**Assignment Unit 2: Proposal for Formal Research Report**

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To: Dr. Erika Patterson

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Subject: *Improving Program Tracking and Reporting at the Daniel Centers*

**Introduction**

The Daniel Centers for Progressive Judaism is a non-profit organization that includes three centers in Tel Aviv-Jaffa, Israel. Each center provides educational, social, and spiritual programming for its community. The main center, Beit Daniel, is where most of the programming, management, and support staff are based. Several large programs require fundraising; each one has a program manager.

There is one Resource Development and External Relations (RD/ER) Coordinator on staff (that’s me) who is tasked with transmitting information about the organization and its activities to supporters and donors (in English), using multiple platforms. The RD/ER Coordinator also writes grant proposals and reports that require current program information. The coordinator needs information on the following: participation numbers, budgets, participant feedback, personal stories related to program impact, and photos. The coordinator works independently, and rarely participates in programming meetings and decision making.

There is no uniform system at the Daniel Centers for tracking (recording) and sharing program information between the program managers and the RD/ER coordinator; this results in weaker messaging for promotional materials, and less persuasive grant proposals and reports.

The audience for the formal research report will be program managers and the Daniel Centers’ General Manager. They understand the need for a set system for tracking, evaluating, and sharing information, but have limited time and motivation for additional administrative tasks.

**Statement of Problem**

There is no set system for sharing program information between the program managers and the RD/ER coordinator at the Daniel Centers. This affects the ability of the coordinator to effectively communicate the Daniel Centers’ efforts and impact to international supporters and donors. This also results in less persuasive arguments in grant proposals and weaker grant reports.

Before grants and reports are submitted, the coordinator meets with program managers to discuss any changes or proposed changes, participation numbers, and any interesting anecdotes; usually, these meetings only occur 2-3 times per year for each program. This arrangement is insufficient to effectively share information in a timely way.

**Description of Solution**

The solution needs to be both efficient and a good fit for non-profit employees that are often overstretched (overworked and underpaid).

A possible solution that would provide the RD/ER coordinator with regular updates would include:

* a spreadsheet to track measurements for each program, including participation numbers, number of events, program changes, etc.
* monthly Watsapp messages/emails sent from the coordinator to each program manager requesting photos, participant feedback (often sent to program mangers by email), updates on any changes, etc.
* periodic meetings, either monthly or quarterly, between the coordinator and each program manager.
* a system for evaluating programing based on measurements, participant surveys, and interviews.

**Scope**

To examine the most efficient methods for program tracking and information sharing, I plan to examine eight areas of inquiry:

1. How do program managers at the Daniel Centers evaluate their programs?
2. Has a tracking and reporting system ever been in place at the Daniel Centers?
3. Which methods do other non-profits use?
4. How have other RD/ER professionals proposed changes to program managers at other organizations?
5. Which applications can be used for compiling data and information sharing?
6. What do the program managers think about the need to implement a better system?
7. Which applications do the program managers currently use that can also be used for tracking?
8. What investment of time is required to implement the system for the RD/ER coordinator and program managers?

**Methods**

Primary sources will include interviews with each program manager to understand:

1. How they track their data and how information was shared in the past.
2. Which applications they currently use to communicate with participants and others (i.e. email, social media platforms, Watsapp).
3. What they think we could do differently to be more efficient.

Additional primary sources will be to conduct surveys and interviews with other non-profit and for-profit professionals. I can do this in two ways:

* Facebook group discussions: I am a member of an international group of non-profit professionals, and a group that is specifically for English speaking non-profit professionals in Israel. I am also a member of a group for female English-speaking professionals in Israel, where I can learn how similar issues have been solved in non-profit and for-profit organizations.
* Interviews with non-profit experts.

Secondary sources will include online searches for relevant blog posts, professional websites, and other publications.

**My Qualifications**

I have been working as the RD/ER coordinator at the Daniel Centers for the past year. I have built positive working relationships with management and programming staff. I am familiar with the current procedure and the challenges of limited time and finances. I am perfectly positioned to do this research, to suggest changes, and to implement them. I also have professional contacts that I can gather insight from.

**Conclusion**

Timely sharing of programming information is essential for a non-profit organization to effectively promote its work, communicate impact, and to write grant proposals and reports. There is no clear system in place at the Daniel Centers; this results in a lack of awareness of our efforts, weaker arguments in grant applications, and insufficient information in grant reports. With the areas of inquiry mentioned above, I can develop and implement a system that will be cost-effective, efficient, and easy to use.