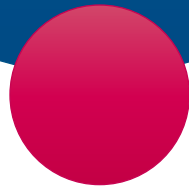


# Evaluation & Analysis of Data

## *Board Training Facilitation Guide*



### ROMA Principles & Practices for Community Action Agency Boards

Created through the Partnership's Organizational Standards Center of Excellence and funded by the Office of Community Services



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## Evaluation and Analysis of Data -- Module Description

This training segment is designed to help the Board understand the importance of the new focus on “analysis of data” in the Performance Management Framework. This is one of the key elements of the Next Generation additions to ROMA. A deep analysis of data will take special skills and education, but some basic principles of data analysis are available for anyone to use. This overview will help to set the stage for more information that can be provided to interested Board members.

There is a separate full day workshop (power point and facilitator guide) and two short recorded webinars are available at the Partnership website. Please feel free to use those materials to supplement any work you do with this brief introduction for the Board.

### Module Learning Objectives:

PARTICIPANTS WILL BE ABLE TO:

- Understand that the raw data collected for reporting must be analyzed to be useful for decision making.
- Describe the difference between evaluation and analysis of data
- Identify the Board role in reviewing the analysis of the data and the suggestions for adjustments and improvements
- Discuss the qualities of good data (accurate, complete, timely, reliable)
- Consider some questions that would be helpful to decision making
- Understand the importance of accurate targeting of agency performance
- Acknowledge actions the board must take to assure the analysis of their own agency data is done properly
- Recognize that once the data is analyzed, it may lead to new questions to be included in the next Community Assessment process.

### Material

- [ROMA Cycle, National Theory of Change, Brief list of the Organizational Standards](#)
- *Examples of “raw” agency data, any documents that include analysis of the data*

*Be sure to have sign-in sheet or other reference to those present (as in the board roll call) so you can document the training each Board member has received*

*Learner Centered Feedback should be collected at the end of each session for evaluation*

<b>Topic</b>	<b>Time</b>	<b>Slide number</b>
Introduction to the training	<i>1 minute</i>	1-3
Board roles	<i>1 minute</i>	4
Evaluation and Analysis	<i>1 minute</i>	5
Why analyze the data?	3 minutes	6-9
Questions to ask	<i>2 minutes</i>	10-11
Understanding targeting	2 minutes	12-14
Using information for decision making	3 minutes	15-18
Take Action	2 minutes	19, 20



## Slides & Facilitator Notes

### Slide 1

**Evaluation – Analysis of the Data  
for Boards**

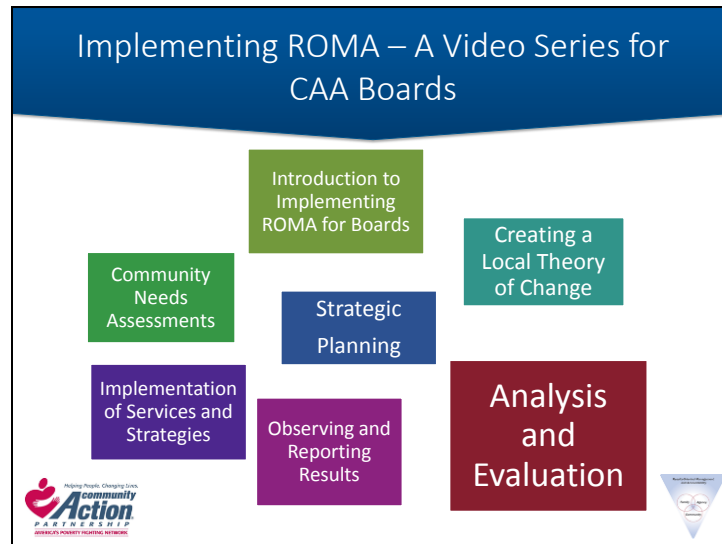
*Reviewing “what happened” and  
comparing with plans*

*A Video Series for CAA Board Members*

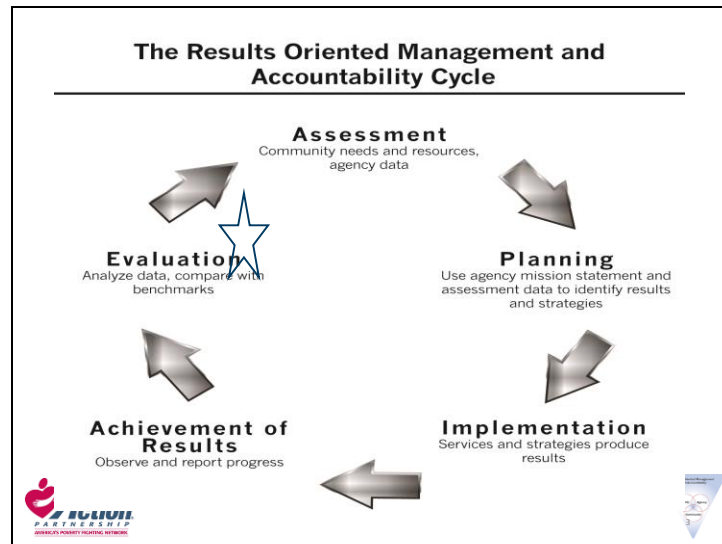
Objectives of this training will be to help the board identify:

- agency performance
  - what is working and what is not
- the “why” behind the performance



This presentation is a part of a series that is intended for Community Action Agency Board Members interested in deeper understanding of

- How to help your Community Action Agency increase its capacity and its results.
- How to meet and exceed Organizational Standards



The next phase of the ROMA Cycle we will explore is that of Evaluation – which for our purposes is about the analysis of data and comparison of actual results with benchmarks.

The organizational standard related to this:

**Standard 9.3**

The organization has presented to the governing board for review or action, at least within the past 12 months, **an analysis of the agency’s outcomes and any operational or strategic program adjustments and improvements identified as necessary.**

Another standard that is a part of this process is



**Standard 6.5**

The governing board (or advisory body) has received an update(s) on progress meeting the goals of the strategic plan (or comparable planning document) within the past 12 months.

These periodic updates provide opportunity for ongoing evaluation and analysis of the agency’s progress.

## Board Roles

- “**At least each year**, the board will receive the agency’s analysis of:
  - *Outcomes*
  - *Operational or strategic performance*
- And will be presented with any suggestions for adjustments and improvements that staff have identified as necessary.”



The Board is to get a report that includes both the outcomes the agency achieved and the context in which these outcomes occurred. (Such as the operational and strategic information that produced results or lack of results)

So the board should not just accept a report that says (for example) “300 individuals got jobs” – but they would also be wanting to know “how did we help those individuals get those jobs?” That would be part of **the analysis**.

It is not necessary for the Board to be involved in **the actual analysis** – but they must make sure that there is a process in place that includes staff or consultants with sufficient knowledge and skill to do the work. Likewise, the Board will not be responsible for the “suggestions for adjustments and improvements” but they will want to know who is involved in the analysis process that leads to the suggestions.

The Board may have members who are interested in this kind of work, and may participate in a committee designed to aggregate and sort data, consider possible suggestions, etc.

Once the data is analyzed, the committee or team or lead staff person will create some suggestions that could lead to improvements (or to maintaining successful programs). **The Board IS responsible for considering these suggestions and making necessary decisions.**



## What Do We Mean By Evaluation and Analysis?

Evaluation is about looking back to see if we did what we thought we would do.

- Evaluation helps us consider the outcome or the value of what is being reviewed using established criteria.
  - The ROMA Cycle includes: “Compare with benchmarks”

Additionally this includes “Analysis” of the data:

- **Analysis** the process of breaking a complex topic into its parts to get a better understanding of it.
- It turns the raw data into **information**.
- Analysis is **ongoing**, throughout the entire ROMA Cycle



**Evaluation** happens at the end:

- after the program, service or strategy is completed
- once the plan has been implemented
- after the reports are compiled and submitted.

It is about comparing the work with “criteria” or “a set of standards” – and in our network we use the benchmarks we have set for ourselves to see how well we have done.

**In other words, the plans you set for yourself have included the criteria that you will now use to judge how well you have done.**

**Analysis** is ongoing throughout the entire ROMA Cycle.



It is a careful in-depth study of something **to learn about its parts**, what they do, and how they are related to each other;

It helps to form an explanation of the nature and **meaning** of something.

**Why Analysis of Data Is Important**

**Analysis of the data is how we learn**

- It is **how we understand**:
  - *What we are doing*
  - *Why we are doing it*
  - *How well we are doing it*
  - *And what is happening*
- Analysis of our data helps to **identify the decisions** you need to make and **provides the information needed** for decision making
  - Doing data analysis is bound to cause you to discover that at least some of what you thought just isn't so – which means you may have to change your approach or do some things differently

As a board member you are not going to be engaged in the actual data collection or measurement processes which we discussed in the last segment, or in the actual analysis process (as we just mentioned in this segment).

But, as we have said previously, you must understand what the processes are and why they are important.

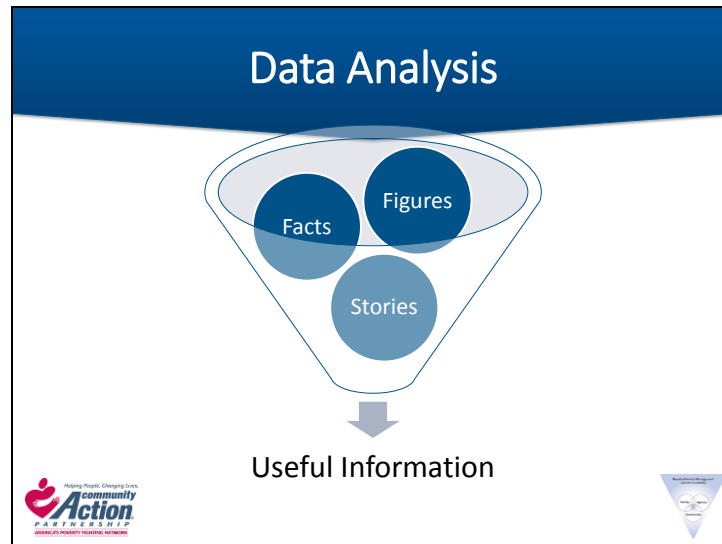
Remember: If your agency is to be data centric - as expected of Next Generation agencies - **the culture that fosters this approach has to start with the Board**. You have to demonstrate an **interest in and a value of** the analysis of your agency data (beyond just Reporting) – and understand that you will **use the analysis of the data for decision making going forward**.

Because the Board is receiving regular updates about progress toward meeting the agency's goals, this is the way you find out if the goals are being met and if they are met in the projected time frame.

And this will let you **identify the decisions** that are needed as you go forward:  
Are changes needed? Is additional support needed for a successful program? Is a program not performing or no longer necessary?

Once you identify the decisions you need to make, the data will help you **make those decisions** based on reality not on personal beliefs or feelings.



Slide 7



The analysis process produces **useful information** -- suggesting conclusions and supporting decision-making.

### Prepare for Data Analysis

- Assure the data is complete, accurate, reliable, and timely
- Identify questions you have that the analysis of the data can answer
- Aggregated the data into meaningful categories so it is easier to understand the relationships

It is up to the Board to understand what is meant by “good” data and know if the agency is able to produce it. Is the agency collecting data that is complete, accurate, reliable and timely? This is important because if the data is flawed, you may come up with incorrect conclusions in your analysis. That is a waste of time and can produce errors in future actions that waste other resources.

Remember these standards:

**Standard 9.1-** The organization has a system or systems in place to track and report client demographics and services customers receive.

**Standard 9.2-** The organization has a system or systems in place to track family, agency, and/or community outcomes.



**“Aggregation” means to bring things together.**

In the case of agency data, the Board will want to know how the agency is able to bring together all the data related to one program (participant demographics, service units and outcomes for example) or bring all the data related to participants (age, location, family type, etc) from all the agency programs.

Aggregation can also bring together “facts” and observations (experiences, stories) to see the whole picture. How does the agency do this kind of aggregation? Is it clear to the Board how this is being done?

## Understand Data Specified by a Funding Source


- Sometimes the source of your funding **gives you an outcome** you are to achieve with their funds AND a target that you are expected to hit (number to be served, and number to achieve the specified outcome).
  - This can be good news, because it is easy to determine what you are expected to do.
  - It may be bad news if the imposed target is difficult to hit
  - It may distract you from other outcomes that you want to track.



Yes it is important to understand the need for data related to this kind of outcome. However, one of the limitations of having funding source targets is that it can create a mental barrier – preventing you from seeing what other outcomes could be tracked (in addition to those required).



You want to be sure the agency is seeing how ALL your services fit together to produce outcomes that move individuals, families and communities toward agency identified outcomes. Remember in the Local TOC discussion the difference between looking at each program separately and bringing them together for common goals? You are encouraged to have a WHOLE AGENCY approach, which will include funder imposed targets within your larger understanding of the “targets” you want to achieve.

Be sure you understand the difference between outcomes that are specified by a funding source and the “big picture” agency outcomes you have identified in your own local Theory of Change.



The most important first step in making meaning from the data



**ASKING THE RIGHT QUESTIONS**



The illustration at the top shows several hands pointing at various data visualizations on computer monitors. The monitors display bar charts, pie charts, and line graphs. Above the monitors, a network diagram with nodes and connecting lines is visible, with hands pointing to specific nodes. The text below the illustration reads "The most important first step in making meaning from the data" in a dark blue font, followed by "ASKING THE RIGHT QUESTIONS" in a bold, red font. At the bottom left is the logo for Community Action Partnership, which includes a red heart icon and the text "Helping People. Changing Lives. community Action PARTNERSHIP AMERICA'S POVERTY FIGHTING NETWORK". At the bottom right is a small, light blue logo featuring a stylized face.

## Some Questions You Want To Answer With Your Data

- Did we do what we thought we would do?
- Did we serve the population we thought we would serve?
- Did we make an impact on the identified needs?
- Can we tell what services (or set of services) produced the best opportunity for results?
- Are some populations achieving outcomes at different rates than others?
- Did we recruit and enroll sufficient numbers to allow us to achieve our target outcomes?
- Do we need additional resources?
- Was there something unexpected that influenced the outcomes?



These are questions that the Board may want to have answered. They are “big picture” questions, not about specific services or programs, but about the value of the agency as a whole.



Not Accurate  
Not Precise

Accurate  
Not Precise

Not Accurate  
Precise

Accurate  
Precise

**How close did we come to our projections?**

*The relationship between the number of outcomes you projected and the number you actually achieved can be stated as a percent that shows your agency's targeting ability.*

**ABILITY TO TARGET**



We talked about the importance of **setting targets** during Implementation. Now we want to consider what the percent of targeting success means.

## In the Reporting Section we made these comparisons

Projected Indicators	Actual Indicators
40 out of 60 students participating in our afterschool program (or 66%) will improve their grades by the end of the school year	35 out of 55 students who actually participated in our afterschool program (or 64%) improved their grades by the end of the school year
15 out of 30 participants in the job training program (50%) will secure a job within 30 days of completing the training	20 out of 30 participants who actually completed the job training program (66%) secured a job within 30 days of completing the training
90 out of 100 families receiving rental assistance (90%) will maintain housing for 90 days	80 out of 100 families who actually received rental assistance (80%) maintained housing for 90 days



How well did we target?



## Calculating Targeting Ability

We calculate ability to target (or project) our performance by dividing the number that actually achieved an outcome by the number we thought would achieve.

- In our after school program, **35 actually improved grades**. We divide 35 by the number that we **projected which was 40**.  
35 divided by 40 = 87.5% success rate for our ability to target performance.




This percent will allow you to analyze how successfully you can project your performance. This calculation is a part of the Annual Report – it is auto calculated in the report, using the information that is entered.

The success rate is something to consider as you are setting targets in your next Planning Phase. It is expected that your success rate will be between 80% and 120% - giving a plus or minus 20% as a range within which you are expected to operate. What does it mean to over or underestimate your performance?

*If you are over estimating, you may need to follow up to see what additional barriers are preventing achievement of outcomes. Or you may find that you have not served as many people as you thought you would and so that impacts your outcomes. (Note: be careful that you don't include the number served in this calculation as it is just about the relationship between projected and actual outcomes)*



*It may look like the 133% success in the jobs program is better than the success in the other two programs. But notice that it is over the 120% guideline. This means that you are under estimating your performance. Some say you are "low balling" your expectations so it will look like you are doing better than projected. This, however, also demonstrates that you do not know what your services will produce; that you have not paid attention to some aspect of the programming that would impact on your outcomes.*

There is always a way to explain differences in target and actual performance. If you got more people jobs, maybe there was a new business in town that needed employees. If you got fewer jobs, maybe you lost a business and the job market was flooded with people who were displaced.



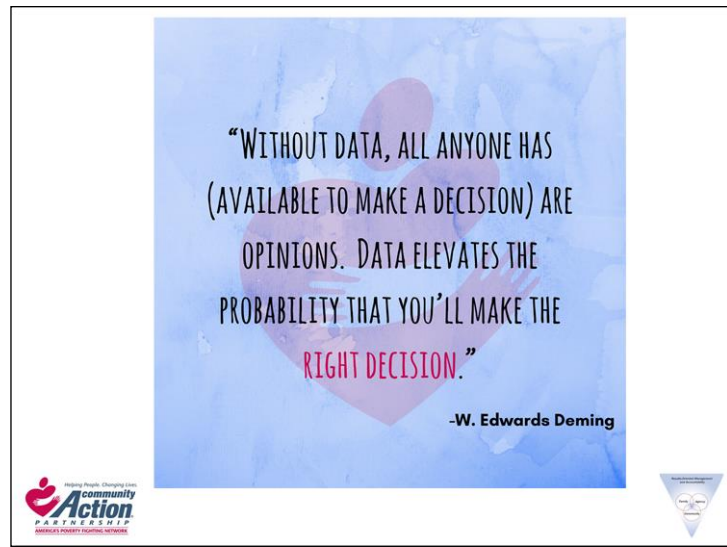
*The analysis of your data should lead to your agency maintaining or improving quality services and producing outcomes*

**USING INFORMATION FROM DATA ANALYSIS TO MAKE DECISIONS**

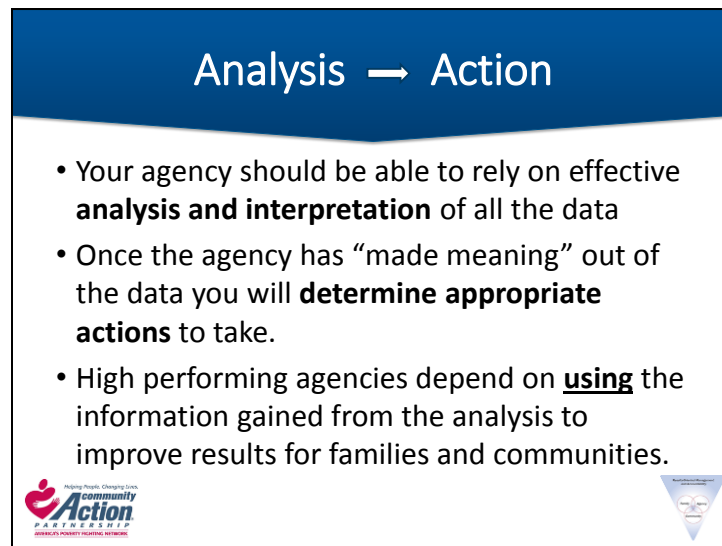
 

Of course you will want to use the information you have developed to improve your knowledge about the issue.

What caused the trend to turn? What else do you need to know?





Too many times decisions are made based on “gut reactions” or opinions that are not grounded in any facts. In these cases, we cannot be sure that we are making the right decisions. When we are responsible for decisions related to an entire community, we must have a way to “back up” our decisions.



**Analysis → Action**

- Your agency should be able to rely on effective **analysis and interpretation** of all the data
- Once the agency has “made meaning” out of the data you will **determine appropriate actions** to take.
- High performing agencies depend on **using** the information gained from the analysis to improve results for families and communities.

Data must be turned into information to support decision making -- every day in every decision at the operational level


For the Board, long term strategic decisions should be based on the analysis of facts that can be sourced back to **reliable and accessible data**.

It is the application of this analysis to the agency’s actions that will improve service delivery, the management of programs and services and produce better results for families and their communities

The actions that result from the analysis of the data are found throughout the phases of the ROMA cycle

**Find Out**

- What services produced the outcomes/results?**
  - One? More than one?
  - How can we track the multiple services connected to each customer?
- Who achieved the results?**
  - What was the age, income level and income source of those who achieved? What about education level? etc.
- Did the individuals who achieved one outcome achieved any others? How many individuals achieved multiple outcomes?**





Connecting the people to the services to the outcomes is what ROMA Next Generation is all about.

We have to know if what we are doing is addressing the identified needs in the community and if the people we serve are better off!

## Continuing the Cycle

**Think about your next Community Needs Assessment** (To get answers questions raised in the analysis process)

- What data do you want to collect that you haven't collected before?
- Was anything missing from your previous data collection efforts?
- Do you want to gather data from additional people?
- Other thoughts.....



Once the data is analyzed and some decisions are made, this should lead back into the Assessment phase of the cycle.

The information you have identified should help you look at the way you do assessment of needs.

What else do you want to know?

Are you getting enough of the right data? (Maybe there are data elements you previously included in the CNA that you do not need?)

## Taking Action

- Get **reports that aggregate information** in useful ways.
- Assure there is a **system for analysis** of the data and a way to “make meaning” about what is working
- **Compare** the projected indicators with the actual indicators to understand what happened.
- **Make decisions** base on the analysis of the data.
- Put decisions into **action**
- Decide **what else you need to know** in the next Community Needs Assessment process



## Contact Information

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