

Paper Title: Assessing Quantitative and Qualitative Approaches to Measure Program Outcomes in Human Service Organizations

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Abstract

Leadership and organizational performance are interconnected, and in many cases the two go hand in hand. In nonprofit organizations, leaders are expected to guide and produce positive program outcomes that reflect the mission of the organization. One problem nonprofit leaders face, however, is *how* to measure program outcomes. What metrics, including impact measurement and performance measurement, of outcomes are available for nonprofit leaders to use? How does a leader know if his or her nonprofit is performing well? Are there any new frameworks or models to consider that may help with this problem? This paper addresses these questions by exploring the nonprofit literature on performance measurement specific to human service organizations. In addition, the paper creates three frameworks that can be used by nonprofit leaders to help measure their program outcomes.

Introduction

Nonprofit organizations and their leaders measure program outcomes for several reasons. Many rely on metrics to determine program effectiveness, budget projections' accuracy, and mission achievement (Behn, 2003). Often, the leaders of nonprofit organizations publicize their intended and unintended successes to the clients they serve and potential donors and stakeholders they wish to influence, with the intent of increasing their client and donor bases. As nonprofit leaders face increasing pressure to fundraise, anecdotal evidence shows that effective nonprofits with measurable results will attract more funding. With this pressure to show results, there has been an ongoing interest and call for research on program performance and outcome measurement, which is especially true for human service organizations (Stone & Cutcher-Gershefeld, 2001; Bryan & Brown, 2015).

As one of the major groups listed in the National Taxonomy of Exempt Entities' (NTEE) 'Core Codes' to classify nonprofit organizations, human service organizations are the largest classification with eight subcategories including crime and legal-related; employment; food, agriculture, and nutrition; housing and shelter; public safety, disaster preparedness and relief; recreation and sports; youth development; and human services (National Taxonomy of Exempt Entities, 2020). Within each subcategory there are hundreds of specified organization types. Given the variety of organization types in the broader category of human service organizations, standardization, and generalizability of impact and program outcome measurement is nearly impossible. While the literature exploring the successes and failures of human service organizations is extensive, nonprofit leaders face many challenges in their approaches to program outcome measurement. These challenges also illustrate the diversity of research

approaches in this field. Even the simple task of finding a standard definition of program effectiveness and efficiency is problematic (see Sowa, Selden, & Sandfort, 2004 or Mitchell, 2015).

As a result of the multidimensional and socially constructed nature of evaluating organizational performance and program outcomes (Herman & Renz, 1997), few academic articles examine leaders' methodological practices and processes in determining the best way to measure program outcomes in human service organizations (Stone & Cutcher-Gershefeld 2001; Packard, 2010; Bryan & Brown, 2015). Thus, in this study we seek to determine how nonprofit leaders measure program performance in human service organizations, and what practices and processes exist to measure successes and failures in these organizations. We ask the following questions: What metrics, including impact measurement and performance measurement, of outcomes are available for nonprofit leaders to use? How does a leader know if his or her nonprofit is performing well? Are there any new frameworks or models to consider that may help with this problem?

This research aims to advance knowledge on program outcome measurement in human service organizations while acknowledging each human service organization's mission's unique nature makes it challenging to create a generalizable model across all nonprofit human service organizations. Using survey and qualitative data on human service organizations, we propose three frameworks to measure program performance. We argue that moving forward, leaders and researchers must be more transparent about the implications of the program performance measures they use, and we offer specific ways they can do this. Finally, we suggest ways in which the study of human service organizations' program outcome measurements can progress. While contributing to the academic discussion on the measurements used to evaluate human

service organizations' program performance, our research also offers important insights for nonprofit leaders, managers, marketers, board members, and funders.

Literature Review

Performance measurement, the tool with which organizations can measure their progress toward achieving their goals or mission, has inspired wide-ranging literature within the nonprofit sector and the public and private sector literature. This study contributes to this body of literature by exploring the nature of multidimensional performance measurement in human service nonprofit organizations, specifically. This literature review will explore human service organizations to set parameters for the organizations included in the study, provide an overview of the literature on performance measurement in nonprofit organizations, and look more closely at multidimensional performance measurement specific to human service nonprofit organizations and their leaders.

Defining Human Service Organizations

Human Service Organizations "share an overall goal of improving their clients' quality of life by providing assistance aimed at resolving the crisis, creating stability, or fostering development and improvement" (Mensing, 2017 p.207). This broad conceptualization captures organizations in varying service areas from economic development to group homes, from family services to emergency assistance, from senior services to childcare. This definition does not limit human service organizations' work to the third sector; instead, human service delivery occurs in nonprofits, for-profits, and government organizations alike. Regardless of sector, these

organizations are intimately involved in everyday public life. Some human service organizations such as the United States Department of Health and Human Services and the American Red Cross take on the national stage. In contrast, others focus on smaller settings, such as local homeless shelters or food banks. When conceptualized in the nonprofit space, the NTEE identifies eight sub-groups of human service organizations including, crime and legal-related; employment, food, agriculture, and nutrition; housing and shelter; public safety disaster preparedness and relief; recreation and sports; youth development; and human services (Public Charities, 2017).

The number of human services nonprofit organizations has grown in recent years. From 1995 to 2017, the number of organizations grew by nearly 130% to 147,875, with the largest percentage of those organizations operating human services (Norris-Tirrell, 2014, Public Charities, 2017). Regardless of sub-grouping, these nonprofit human service organizations vary widely in size with more than operating on a level of total revenue less than \$100,000 and only about 18.3% operating with a total revenue level of more than a million dollars (Public Charities, 2017).

Although the human service organization sector's scope is broad, there are essential distinctions between *nonprofit* human service organizations and their *governmental* counterparts. Perhaps the most noteworthy difference is funding. The most wide-reaching government human service organization, HHS, has a budget of nearly 1.5 trillion dollars (United States, Department of Health and Human Services, 2020) and provides services ranging from substance abuse to faith-based partnerships (Secretary & Assistant Secretary for Public Affairs (ASPA), 2015), which is in sharp contrast to most local nonprofit human service organizations operating on less than 100,000 dollars per fiscal year in total revenue. This lack of nonprofit funding has led

human service nonprofit organizations to seek funding from the government at higher and higher rates (Boris, de Leon, Roeger, & Nikolova, 2010). Government contracting for human services has skyrocketed in recent years. Funding relationships with federal, state, and local governments allow the government to provide their constituents' human service needs by providing funding to organizations with comparatively higher service delivery capacity (Boris, de Leon, Roeger, & Nikolova, 2010).

Nonprofit human service organizations depend on fundraising, therefore, to most accurately portray the performance of the nonprofit, leadership needs to consider what method of measure will best demonstrate their efforts and accomplishments or failures based on what is most important to their specific organization. Whether that is looking at leadership impact and ability to leverage social capital, an organization's financials, or considering the amount of people served, this decision informs donors and clients differently. This paper will address the importance of these decisions for nonprofit leaders and propose modes for operationalizing their best option.

To create some structure within the broad scope of human service organizations, we adopt the NTEE definition for tax-exempt (nonprofit) human service organizations as the standard for organizations in the study. Their definition specifies that human service organizations "provide a broad range of social services for individuals or families" (*The National Taxonomy of Exempt Entities*, 1990).

Performance Measurement

Next, we explore the multidimensional measures of program performance within the nonprofit literature. After reviewing how scholars have addressed performance measurement in

nonprofit organizations, we conclude by looking more closely at human service nonprofit organizations' performance measures.

Nonprofit Performance Measurement

For years, nonprofit scholars and practitioners alike struggled to measure performance because the for-profit business models that relied upon financial statements alone were insufficient (Forbes, 1998; Beamon & Balcik, 2008; Henderson et al., 2002). More recent performance measurement approaches had to overcome this nonprofit constraint to display performance measures taking into account much more than financial well-being in the for-profit sense creating a multidimensional understanding of performance (Kaplan, 2001; Henderson et al., 2002; Ebrahim, 2005; Herman & Renz, 2008; Sowa et al., 2004).

Much of the literature on nonprofit performance measurement undertakes the creation, application, and analysis of performance measurement frameworks. These *frameworks* help nonprofit practitioners develop performance measurement *systems* (Rouse & Putteril, 2003) and lend some understanding of the many dimensions of nonprofit performance measurements for nonprofit leaders to contemplate. One such multidimensional approach to performance measurement developed in the early 2000s, known as the Balanced Scorecard, considers the financial and internal perspectives, customer perspectives, and organizational learning and growth (Kaplan, 2001).

The more traditional financial standards of performance, such as debt ratios, rates of overhead spending, budget size, and explicit financial controls (Kaplan, 2001), are included in the financial perspective. The internal processes consider innovation and measurable operating performances, such as organizational capacity. The customer perspective relies on "market share,

customer retention, new customer acquisition, and customer profitability" (Kaplan, 2001, p.357). In the nonprofit space, these "customers" are "clients." Finally, the organizational learning and growth perspective measures employee motivation, capacity, and mission alignment. The balanced scorecard has been used in many sectors and applied to the nonprofit sector throughout the literature (Perkins & Fields, 2010; Niven, 2008; Ronchetti, 2006; Messeghem et al., 2018; Gumbus, Andra & Wilson, 2004).

Another framework, known as the Multidimensional and Integrated Model of Nonprofit Organizational Effectiveness, looks at nonprofit effectiveness at two levels; management and programmatic, each broken down into capacities and outcomes (Sowa et al., 2004). The first level, management capacity, captures the "characteristics that describe an organization and the actions of managers within it" (Sowa et al., 2004 p.714) such as leadership attitude, leadership evaluations, leadership tenure, staff turnover, and strategic planning and board performance (Green & Griesinger, 1996; Brown, 2005). Meanwhile, the programmatic level focuses on services provided, intervention strategies, and program capacity.

Frameworks such as those proposed by Sowa et al. (2004) and Kaplan (2001) provide a useful mechanism for organizing and conceptualizing nonprofit performance measurement. However, there is a wealth of literature that expands the performance measurement categories, as mentioned above. The literature addresses the need for performance measurement to be aligned with organizational mission (Sheehan Jr., 1996; Sawhill & Williamson, 2001) while also broadening the understanding of how nonprofit organizations can balance financial measures like fundraising efficiency, continuous improvement, and public support (Ritchie & Kolodinsky 2007; Lu, Shon, Zhang, 2020). A 2016 study by Willems suggests that, within the nonprofit setting, the mental models of nonprofit leadership impact organizational performance. They

measured facets like leadership team dynamics and stakeholder involvement in decision making to impact nonprofit performance in moments of crisis (Willems, 2016). Not only is leadership attitude impactful, but so is the experience (positive or negative) of the clients served (Carman, 2007). Still, others focus on the social connection between an organization and its' community, specifically their ability to leverage social capital (Moldananova & Goerdel, 2018). The breadth of the literature itself provides a convincing argument for the multidimensional nature of nonprofit performance measurement.

Nonprofit Human Service Organization Performance Measurement

Like other types of nonprofits, performance measurement also poses a challenge to nonprofit human service organizations (Carnochan et al., 2013; Kim, 2014). The diversity of clients served makes identifying appropriate measures even more difficult (Carnochan et al., 2013). Many social service nonprofits have resigned to the most straightforward measure of organizational performance; the number of people served (Carman, 2007). However, there are numerous other performance measurements identified in the literature.

LeRoux and Wright (2010) suggest overcoming the hurdles facing these organizations by including client perspectives in creating performance measures, providing staff with access to the data they need, and creating a diversity of funding streams. Sufficient program funding and effective and efficient resource allocation and staff motivation and commitment to the program have also been identified as significant factors in determining the success or failure of nonprofit human service organization programming (Packard, 2010). Scholars also measure the professionalism of nonprofit human service organization staff related to performance and found a positive relationship between performance and employee empowerment, control, equity,

training, and working conditions (Schmid, 2002). Nonprofit leaders hold a crucial role in controlling the environment and should consider these factors when making decisions to increase performance.

In the past, nonprofit organizations, including those in the human services space, have struggled to create meaningful organizational and programmatic performance measures. The response to this hardship has been to create a multidimensional understanding of performance measurement that considers not only organizational finances, like in the for-profit sector, but also nonprofit leadership, management, programs, funding, and clients.

Proposed Performance Measurement Frameworks

This section proposes three frameworks to measure program outcomes and performance of nonprofit human service organizations. The frameworks are derived from the constructs and variables discussed in the literature above in addition to survey data on program evaluation metrics from 396 nonprofit human service organizations from across the country¹ and a study on nonprofit organizational resilience in human service organizations that was conducted in the Colorado Springs, Colorado area.² The survey data and qualitative information collected from the organizational resilience study were analyzed and compared to existing frameworks in the nonprofit performance measurement literature. From this analysis and comparison, three frameworks were created are exemplary models in measuring nonprofit human service program performance.

¹ Data was collected by Excellence in Giving's Nonprofit Analytics program. The survey includes both qualitative and quantitative metrics of program effectiveness. <https://www.excellenceingiving.com/>

² The Quad Partnership conducted a study of nonprofit organizations in Colorado Springs to determine what factors define and predict organizational resilience.

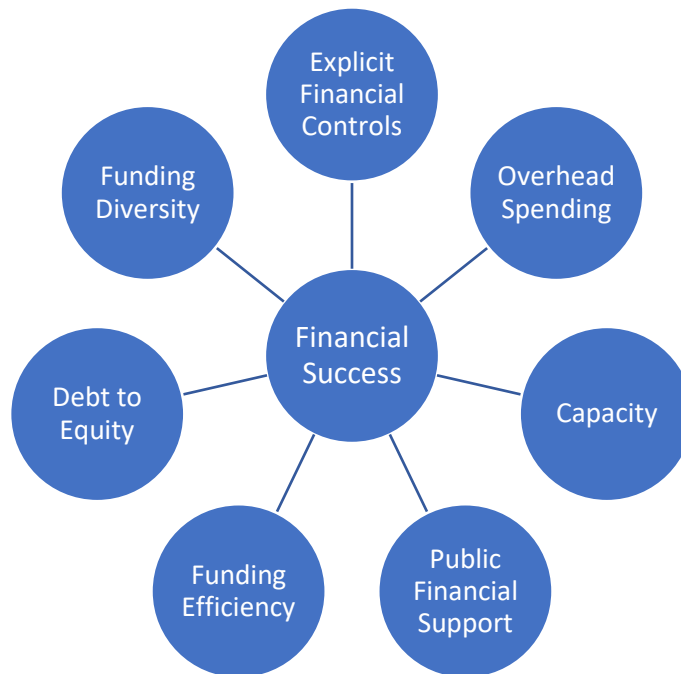
The frameworks below focus on the constructs of financial performance, clients served, and organizational resilience. Since the three constructs are closely related, the frameworks include similar variables and are distinct from one another. The proposed frameworks are intended to assist future researchers and practitioners as they develop dynamic program performance measurement systems that track performance over time. We anticipate that the frameworks can also be used to compare program outcomes between organizations and help nonprofit leaders better understand and communicate their organization's performance. In the following sub-sections, we describe each performance measurement framework, offer insights into potential ways to operationalize the framework's components, and discuss its advantages and limitations.

Financial Performance Framework

As illustrated in Figure 1, the financial performance framework consists of seven financial indicators that would allow a scholar or practitioner to gain insight into the financial success of a nonprofit human service organization. As exemplified by the fundraising diversity and overhead spending indicators, the framework highlights the importance of a variety of funding sources and a willingness to pay for fundraising and qualified leaders when measuring a nonprofit human service organization's financial success. The proposed framework also highlights the importance of measuring the number of individual donors and the organization's size through public financial support and capacity indicators. All of the financial performance framework components can be operationalized from information that most human service nonprofit organizations track. Financial capacity may be more challenging to operationalize, but

potential options include total income minus total expenses, total income, or total program service expenses.

Figure 1. A visualization of the financial performance framework



A strength of the financial framework is that it allows scholars and practitioners to create an easily operationalizable measure of organizations performance that nonprofit leaders can easily communicate to donors and clients. Most, if not all, of our proposed indicators are easily operationalized. A weakness of the financial performance measurement framework is that it is internally focused.

Client Served Performance Framework

The clients served performance framework in Figure 2 is also derived from the literature, survey data, and nonprofit resilience study. The framework predicts that size, quality, and

leaders' attitudes are associated with the number of clients served in a human service organization.

With more staff, nonprofits can serve more people. Financial capacity is also an essential component of the clients served framework since financial stability increases the number of clients served. Finally, social capital and the community characteristics where the organization works are also critical in affecting the number of clients served. Nonprofit leaders need to recognize how an organization's standing in a community and the characteristics of that community can affect the number of people willing to come to that organization for a service and impact its ability to attract donors and influence public perception surrounding their mission.

Figure 2: A visualization of the client served performance framework



While not as easy to operationalize as the financial performance framework, many of the components in the clients served framework are derived from information that most human

service nonprofit organizations track. The more conceptual variables, such as attitudes of leaders and social capital levels, may require surveying staff, clients, or community members. A weakness of this framework is that some of the components of the framework are difficult to operationalize.

Resiliency Framework

As shown in Figure 3, the resiliency framework consists of ten indicators that will allow a scholar or practitioner to gain insight into the resiliency of a nonprofit human service organization. While the financial and client served frameworks are conventional in organizational performance, the resiliency framework attempts to build a dynamic measure of performance that captures more intangible aspects of the organization.

Figure 3: A visualization of the resiliency framework



The resiliency framework adopts components from the financial and client served frameworks, including funding diversity, organizational capacity, and social capital. However, the resiliency framework also highlights the importance of longevity when measuring an organization's resilience. Indicators of longevity include the age of organizations, leadership tenure, and staff turnover. Another common theme seen in our resiliency framework is the importance of qualified and active staff and board members. Actively engaged, quality team members are more likely to have planned for unusual issues that may arise, problem-solving in real-time, and learning from previous mistakes going forward. Financial success, as indicated by an organization's ability to meet its near-term financial obligations, and capacity of an organization is also predicted to be associated with a nonprofit human service organization's resiliency.

The variables in this framework may be the hardest to operationalize. Many of the components in this framework are relatively abstract, such as staff professionalism. Scholars and practitioners attempting to operationalize this framework should search for proxy variables that could measure the indicators proposed in this framework. For staff professionalism, this could include measuring the proportion of staff with a master's degree or above or certification in their professional field. More accessible variables to operationalize are staff turnover rates and the ability to meet short term financial obligations.

A vital strength of the resiliency framework that nonprofit leaders can consider is that its indicators may be used as a marketing tool for donors. Nonprofit human service organizations can showcase their ability to survive or remain resilient, despite unforeseen external and internal issues that may occur, which is expected to increase fundraising. A weakness of this framework is the difficulty in defining resilience and at what point an organization is resilient. Like the

client served model, scholars, and practitioners should be creative when attempting to operationalize the resiliency framework.

Summary

Our review of existing frameworks in the nonprofit literature shows that nonprofit human service organizations struggle to find meaningful ways to measure performance. Many of the frameworks researchers and practitioners use are adapted from the private sector or other nonprofit subsectors (Forbes, 1998; Beamon & Balcik, 2008; Henderson et al., 2002). Most are insufficient when measuring performance. Thus, we set out to develop useful measurement frameworks that reflect nonprofit human service organizations' work. We believe the three frameworks above will be useful tools for performance measurement in financial performance, clients served, and organizational resilience.

The ability of a nonprofit leader to be transparent about their organization's performance and how they measured it is imperative to its relationship with donors and clients. Nonprofit leaders need to examine which performance measurement method aligns best with their organization's goals and values and based on their decision, evaluate how it affects donations and clientele.

The frameworks are created from an analysis of the evaluation and resiliency data of nonprofit human service organizations. While this article only provides an overview of the three frameworks' variables and constructs, we encourage and challenge nonprofit scholars to operationalize and test each model so that we may learn from one another in our efforts to advance research approaches in our field.

Conclusions

Moving forward, in research and practice, we should remain cognizant of the implications of the program performance measures utilized. Reliance on any particular framing to the expense of others can have a significant impact on other equally worthy goals of an organization. For example, over reliance on financial performance measures can force decisions to stop services to a client population, or unnecessarily increase case loads. Whereas overreliance on clients served or resiliency can be more costly. Testing of these models in future research can help further refine their efficacy in practice; thus creating opportunities to develop clear operationalizations of the some of the more abstract concepts such as staff professionalism, social capital, and attitudes of leaders. There are a variety of methodological approaches in assessing performance in human service organizations, and organizations should seek to balance programmatic goals with stakeholder and community input.

This brief exploration of the methods that human service organizations measure performance and how researchers have investigated it provides an assessment of the current practices and research in the field and will help nonprofit leaders, students, and scholars alike to evaluate their performance measures and furthers understanding of the sector.

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