For NeighborWorks, a funder of many of the new SMDS users, the new evaluation approach and tool is not about benchmarking funded

organizations, but about understanding progress and improving programs. It also has implications for NeighborWorks itself. Finn remarks, *"I think this raises the bar for NeighborWorks, as much as or more than it does for our affiliated organizations, about how we really support them. We can have a more sophisticated conversation, beyond talking about numbers of housing units. How do we help organizations do more strategic thinking that gets the best possible results? Ultimately, that's what we want to do, hold ourselves accountable for the collective impact over time at the community level."*

NeighborWorks organizations are not the only current users of Success Measures. The Wachovia Regional Foundation sponsors its grantees' use of Success Measures to help funded organizations improve their practice while also providing the Foundation with better data on how grantees are performing. Success Measures has been used successfully with a pilot group of Wachovia grantees, and the Foundation plans to expand its use among grantees even further due to the high degree of satisfaction. Lois Greco, Evaluation Officer at the Wachovia Regional Foundation, notes that grantees find the tools valuable, but can struggle with how to best integrate them into the daily work of the organization. *"Every grantee I have asked has said it's a valuable tool. They believe in it, but what they are struggling with is taking the time to really integrate it. Because it is so comprehensive, it can be overwhelming."* To help address this, SMDS provides on-site coaching to members as well as initial training workshops, which the Wachovia Regional Foundation has used. *"Having Coaches do a site visit for each project is so valuable. Even just having a conversation about outcomes measurement is valuable. The approach also allows staff to customize the evaluation plan accordingly and the staff really start to buy in and understand why this is needed and what it's for."*

As Greco points out, the most valuable aspect of the tool is its ability to provide common outcomes and indicators. *"Across similar organizations in different geographies, we're able to develop a consistent key so that we can make some comparisons, which helps us make better decisions."*

