“Data-Driven” but who is in the Driver’s Seat? 
Building & Sustaining Organizational Data Capacity

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Agenda

- Introductions & Rationale (2:40-2:55)
- Case Study (2:55-3:20)
- Small Group Discussion (3:20-3:40)
- Large Group Debrief (3:40-4:10)
- We will email discussion findings to group (please sign in!) and post to AEA library following the conference.
Rationale

- Public & private expectations of evidence-based practice
- Drowning in data vs. data scarcity
- Balancing reporting demands with organizational goals
- Building & sustaining data capacity with resource constraints
Case Study

- Creation & growth of internal Research & Evaluation Department at large education nonprofit
- Leadership’s recognition of need for increased rigor in evaluating programs
- Phase 1: Formalizing department (Hilary: 2010-2012)
- Phase 2: Data efficiency (Kelly: 2011-2013)
- Phase 3: Rigor of evidence (Jeff: 2013)

Discussion points:
- Context
- Goals
- Strategies
- Principles & Lessons Learned
Phase 1: Formalizing Department Context

- CSF provides continuum of supports to low-income, first generation college students in Washington and the District of Columbia since 2000
- Bridgespan Group study 2008, recommended creating Research and Evaluation Department
- 2008-2011 Department is staffed by one Director of Research and Evaluation (R & E)
  - 2009-10 Program staff member transitioned to role after supporting administration of Washington State Achievers and other scholarships
  - 2010-2012 Hilary Loeb joined CSF, bringing background in mixed inquiry methods, data systems development and policy analysis
Phase 1: Formalizing Department Context

- Director of R & E wears multiple hats
  - Evaluation designer
  - Grant writer
  - Liaison to external evaluations
  - Trainer
  - Close collaborator with information technology team
  - Launching learning communities

Phase 1: Formalizing Department Goals and Strategies

- Cultivating reputation as data authority
  - Data request process
  - Databook
  - Staff training
  - Alignment with IT team
  - Use of Leadership Team meetings to communicate department milestones
Phase 1: Formalizing Department Goals and Strategies

- Developing strong, trusting relationships inside and outside organization
  - Participatory processes in internal and external evaluation planning
  - Brokering access to staff and students in external studies
  - Close collaboration with state agencies and school districts
  - Alignment with Development, Marketing and Finance Departments
Phase 1: Formalizing Department Principles and Lessons Learned

- Documentation is critical in fast paced work
- Data visualization and clarity in communication foster learning
- Humor and playfulness help build credibility
- Managing up helps ensure success of new initiatives
- Renewal and reflection infuse work with purpose
Phase 2: Data Efficiency

Context

- Role of Research & Evaluation Analyst
- R&E data authority & trust established
- High and broad demand for “data”
- Need for greater efficiencies, as well as new reports

<table>
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<th>Data Request Form Tracking on SharePoint</th>
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<tr>
<td>Role of Research &amp; Evaluation Analyst</td>
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<td>High and broad demand for “data”</td>
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Phase 2: Data Efficiency
Goals & Strategies

- **Goals**
  - Strengthen Data Efficiency, Consistency & Transparency
  - Increase Responsiveness
  - Promote Data Use

- **Strategies**
  - Data Alignment & Formatting
  - Data Integration & Visualization
  - Data Collection Methods
Phase 2: Data Efficiency
Goals & Strategies

Data Alignment & Formatting:

- Data Book: From Excel to PDF with hyperlinks, branded for printing
- Data Book & Factsheets: Updated at same time & uploaded to SharePoint
- Trainings with each census
- University factsheet macros built by IT

CSF Data Book: Official Statistics – May 2013

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US Bachelor’s Degree Attainment Rate for All 24-year olds, By Income Quarte


Analysis File: PSEOE_BachelorDegreebyIncomeQuartile.csv. As of 8/10 in new data available from PSEOE.

CSF Data Book, Cenoma 5/13, p. 79
Phase 2: Data Efficiency
Goals & Strategies

Data Integration & Visualization:

- Data Warehouse: student records, financial disbursements & NSC
- Tableau graphics
- Custom Databases with Excel Slicers on SharePoint
- Standardized & branded reports
Phase 2: Data Efficiency
Goals & Strategies

Data Collection

Methods:

- Paper survey option for school-based assessments & events
- Remark® survey scanning software
Phase 2: Data Efficiency
Principles & Lessons Learned

- Consistency, transparency & responsiveness increase buy-in & demand for data (of all kinds)
- Day-to-day demands for output data & ad hoc data requests quickly can become all-consuming
- Value of processes, timelines, clear expectations & follow-up to be sustainable (e.g., R&E Project calendar, Remark® training guide, emphasize Data Request form)
- Continual opportunity to develop deeper, more sophisticated understanding of data value & costs (Phase 2 to Phase 3)
Phase 3: Increasing Rigor of Evidence

Context (current)

- Momentum of previous evaluation capacity building work evident
- Tangible organizational appetite for data
- Ever-increasing data efficiencies and opportunities being created by IT and the Data Warehouse apparent

However:

- Organizational language and measurement legacy rooted in performance monitoring: goals, objectives, outputs
- Current measurement and data systems not as well-aligned to address questions of program impact
Phase 3: Increasing Rigor of Evidence Goals

- “The number one organizational research need moving forward is to produce rigorous evidence on the impact and effectiveness of CSF’s programmatic approach, constantly seeking to improve its strategy as it scales its impact.”
  - Promote a deliberate expansion of R & E functions, moving beyond performance monitoring and increasing the value add to the Foundation
  - Move beyond measurement of outputs (the “what”) toward measurement of outcomes (the “so what”)
  - Align programmatic activities to Foundation level outcomes to allow for examination of impact at both the program level as well as at the Foundation level
Phase 3: Increasing Rigor of Evidence Strategies (Part I)

- Vet intended shift/growth with senior leadership to gain endorsement of changes needed and level of effort required
- Present to staff early in process to put forthcoming changes in context, with an emphasis on understanding need and value add
- Explicit collaboration with IT to sync with their ongoing agile development process
Phase 3: Increasing Rigor of Evidence Strategies (Part II)

- Series of working meetings with 11 program teams over the summer, focused on:
  1. Constructing/updating program logic models,
  2. Defining primary program activities and linking each to Foundation level outcomes,
  3. Reviewing current measurement strengths and deficiencies, and
  4. Discussing future measurement opportunities

- Synthesis of findings/prioritization of needs/recommendations presented to senior leadership for endorsement, then to teams for feasibility

- Formal organization level evaluation plan that balances data needs/capacity:
  - Operational data needed for performance monitoring (largely output oriented; moving toward annual census data environment for external facing, automated/real-time data systems for program teams; largely managed by IT)
  - Outcome data needed to measure program and Foundation level outcomes largely to be designed and implemented by R & E
Phase 3: Rigor of Evidence
Principles & Lessons Learned

- The conceptual shift from measuring the “what” to measuring the “so what” should not be underestimated
  - While this shift is large, it often really resonates with program staff
- Legacy language, concepts, processes can create confusion, and therefore need to be addressed, but in a manner that doesn’t feel like a threat to previous growth
- Embracing the concept of “owning our own interests” is difficult when data demands are historically dictated by funder
  - High levels of intentionality across 12+ program supports and services, yet very little intentionality in terms of measurement
- Data rich can sometimes still = information poor
  - Data capacity may be better viewed as a utility measure, rather than a volume measure
Phases of Building Data Capacity

- **Formalizing Department**: Adopt processes & trust the department.
- **Data Efficiency**: Give up control of numbers.
- **Rigor of Evidence**: Shift mindset from performance monitoring to measuring impact.
Group Discussion

1. What does a high level of data capacity look like?
2. What strategies can evaluators use to lead organizations to create data systems that can balance reporting demands with organizational goals?
3. What general principles or practices support building data capacity?
Thank you!

- We will email discussion findings to group (please sign in!) and post to AEA library following the conference.
- Kelly Bay-Meyer, Senior Research & Evaluation Analyst, College Success Foundation (kbay@collegesuccessfoundation.org)
- Hilary Loeb, Director, Puget Sound Coalition for College and Career Readiness and Road Map Support, Puget Sound Educational Service District (hloeb@pseSD.org)
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