

Our Movement. Our Moment.

#NAMIcon19



**2019 NAMI
National
Convention**

JUNE 19–22 • SEATTLE

Measuring Impact: Begin at the Beginning

Heidi Guglielmino

NAMI, Director of Data Integration

About the Presenter

- Heidi Guglielmino, NAMI, Director of Data Integration
- I've lived in seven different countries
- I eat my M&Ms and jelly beans in color order.
(Actually, given that I work with data, the M&M thing isn't all that surprising.)





What this Session is NOT About

**Showing you how to develop an
Excel spreadsheet
with**

**numbers you can't really track
and can't be sure of,**

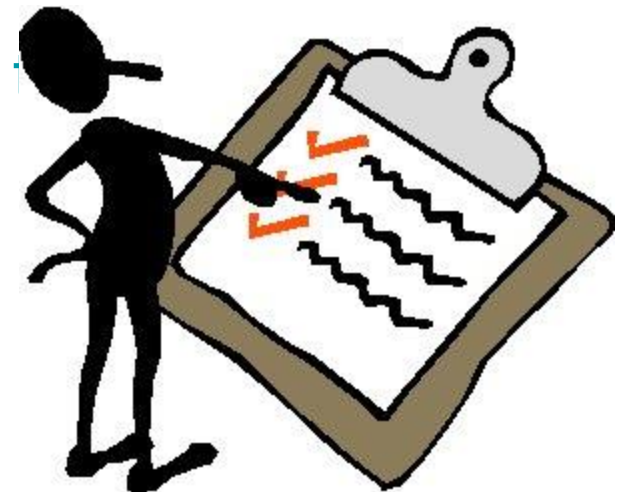
**but that
meet the “benchmarks”**



What this Session IS About

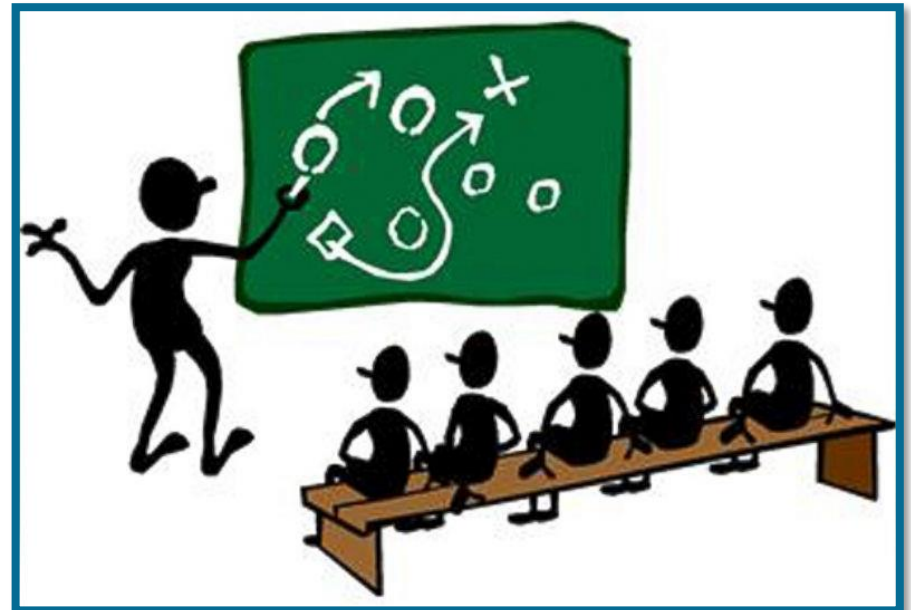
Demonstrating a tool that will help you:

- Define what you hope to change, create or build through your work,
- Agree on a goal(s) with your partner and, maybe
- Change the status quo



What We're Doing Together

- What is impact?
- What do you measure?
- Examples from the National Office
- Try it for yourself
- Debrief
- What's next



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What is Impact?



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There are so many stories! How to do them justice?

Fundraising *Volunteers*

Mission **Membership**
Programs

NAMI Walks

Advocacy

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Connecting the stories

“NAMI envisions a world where all people affected by mental illness live healthy, fulfilling lives supported by a community that cares.”

Four simple questions:

1. **Who** is the work for?
2. **What** need will be filled/problem solved/opportunity created?
3. **What change** are we trying to make?
4. **How** will we know?



Defining Impact and Supporting High Level Planning at the NAMI National Office

This process has been in use since January

Teams are answering the Four Questions for :

- All new large scale projects or initiatives starting in 2019
- The 2019 Organizational Goals that support the current Strategic Plan

Identifying Connections across all levels of the Alliance

An expanded Four Questions process is in use with the Alignment Project:

- The Lovell Foundation is funding the pilot project
- Exploring how to connecting Direct Mail, HelpLine operations and Advocacy efforts
- NAMI Kansas, NAMI Washington and a number of their affiliates, working with the National Office



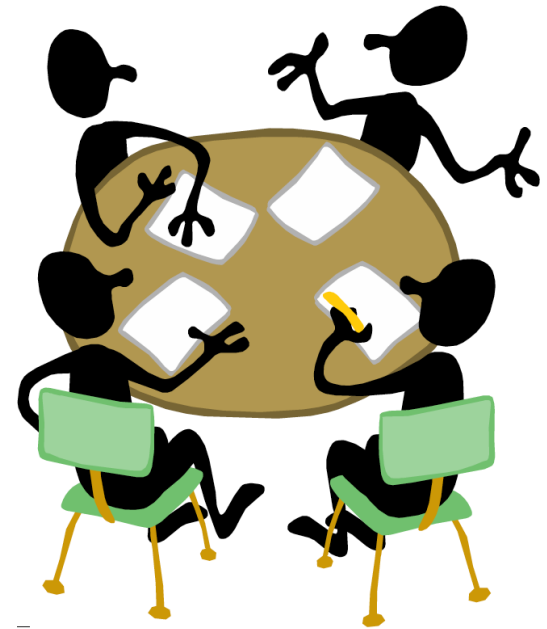
By Individual Teams

The National Office Salesforce Team used the Four Questions to determine:

- How to engage with Convention attendees at the NAMI 360 booth in the Exhibit Hall
- The appropriate audience and content for the NAMI 360 101 session on Saturday

Try It Out!

- Divide the room into 4 quadrants, each gets a different topic
- Work in groups of 3-4
- **Topics:**
 - A local fundraising initiative
 - A targeted advocacy campaign
 - Continuity of operations
 - Consistency of communications
- **15 minutes** and then we'll reconvene



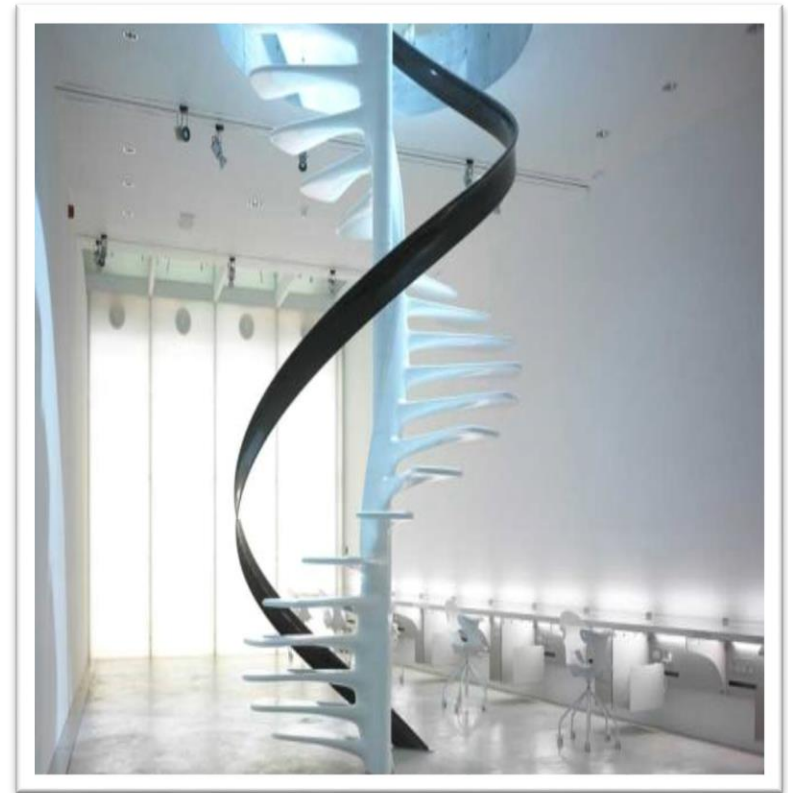
Practice Debrief

- 5 minutes for each topic to report
- **Answer the four questions, AND**
- Tell us how you'd use this back home
- *Take a photo of your worksheet on your phone to capture your input*



When to Use the Process?

- Before the beginning, when you're considering starting
- At the beginning – lay out what everyone's working towards
- When the situation changes
- At the end of a time frame, a key task, or of the initiative



What Comes Next?

- Should you proceed with the project?
- How do your answers affect current plans?
- Are you on track, or do you need to change anything?
- Can you connect this work to other work you're doing?



Back to the beginning

AUDIENCE: Board of Directors

OBJECTIVE: Strategic Drivers

Result	2018 Target	Q1 Actual	Q2 Actual	Q3 Actual	Q4 Actual	2018 YTD Actual	% to FY18 Goal
No one suffers alone: 15% Increase in Helpline calls	2,000	275				275	14%
Decrease in stigma: 10% increase in Social media FB Likes	3000	1500				1500	50%
Leverage Technology: all affiliates share website host	15	2				2	13%

OBJECTIVE: Increase in Signature programs offered

Result	2018 Target	Q1 Actual	Q2 Actual	Q3 Actual	Q4 Actual	2018 YTD Actual	% to FY18 Goal
Number of Classes offered	12	2				2	17%
Number of Presentations	120	50				50	42%
Number of Support group sessions	24	1				1	4%

Key	Celebrate	Watch	Act
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One step (or person) at a time

- I gave a presentation last year on data dashboards.
- Too detailed, & a **COMPLICATED** learning exercise
- Most didn't get what they expected (**thanks for the honest feedback!**)
- An attendee contacted me later - that they got some ideas they could use right away
- So, please let me know if this approach is helpful.

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Questions?



Additional resources

You may find the following books useful if you want to dig deeper into outcome measurement:

Program Evaluation Resources

The University of Wisconsin Division of Extension Service has developed some excellent resources to help groups plan and evaluate programs. You can reach them using this link:

<https://fyi.extension.wisc.edu/programdevelopment/planning-programs/>

Many recent articles and guidebooks about program planning and evaluation refer back to one of the original handbooks developed by the United Way: *Measuring Program Outcomes: A Practical Approach*

You can access a pdf of the handbook here: <https://digitalcommons.unomaha.edu/slceeval/47/>

Outcome Definition Resources

Many organizations outside of the program evaluation space are wrestling with the same issues. These to recent books on the topic from the business world are extremely useful in framing the problem

Godin, S. (2018) *This Is Marketing: You Can't Be Seen Until You Learn To See*. New York, NY: Portfolio/Penguin

Doerr, J. (2018) *Measure What Matters*. New York, NY: Portfolio/Penguin

Project Management Institute, Inc. (2017) *Agile Practice Guide* Newtown Square, PA: Project Management Institute – particularly the sections that cover project charters.

Resources to help define benchmarks

- **Commonly used sources of secondary data** (Note: These are general sources, but they be used to help identify more specific sources)
 - Your internal records – databases, registration files, Salesforce, etc.
 - U.S. Bureau of the Census
 - Federal budget and federal agency budgets
 - Government Accountability Office reports
 - State statistical abstracts
 - State budgets or state agency budgets
 - Book of the States series
 - PEW General Social Survey
 - PEW subject specific datasets, including Center of the States
- American National Election survey
- Roper or Gallup polls
- Encyclopedias
- Urban Institute publications
- National Center for Charitable Statistics
- Inter University Consortium for Political Science research
- United Way – Local level data
- National Conference of State Legislatures
- National Governor’s Association
- National Association of Counties

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Thank You!

Have more questions?

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