

Spring 2011

# Chenango United Way Community Partners' Performance Measurement Data: Utilization, Challenges, and Practices

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Chenango United Way Community Partners' Performance Measurement Data: Utilization,  
Challenges, and Practices

By

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BA, State University of New York at New Paltz, 2006

CAPSTONE PROJECT

Submitted in partial fulfillment of the requirements for  
the degree of Masters in Public Administration in the Graduate School of  
Binghamton University  
State University of New York  
2011



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2011

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## **Executive Summary**

The following study focuses on Chenango United Way community partners' utilization of data from performance measurements. It answers two research questions: 1) what the Chenango United Way community partners are doing with the data they collect from their program outcome measurements and 2) how the Chenango United Way can help community partners utilize the data collected from their program outcome measurements to improve programs.

Data for this study was collected from two populations including community partner directors and United Way chapter administrators who were interviewed about their performance measurement practices. Based on an analysis of the data, the study presents the following findings: 1) community partner organizations are utilizing their data to be accountable, develop performance measures, make decisions, and secure future funding; 2) community partner organizations find the logic model, community needs assessment, and technical assistance provided by the Chenango United Way useful; 3) community partner organizations find developing measurable outcomes challenging; and 4) blueprints/methodology plans are a current trend within United Way and government agencies that may be of use to organizations who struggle with measurable outcomes.

Based on these findings, the study presents five recommendations including that the Chenango United Way: 1) collect information from community partners about data utilization by including a question in the RFP that asks organizations how they use data from performance measurements; 2) communicate with early adopter chapter administrators that have blueprints; 3) provide community partner organizations with additional training about developing measurable outcomes; 4) allow community partners to use performance measurements that are

most useful to them for program improvement; and 5) continue practices identified as useful to community partners and develop an annual survey to stay connect to partners about practices they like and dislike.

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**Problem Statement**

In 2005, the Chenango United Way (CUW) shifted its granting process. It transitioned from an organization that awarded grants based solely on financial need to one that focuses on program outcome measurements. According to Chenango United Way Director Elizabeth Monaco, since then, the organization has required all of its community partners to report these measures (personal communication, November 9, 2010). This transition came after United Way of America spent close to \$2.4 million between 1995 and 2000 to encourage local United Way organizations to improve results and adopt these performance practices (Hendricks, Plantz, & Pritchard, 2008, p. 15). Today, The Chenango United Way is one of approximately 450 United Way chapters that require community organizations to measure program outcomes (Hendricks et al., 2008, p.13).

The Chenango United Way has been collecting program outcome measurements from community partners since its transition to program outcome measurement in 2005. Each year the organization provides group and one-on-one technical assistance to potential grantees using staff and or volunteer time. During technical assistance, Monaco discusses program outcome measurement and assists community partners that need help improving their measures (personal communication, November 9, 2010). On average, Monaco says that most organizations spend approximately two hours developing these measures with her assistance and then continue to work on their own to complete the final product. In 2010, Monaco spent approximately 12 hours mentoring organizations on program outcome measurement (personal communication, November 9, 2010).

Both the Chenango United Way and the organizations it support put a great deal of time and effort into developing these measures. However, the Chenango United Way does not use the

data for purposes beyond allocation decision making and the creation of marketing tools. It has also never formally required or asked its grantees what they do with measurements and does not provide any technical support about what to do with the data after it is collected. This situation concerns Monaco who believes that many community partners may not be utilizing their data to improve programs. Meg Plantz, Director of Evaluation and Measurement for United Way World Wide shares Monaco's concerns and believes that many community organizations may not be effectively using their data (personal communication, November 5, 2010). While Monaco believes that requiring community partners to report these measures provides greater accountability to stakeholders, as well as influences community partners to improve program services, she also wants to ensure that organizations are effectively utilizing their data to develop and manage programs that best benefit the populations they serve (personal communication, November 9, 2010).

The Chenango United Way's greatest involvement in the community is through the funding of community organizations and ultimately it desires that its partnerships with these organizations will help benefit the community as much as possible. Finding out what community partners are doing with their data is essential to the Chenango United Way because this information will allow them to better focus their time and resources-- preparing or helping organizations to better utilize program outcome measurements to improve their programs.

Performance measurement practices are also important to the overall fields of nonprofit and public administration as many organizations develop performance measurements to remain goal driven, analyze progress toward mission fulfillment, and hold their organizations accountable. Additionally, organizations utilize performance measurement to quantify the effectiveness of their programs and show stakeholders what their programs have accomplished

and how their clients have benefited. Performance measurement has a long line of historical background with emphasis placed on its importance since 1943 (Poister and Streib, 1999). Over the years, there have been numerous studies in public administration on performance measurement, with many organizations drifting away from it in the 1980s. The lack of interest in performance measures during this time was due to similar challenges the Chenango United Way faces now—data rich but information poor, also known as the “Drip” syndrome (Poister and Streib, 1999, p. 326). Organizations during this time “concluded that the time and effort invested in these systems were not justified by the results” (Poister and Streib, 1999, p. 326). In the 1990s, there was once again a move toward performance measurement with the implementation of the Government Performance and Results Act in 1993, which required federal government agencies to report performance measures (Poister and Streib, 1999, p. 326). Additionally, the United Way of America Scandal in the 1990s focused further attention on the need for nonprofit organizations to be more accountable to the public (Jeavons, 2005). Because performance measurement practices continue to be used by many nonprofit and public administration organizations today, learning how to avoid the “Drip” syndrome and transition from collecting data to utilizing it, would allow organizations to better serve the public. Similarly, if the Chenango United Way learns what its community partners do with the data they collect from performance measurements and how they can work with partners to help them utilize this data, partners should be able to better utilize the data to improve their programs. Therefore, this study focuses on the following research questions:

Research Question One: What are the Chenango United Way community partners doing with the data they collect from their program outcome measurements?

Research Question Two: How can the Chenango United Way help community partners utilize the data collected from their program outcome measurements to improve programs?

### **Literature Review**

For many years, United Way of America has focused on program outcome measurement as a tool to measure performance. Program outcome measurement is defined by United Way of America as “changes that program activities intend to create in program participants” (United Way of America, 2005, Glossary). Of approximately 400 United Way partner organizations surveyed, 84 percent agreed or strongly agreed that outcome measurement has benefited their programs by helping them to “identify effective practices,” and seventy-six percent agreed or strongly agreed that it helped them to “improve service delivery” (United Way of America, 2005, p.1). The literature I reviewed reinforces the connection between performance measurement and program effectiveness. It focuses on the necessity of utilizing performance measurement data to improve programs, practices for improving measures, and the challenges organizations face with performance measurement. Very little literature, however, focuses on what organizations do with the information they collect from performance measurements—suggesting a gap in the literature about how organizations use performance measurements to improve their programs. This literature review will examine performance measurement as it relates to program improvement, organizational challenges with performance measurement, practices in improving performance measurement, and utilization of performance measurement.

### Program Improvement

The adoption of performance measurements by organizations can be beneficial for program improvement. (Behn, 2003; Government Performance Results Act of 1993, 2010; Johnston, Brinall, & Fitzgerald, 2002; Kravchuck & Schack, 1996; LeRoux & Wright 2010;

Spitzer, 2007; United Way of America, 2005; Wholey, 2002). The purpose of the Government Performance Results Act of 1993 was to improve program effectiveness and government decision-making (Government Performance Results Act of 1993, 2010). Since the passage of this act, studies have indeed supported the link between performance measurement and decision making. For example, LeRoux and Wright (2010) conducted a study with 314 U.S. nonprofit organizations and found that outcome and effectiveness measures are one of the most influential factors shaping managers' strategic decision-making.

While the literature suggests a positive relationship between performance measurements and decision-making, it also suggests that organizations must learn from the data they collect from these measures to improve their programs. According to Behn (2003), the main purpose of performance measurement is to make improvements. The author states that "reliable and valid data about performance is of little use to public managers if they lack a clear idea about how to use them..." (p.587). To utilize data from performance measurements, organizations must focus on performance measurement feedback and adapt changes as necessary to make the greatest impact (Kravchuk & Schack, 1996; Spitzer, 2007), as well as monitor program outcomes on a regular basis (Wholey, 2002).

#### Organization Challenges with Performance Measurement

Although studies suggest a positive link between performance measurement and decision-making, nonprofits organizations have faced difficulty with these measures. Many nonprofit organizations have transitioned from output-based to outcome-based performance measurement (Fine, Thayer & Coghlan, 2000; Poole, David, Reisman, & Nelson, 2001) due to the demands by funders for organizations to show that their programs make a measureable change in peoples' lives (Poole et al., 2001) as well as to show accountability (Ebrahim &

Rangan, 2010). However, some nonprofit organizations have found this transition challenging due to difficulties with understanding how to measure outcomes (Carman, 2007; Poole et al., 2001) or a lack of resources to monitor and evaluate them (Campbell, 2010; Wholey, 2002; Botcheva, White & Huffman, 2002). According to Ebrahim and Rangan (2010), not all organizations should or can even measure outcomes. They suggest that different organizations should measure different types of performance measurements depending on the type of work and population they serve. For example, an emergency relief organization like the Red Cross would only measure input, activities, and outputs, because it focuses “on meeting immediate survival needs rather than long-term development outcomes or impacts” (Ebrahim & Rangan, 2010, p. 19), where as an advocacy organization such as Amnesty International would measure outputs and outcomes because it works “to address the root causes of problems” (Ebrahim & Rangan, 2010, p. 21). While the literature illustrates the challenges nonprofits’ have with performance measurements, it also suggests that nonprofits are interested in learning how to be successful at measuring outcomes because they believe in the benefits it can provide (Botcheva et al, 2002; Campbell, Lambright & Bronstein, 2011).

### Practices in Improving Performance Measurement

#### *Benchmarking:*

Benchmarking was identified in the literature as one approach that organizations use to enhance the use of performance measurement (Carman, 2007; Bruder & Gray, 1994; Fine & Snyder, 1999; Murray, 2005). “Benchmarking is a system that compares the organization’s practices with those of others doing similar things but who are deemed to be doing them better” (Murray, 2005, p.360-361). Organizations develop benchmarks based on those of top organizations in their field, as well as by professional and government requirements and

standards (Fine & Snyder, 1999). This helps organizations enhance the use of performance measurements because they can compare their practices with top organizations in their field and then implement ones that are similar. While the literature described the importance of benchmarking, some studies have found that not all organizations use benchmarking practices (Campbell, 2010, Carman, 2007; LeRoux & Wright, 2010.). For example, Bruder (1994) states, “when benchmarking is planned effectively, when it focuses on the right targets, and when its recommendations are implemented and monitored correctly, the results are significant and sustainable” (p. s-9). However, LeRoux and Wright (2010) found that organizations did not rely on benchmarking practices, suspecting that nonprofit leaders view benchmarks “too much as moving targets to rely on them too heavily in making strategic decisions” (p.583).

*Training:*

Training has also been identified in the literature as a practice that can affect the success of performance measurement (Poole et al, 2001; Ristau, 2001). Studies have suggested that training organization staff about performance measurement is a key component to successful performance measurement. For example, the Connecticut Council of Family Service Agencies, Inc. (CCFSA) developed the 2000 Excellence program to provide training to its partner organizations on how to effectively develop outcome measurements, collect data, and evaluate and report data outcome measurements. The program offered group training as well as on-site technical assistance and consultation. CCFSA found that organizations that participated developed a better skill set in outcome measurement (Ristau, 2001). Poole et al. (2001) also highlight the importance of training.



*Technology:*

Along with benchmarking and training, organizations need adequate technology to be successful at managing performance measurements (Berman & Wang, 2000; Carman, 2007; Poole et al, 2001; Smith and Goddard, 2002). In a study of US Counties, Berman and Wang (2000) found a significant relationship between county agencies' satisfaction with outcome performance and the use of adequate information technology, and Poole et al. (2001) found a significant relationship between technology and the quality of an evaluation plan. However, Poole et al (2001) also point out that often organizations do not have appropriate technology, such as computer software, to manage performance measurements or do not have adequate training to use the software. According to the authors (2001), "Organizations that do not have adequate and appropriate technology usually have difficulty designing, implementing, and evaluating their products or services" (p.408). Therefore, the authors recommend that organizations provide staff members with adequate technology to ensure proper management of performance measures.

Utilization of Performance Measurement

While the literature I reviewed discussed the importance of utilizing performance measurements to make decisions about program improvement, as well as practices that affect the strength of the measurements, it did not mention or provide examples of how organizations actually use the data to make decisions or improve programs. For example, Campbell et al. (2010) found that nonprofits generally agree that data is a useful source for their organization and that many organizations discuss results internally and externally with clients, but they do not discuss the results of those discussions or how this reporting results in program improvement. Similarly, LeRoux and Wright (2010) discuss that performance measurements impact decision-

making, but do not discuss how the data from these measures are used to make decisions or the types of decisions that organizations make. Additionally, Spitzer (2007) explains why learning from the data collected from performance measurements is crucial for program improvement but does not provide examples of organizations that have learned from their data and how they used it to improve programs. There is an extensive discussion about what performance measurements are and why they are beneficial to organizations, but the discussion on the extent to which organizations use them and how they use them is limited. This suggests that that further studies about performance measurement utilization among organizations is necessary.

### **Methodology**

In order to learn what the Chenango United Way community partners did with the data collected from performance measurements and to learn how the organization could work with its partners to better utilize this data to improve programs, this study focused on two populations: 1) Chenango United Way community partner directors and 2) administrators from other United Way chapters. Appendix A includes documentation of the Human Subjects Research Approval for my research project. I focused my study on community partner directors because of their direct involvement in the performance measurement process and ability to provide key information about their organizations' performance measurement practices and utilization of data. Additionally, I focused on other United Way chapter administrators because of their continuous work in funding performance-based programs and knowledge in performance measurement best practices. Both groups provided critical insight to my research because of their different levels of experience and use of performance measurements.

Data Collection

In order to collect the data for this study, I conducted interviews with both groups of directors/administrators. Table 1 describes the data collection process for each group of directors/administrators.

*Table 1 – Data Collection Process*

<b>Interview Participants</b>	<b>Number of Participants</b>	<b>Interview Type</b>	<b>Interview Focus</b>	<b>Limitations</b>
Chenango United Way Community Partner Organizations	8	In-person	<ul style="list-style-type: none"> <li>- Development of Performance Measurements</li> <li>- Collection of Performance Measurements</li> <li>- Utilization of Data from Performance Measurements</li> </ul>	Biased Responses
United Way Chapters	4	Via Telephone	<ul style="list-style-type: none"> <li>- Role of United Way With Community Partners' Performance Measurements</li> <li>- Performance Measurement Best Practices</li> </ul>	Biased Responses Representativeness

Interviews were an important data collection tool for this study because they allowed me to learn detailed information about each organization's performance measurements, which may not have been disclosed in other data collection methods. Interviews were also an appropriate source of data because of the small sample size I chose for this study. I conducted twelve interviews with the following individuals: eight directors from Chenango United Way community partner organizations, the director of the Chenango United Way, and three administrators from other United Way chapters. In order to best represent the community partner population, I interviewed

community partner directors identified by the Chenango United Way director as having different levels of experience with performance measurement. The three United Way chapter administrators were chosen based on their high level of experience with performance measurements and community partners. Additionally, the three administrators were from United Way chapters that were identified as early adopters of performance measurement by the United Way of America. These chapters are considered early adopters of performance measurement because they began implementing performance-based granting before United Way of America established itself as an outcome performance organization. In addition, I interviewed the director of the Chenango United Way in order to develop a clear picture of the organization's work with its community partners, and to compare its practices with the identified early adopters' practices.

The interviews I conducted with community partners directors were semi-structured and took place in-person. I asked all community partner directors the same questions. Appendix B lists the community partner interview questions. The interview topics included organizations' development of performance measurements, collection of performance measurements, and utilization of the data collected from these measures. The director of the Chenango United Way was also interviewed in-person but asked a different set of questions related to the organization's role with community partners' performance measurements as well as performance measurement best practices. I interviewed the other United Way chapter administrators with the same set of questions as the Chenango United Way director via telephone. Appendix C lists the United Way chapter questions. All interviews were approximately one to two hours in length. I audio taped and took handwritten notes for all in-person interviews, and all in-person interview participants signed audio and informed consent forms. Participants who were interviewed via phone

consented to the study orally, and I took handwritten notes. All participants were told that their answers would remain confidential.

### Data Analysis

The data I collected from the twelve interviews was coded thematically. I coded the data inductively, by analyzing similar response patterns from participants as they related to my research questions. I chose an inductive method to remain neutral to the study and avoid personal bias in my findings. To track response patterns, I developed tables of responses that correlated with each participant. Each time a response occurred more than once, I recorded the response and then recorded the number of participant who responded similarly. While analyzing my data, I identified many themes including ways in which Chenango United Way community partners utilize data from performance measurements, challenges community partners face with performance measurements, Chenango United Way practices that are useful to community partners, and current performance measurement trends that help nonprofits. To present my data, each organization was labeled with a letter as an identifier in order to protect the confidentiality of my participants.

### Limitations

There are two main limitations to this study involving biased responses and representativeness. I describe both limitations below.

*Biased Responses:* This study analyzes performance measurement practices by organizations that have a vested interest in the outcome of this study. Because community partners receive funding from the Chenango United Way, it is possible that community partner directors were not completely candid with their responses or that they responded based on what they perceived were answers the Chenango United Way would want to hear. Similarly, United

Way chapters are guided by the United Way of America and therefore, it is possible that United Way chapter administrators were also not completely candid in their responses or responded based on what they perceived were answers that United Way America would want to hear. To limit bias responses, all interviewees were reminded that all the information they shared would be kept confidential.

*Representativeness:* This study analyzes performance measurement practices from three United Way chapters. However, there are more than 450 United Way chapters who require their community partners to collect performance measurements. Because best practices were collected from a small number of chapters, the practices may not be representative to all United Way chapters.

## **Findings**

I identified four findings including: 1) community partner organizations are utilizing their data to be accountable, develop performance measures, make decisions, and secure future funding; 2) community partner organizations find the logic model, community needs assessment, and technical assistance provided by the Chenango United Way useful; 3) community partner organizations find developing measurable outcomes challenging; and 4) blueprints/methodology plans are a current trend within United Way and government agencies that may be of use to organizations who struggle with measureable outcomes. Appendix D details additional patterns of response from Chenango United Way community partners including organization collaboration, training opportunities, and technology used for data collecting and evaluation.

*Finding One: Community partner organizations are utilizing their data to be accountable, develop performance measures, make decisions, and secure future funding.*

All community partner organizations are utilizing data in some capacity, but had mix responses

about how they use it. Table 2 details the response patterns of different participants about the way that they utilize performance measurement data.

*Table 2 – Response Patterns of Utilization of Data by CUW Community Partners*

<b>Patterns of Response</b>	<b>A</b>	<b>B</b>	<b>C</b>	<b>D</b>	<b>E</b>	<b>F</b>	<b>G</b>	<b>H</b>	<b>Number of Responses</b>
<b><i>Accountability</i></b>									
Uses to show that organization did what it said it would		x	x	x	x	x	x	x	7 of 8
Uses to reports data to Chenango United Way		x	x	x			x	x	5 of 8
Uses to reports data to board members	x	x		x			x		4 of 8
Uses by looking at data frequently to make sure measurements are being met		x	x		x	x			4 of 8
Uses for promoting program by highlighting success to clients and community	x								1 of 8
<b><i>Secure Future Funding</i></b>									
Uses for applying for other grants	x	x			x	x			4 of 8
<b><i>Develop Performance Measures</i></b>									
Uses for developing next year's measures	x	x	x	x	x	x	x	x	8 of 8
<b><i>Decision Making</i></b>									
Uses to adjusting service or add more services to programs		x		x	x	x			4 of 8
Uses for adding or eliminating program				x	x		x		3 of 8
Uses for program monitoring changes							x	x	2 of 8
Uses for staffing decisions						x			1 of 8
Uses for financial decisions						x			1 of 8

Accountability and the development of new performance measurements appear to be a priority for organizations, as all community partners focused their attention on these areas. In regards to accountability, the director of organization E said that performance measurement "is why you do what you do. You want to know that when you are building activity in a program and curriculum that you are doing it, you are delivering it. You aren't just saying you are going to do it." This is also consistent with the literature, which illustrates that organizations use performance measurements to show accountability (Ebrahim & Rangan, 2010). In regards to utilizing performance measurement data to develop new performance measurements, all community partner organizations also responded that when they begin developing their

performance measurements for a previously funded Chenango United Way programs, they look at the previous year's measurements and results to determine their new ones. Additionally, half of the Chenango United Way community partners are utilizing performance measurement data to secure future funding by using the measurements and/or results to apply for additional grants.

Finally, six community partner organizations are utilizing their data to make decisions about their programs. The director from Organization D said, "If you aren't doing what you said you were going to do then you have to change that. Maybe you have to change your target, maybe you have to change what type of outcome you are looking for... maybe that is not what the community needs so you have to change something that you are doing... you would change your program depending on the needs of the community." Organizations specifically use the data to make decisions about staffing, finances, services (such as adjusting a service or adding a service to a program), programming (such as adding or eliminating a program), and monitoring tools (such as changing the way the organization monitors results).

Program service was the primary focus of decision making, as half of the director from the organizations identified times in which they have changed a service due to what they learned from the performance measurement data. For example, the director from organization B learned that participants didn't like a particular service and eliminated it from the program, and the director from organization D recognized that participants needed a particular service and added it to the program. A United Way chapter administrator supports the finding that nonprofits use performance measurement data to make service-based decisions with a story from the chapter's own community partner. One of the chapter's community partners learned from its data that a specific curriculum it had in place was not helping its clients. The organization found that year after year families were unable to pass its testing criteria, so the organization started looking at



the people who utilized its program and the level of their education. They found that the level of education of its current clients had dropped from previous years and therefore, developed a new curriculum that was more effective for the new population of people utilizing its program. Utilizing performance measurement data to make decisions such as those describe above are consistent with the literature which also identifies performance measurement as influencing managers' decision making (LeRoux and Wright, 2010).

While half of the community partner directors utilize data to make decisions about program services, it is also notable that the other half did not identify this as a use. Both directors from organization C and H said that they do not use the performance measurement data they collect for Chenango United Way to make decisions about program services. Regarding performance measurement data, the director of organization C said, "There is not much as far as with this particular grant that I can do with it. It is what it is." Both directors explained that they use the data to see whether or not they are meeting their outcomes, but look at other organizational data such as staff or client feedback to make decisions about program services. The director of organization C said "We do a survey every year...and we do base more changes on that... we look at what needs are and make changes to how we deliver the service." The director of organization G also explained that the organization uses other data to make changes to program services. Additionally the director from C explained that the organization always meets its outcomes for the Chenango United Way so it really has not needed to make changes. The director of organization A felt similarly, explaining that while the program outcomes were lower than what the organization expected, the organization still accomplished the outcomes it wanted to. Therefore, the director explained that the organization had to develop lower more

reasonable performance measurements for the following year, but did not have to change the program service.

While the data illustrated that all community partners are utilizing performance measurement data in some capacity, there appears to be a disconnect between the Chenango United Way and its community partners, as the director of the Chenango United Way was unaware of community partners' utilization of the data. When speaking about what organizations do with their performance measurement data she says, "other than submit it to us, I have no idea." The other United Way chapter administrators I interviewed do not experience this disconnect with their community partners, as they require partners to identify how they utilize their data in their request for proposal (RFP). One administrator said, "Many of our funded agency partners do use the data for program improvement, others do not. We know this because 'use of outcome data for program improvement' is an assessed item on our request for proposals for strategic grants. Those that are truly using it, describe in some detail the improvements made and why; they are proud of the accomplishment. Others appear to collect the data only because United Way asks for it." Another administrator mentioned that while the chapter does not score its community partners based on their answer to this question, it does follow up with them and work with them to improve their answer if there are concerns.

*Finding Two: Community partner organizations find the logic model, community needs assessment, and technical assistance provided by the Chenango United Way useful.*

Just as every community partner organization responded that they utilize their performance measurement data in some capacity, they all also identified at least one Chenango United Way practice that was beneficial to them. Table 3 depicts the response patterns of useful

practices identified by Chenango United Way community partners.

*Table 3 – Community Partner Response Patterns of Useful CUW Practices*

<b>Patterns of Response</b>	<b>A</b>	<b>B</b>	<b>C</b>	<b>D</b>	<b>E</b>	<b>F</b>	<b>G</b>	<b>H</b>	<b>Number of Responses</b>
<b>Chenango United Way (CUW) Practices</b>									
<b><i>Technical Assistance</i></b>									
Technical Assistance is Beneficial - group and/or one-on-one assistance	x	x	x	x	x			x	6 of 8
<b><i>Community Needs Assessment</i></b>									
Data from CUW community needs assessment is useful when applying for grants and developing measurements				x		x	x	x	4 of 8
<b><i>Logic Model</i></b>									
CUW current logic model is helpful with developing performance measurements and/or focusing on meeting measurements		x	x		x				3 of 8

Technical assistance seems to be the most beneficial for organizations, as six directors said that it was helpful to them. According to the director of organization D, “United Way is pretty helpful. They give technical assistance and they are always there to answer any questions... I would say they’re probably one of the most thorough funders that we have.” Additionally, half of the organizations also indicated that the community needs assessment provided by the Chenango United Way was useful when writing grants and/ or developing measures, and three of the eight thought the current logic model that Chenango United Way requires them to fill out was helpful with developing and/or managing performance measurements, as well as with focusing on meeting them. When developing its measures, organization C says, “I really rely on this form [logic model] that Elizabeth [CUW director] has developed...” The director also says that the logic model “kind of grounds me when I am writing that grant.”

All of the other United Way chapter administrators I interviewed provide training to their community partners specifically related to outcome measurement. One administrator said the chapter does an introduction to outcomes training and another administrator said the chapter



This challenge has also been identified in the literature about performance measurement, which further illustrates a real issue that organizations are facing (Carman, 2007; Ebrahim & Rangan, 2010; Poole et al, 2001). Three directors said that some outcomes cannot be measured. The director of organization F provided an example about reducing hunger explaining that “you can make the leap of logic that there was less hunger if more food got to the streets without actually knowing, without taking it the next step further and saying yes we actually followed cases that said that they were less hungry. You have kind of an assumption but do not genuinely know.”

The organizations say that programs create outcomes even though they are not always easy to report. According to the director of Organization D, “It is hard to prove what we do, but we are funding so many peoples’ lives .... It is hard to show all that we do on a report.” Two organizations did not even apply for grants for particular programs because they could not prove results. “I am sure that there are a lot of programs out there that are not measureable that are providing significant impact in the community that will never get funded,” said the director of organization A, who also explained that the organization had to develop a new program because it could not come up with measurable outcomes for the one it wanted funded. The difficulty with outcome measurements that these organizations describe is also identified in the literature. Ebrahim and Rangan (2010) explain that some programs cannot measure outcomes because they provide immediate need services rather than long term need services.

*Finding Four: Blueprints/methodology plans are a current trend within United Way and government agencies that may be of use to organizations who struggle with measureable outcome.*

Five Chenango United Way community partners receive state and federal grants or are mandated by their national partner agency to follow specific output and outcome measurements.

In many of these cases, the organizations do not have to develop their own methodology for measuring outcomes as they are provided with a plan from their funder/partner agency that includes what types of outputs they need to fulfill to reach the outcomes they desire. Two United Way chapters also provide their community partners with specific outcome methodologies that they call blueprints. The blueprints were developed by working with community partners to develop the best methodologies for reaching certain outcomes. One chapter spent two years conducting research to develop the blueprint and now has documents that organizations must utilize to develop measurable outcomes. In addition, the blueprint allows the chapters to collect measurements from their community partners that can be aggregated to show the impact United Way has on the community.

While two United Way chapter administrators expressed the benefits of blueprints, an administrator from another chapter said, "We have no thought of doing blueprints....measuring program outcome is just that. I cannot expect all agencies to measure the same outcome the same exact way...you are not going to be able to prove community impact by measuring program level outcome." The administrator explained that the chapter would never use a blueprint based on how its United Way does investment today, because it is a community investment United Way not a community impact United Way. A community investment organization focuses on meeting a community need unlike a community impact organization that focuses on changing a community need. Although United Way of America has made community impact a strong focus area, the administrator said, "I am still the United Way and I have this responsibility to provide basic needs... are we ever going to stop being able to feed people? No." This United Way may consider adding a community impact focus area, but would not eliminate the community investment focus.

## Recommendations

After analyzing my data and findings, I recommend the following: 1) collect information from community partners about data utilization by including a question in the RFP that asks organizations how they use data from performance measurements; 2) communicate with early adopter chapter administrators that have blueprints; 3) provide community partner organizations with additional training about developing measureable outcomes; 4) allow community partners to use performance measurements that are most useful to them for program improvement; and 5) continue practices identified as useful to community partners and develop an annual survey to stay connect to partners about practices they like and dislike. These recommendations provide a way for the Chenango United Way to become more connected with its community partners, as well as allow the organization to see community partners' challenges. By staying connected with community partners, the Chenango United Way will be able to help community partners with the performance measurement process in order to best utilize data to improve programs.

*Recommendation One: Collect information from community partners about data utilization by including a question in the RFP that asks organizations how they use data from performance measurements.*

The Chenango United Way was unaware of how its community partner organizations utilize performance measurement data and was concerned that some organizations were not fully using it to make program improvements. By adding a question to the request for proposal, the Chenango United Way would no longer have to wonder what its community partners are doing with their data. In knowing how community partners utilize data, the Chenango United Way will have greater insight into what its organizations do to improve programs and may even be able to provide suggestions to organizations when necessary. This additional question will also

illustrate to community partners that the Chenango United Way finds the utilization of data an important area of focus, which will remind them to think about it as they develop, collect, manage, and use their performance measurements.

*Recommendation Two: Communicate with early adopter chapter administrators that have blueprints.*

The United Way of America has begun focusing on community impact and is putting pressure on local United Way chapters to measure this impact. Additionally, the government is also focusing on creating impact, and many Chenango United Way community partners are already following specific methodology plans provided by the government. Therefore, the Chenango United Way should call chapter administrators who have blueprints to learn how they developed and implemented their blueprints. They should also see if any of the chapters' blueprints are relevant for Chenango County and or if they can be utilized by community partners. By keeping an open line of communication with administrators and learning from United Way chapters who have already done their research and have blueprints, the Chenango United Way will remain current with the trend toward focusing on impact and may also be able to adopt specific parts of a blueprint that fit its community. This would be helpful to community partners that have difficulties developing their own measurable outcomes.

*Recommendation Three: Provide community partner organizations with additional specialized training about developing measurable outcomes.*

Developing measurable outcomes was one specific challenge identified by several community partner organizations. The Chenango United Way should provide an optional group training or workshop to organizations who find developing measurable outcomes challenging. The training should be optional, because not all organizations identified this as a challenge. All



of the other United Way chapters already provide their partners with outcome measurement training, which they have found effective. If the Chenango United Way does not have the internal expertise to train community partners, it should bring in an outside expert to provide the training. This training will be beneficial to several organizations and will provide the potential for community partners to develop more effective outcome measures to improve a program. It may even give a director the opportunity to develop measurable outcomes for a program it could not previously get funded.

*Recommendation Four: Allow community partners to use performance measurements that are most useful to them for program improvement*

The literature supports that all nonprofit organizations are different and therefore should use different performance measurements to show their results (Ebrahim & Rangan, 2010). Half of the community partners identified developing measure outcomes as difficult, and three of the community partners do not believe that all outcomes are measurable. Two community partners also explained that they learn how to improve programs from other tools such as staff and client feedback. Because each community partner is so different, the Chenango United Way should consider whether it is realistic for all organizations to measure outcomes. If the Chenango United Way finds that an organization provides a necessary service to the community but that outcome measurements are impractical, the Chenango United Way should allow community partners to present other ways of measuring results that would best help them improve their programs.

*Recommendation Five: Continue practices identified as useful to community partners and develop an annual survey to stay connected to partners about practices they like and dislike*

All community partner organizations identified at least one United Way practice they find useful to their program. Because these practices have been useful, United Way should continue them. However, if Chenango United Way moves forward with these recommendations, it will add practices without knowing the effects they have on its community partners. By conducting an annual survey to get community partner feedback, the Chenango United Way can continue to learn what practices are beneficial and what are not. This will help the Chenango United Way focus its time in areas that need the most attention to best benefit its community partners and their programs and clients.

## **Conclusion**

Prior to this study, the director of the Chenango United Way speculated that community partner organizations were not fully utilizing their performance measurement data to improve programs. While this study found that community partner organizations are utilizing their data in some capacity, their responses were mixed. For example, only half of the community partners are using the performance measurement data to make decisions about program service improvement. By implementing the recommendations above, the Chenango United Way should be able to develop a stronger relationship with its community partners, help develop more uniform uses of performance measurement data throughout organizations where needed, help organizations with performance measurement challenges, and help organizations think of ways that their data could be used for program improvement.

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## Appendix A



Date: March 2, 2011  
To: Rebecca Sands, MPA

From: Anne M. Casella, CIP Administrator  
Human Subjects Research Review Committee

Subject: Human Subjects Research Approval  
Protocol Number: 1632-11  
Protocol title: *Utilizing Performance Measurement Data to Improve Program Effectiveness*

Your project identified above was reviewed by the HSRRC and has received an Exempt approval pursuant to the Department of Health and Human Services (DHHS) regulations, 45 CFR 46.101(b)(2) .

An exempt status signifies that you will not be required to submit a Continuing Review application as long as your project involving human subjects remains unchanged. If your project undergoes any changes these changes must be reported to our office prior to implementation, using the form listed below:  
[http://humansubjects.binghamton.edu/2009\\_Forms/012\\_Modification%20Form.rtf](http://humansubjects.binghamton.edu/2009_Forms/012_Modification%20Form.rtf)

Principal Investigators or any individual involved in the research must report any problems involving the conduct of the study or subject participation. Any problems involving recruitment and consent processes or any deviations from the approved protocol should be reported in writing within five (5) business days as outlined in Binghamton University, Human Subjects Research Review Office, Policy and Procedures IX.F.1 Unanticipated Problems/adverse events/complaints. We also require that the following form be submitted: <http://humansubjects.binghamton.edu/Forms/Forms/Adverse%20Event%20Form.rtf>

University policy requires you to maintain as a part of your records, any documents pertaining to the use of human subjects in your research. This includes any information or materials conveyed to, and received from, the subjects, as well as any executed consent forms, data and analysis results. These records must be maintained for at least six years after project completion or termination. If this is a funded project, you should be aware that these records are subject to inspection and review by authorized representative of the University, State and Federal governments.

Please notify this office when your project is complete by completing and forwarding to our office the following form: <http://humansubjects.binghamton.edu/Forms/Forms/Protocol%20Closure%20Form.rtf>

Upon notification we will close the above referenced file. Any reactivation of the project will require a new application.

This documentation is being provided to you via email. A hard copy will not be mailed unless you request us to do so.

Thank you for your cooperation, I wish you success in your research, and please do not hesitate to contact our office if you have any questions or require further assistance.

Cc: file

Kristina Lambright

Anne M. Casella, CIP  
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## Appendix B

### Interview Questions for CUW Community Partners

1. How many years have you been the Director of your organization?
2. In your own word, describe what performance measurements mean to you and your organization?
3. How many years have you been developing performance measurements for the CUW?
4. Please explain the process you go through when developing performance measurements?
  - How do you decide what measures to use?
  - Who participated in the process of developing the measures?
  - Do you review your previous year performance measurements?
  - Do you work with staff and board members?
5. Please explain the process you use to collect your data for performance measurements in your organization?
  - How are you collecting your data?
  - Who is responsible for collecting your data?
  - How often do you monitor your progress in collecting the data?
6. After you have collected the data from your performance measurements what do you do with it?
  - Do the results from your measurements affect your decision for the organization?
7. Do you find performance measurements beneficial for your organization? Why or why not?
8. What performance measurements that you collect are most useful to you?
9. What would help make performance measurements more useful for your organization?
  - What training opportunities would you be interested in participating?
10. You are currently required by the Chenango United Way to measure community impact. Describe to what extent this is beneficial to your organization?
11. Is there any further information you would like to share in this interview related to performance measurement?



**Appendix C**

## Questions for United Way Agencies

1. How did your organization get involved with performance measurement?
2. What do you do with performance measurement data you collect from your community partners?
3. Please provide details about the training opportunities you provide your community partners?
4. Describe the process you require your community partners to use in the development of performance measurements?
5. Describe the process you require your community partners to use in the reporting of performance measurements?
6. What do your community partners do with the data they collect from performance measurements? How do you know this?
7. In what additional ways do you think community partners could use the data they collect from performance measurements to improve programs?

