**Comparative & Feasibility Analysis**

**for Improving Program Tracking**

**and Reporting**

**at the Daniel Centers**

for

Efrat Kochava-Weiss

General Manager

The Daniel Centers

Tel Aviv-Jaffa, Israel

by

Erica Friedman

Resource Development and External Relations Coordinator

March 15, 2019

Table of Contents

Abstract……………………………………………………………………………………………………iii

Introduction………………………………………………………………………………………………..1

Data Section………………………………………………………………………………………………2

 Program Tracking and Information Sharing at Nonprofits

 *Program Tracking*

 *Information Sharing*

Methods Commonly Used by Nonprofits

 *Low-tech Solutions*

 *Comprehensive Applications for Program Management*

Current System at the Daniel Centers

 *Shared Server*

 *Sharing Program Information*

 *Methodology for Program Tracking*

Considerations Before Adopting New Methods

 *Challenges*

 *Resources and Technical Readiness*

Conclusion

 Summary and Interpretation of Findings

 Recommendations

References

Figures and Tables

 Figure 1 Figure 1 Program Development and Intended Results

 Table 1 Comparison of the Top 3 Comprehensive Applications with Low-Tech

**Introduction**

In order for a nonprofit to remain relevant and attractive to potential funders, nonprofits must show a high level of professionalism and accountability. Foundations, government agencies, and private donors are increasingly expecting the organizations that they support to measure their impact on the people they serve, and on wider society. To successfully meet this demand, nonprofit leaders can ensure that their employees have the necessary tools and training to record and analyze program information. Additionally, collaboration and routine communication must be encouraged between the different divisions in the organization.

There are four main programming departments at the Daniel Centers; there are three program managers. There is one Resource Development and External Relations (RD/ER) Coordinator. The RD/ER Coordinator is tasked with raising awareness of the organization, and its activities, to supporters and donors. The RD/ER Coordinator also writes grant proposals and reports that require updated program information including: participation numbers, budgets, participant feedback, (participant) personal stories, and photos. The RD/ER Coordinator works independently, and rarely participates in programming meetings and decision making.

A uniform system for tracking programs and sharing information between the program managers and the RD/ER Coordinator has not yet been implemented at the Daniel Centers. If the Daniel Centers had an accepted system for sharing program information between the program managers and the RD/ER Coordinator, the RD/ER Coordinator could communicate the Daniel Centers’ efforts and impact to international supporters and donors more effectively. A suitable system would fit the culture, needs and resources of the organization. A suitable solution would be efficient, low-cost, and require limited training. The report concludes with a recommendation to implement an organizational calendar; set brief monthly meetings between each program manager and the RD/ER Coordinator; set bi-monthly reminders for participant photos/feedback; and optimize applications and programs that are currently used by Daniel Center staff.

The report includes an analysis of (1) the information that needs to be tracked and shared between program managers and the RD/ER Coordinator, (2) methods that are currently being used in the nonprofit sector to improve program tracking and information sharing, (3) the current system in place at the Daniel Centers, and (4) considerations before adopting new methods. Methods included interviews with external nonprofit professionals and Daniel Centers program managers; research in Facebook groups for nonprofit professionals; and, nonprofit blogs and professional websites.

**Data Section**

**Program Tracking and Information Sharing at Nonprofits**

Proper program tracking and information sharing are critical to nonprofit organizations. Effective communication of the organization’s programing goals, reach, and impact results in increased awareness, funding and partnership opportunities.

**Program tracking.** A program needs to be evaluated for its ability to meet its goals and to measure its impact. Best practices for nonprofits include periodic review of programs for their success and areas for improvement. Information that should be tracked include:

* Inputs: resources used; associated budget details
* Activities: What are they? How many are there?
* Outputs: frequency, length, number of participants
* Outcomes: participant feedback, personal stories, photos/videos
* Impact: directly aligns with an organization’s mission

Outputs, outcomes and impact are projected in the program’s goals. During periodic evaluations, or at the conclusion of the program, the actual measures are compared with the intended goals (Figure 1).



**Figure 1 Program Development and Intended Results**

Source: W.K. Kellogg Foundation, Logic Model Development Guide, p. 3.

**Information sharing.** Nonprofit program managers are often not involved in fundraising, developing strategic relationships/partnerships with other organizations, or raising program awareness.

These tasks are the responsibility of the RD/ER Coordinator. Routine communication between program managers and the RD/ER Coordinator is critical for a nonprofit to effectively reach its organization goals and further its mission.

**Methods Commonly Used by Nonprofits**

An analysis of methods and applications currently used in the sector was conducted. Research methods included informational interviews with external nonprofit professionals, discussions in Facebook groups for nonprofit professionals, and other secondary sources. Efforts were made to seek input by nonprofit professionals in Israel. Most sources for secondary research are US or European-based; nonprofit work culture and methodology may vary in Israel.

**Low-tech solutions.** Findings showed that many RD/ER nonprofit professionals, particularly in Israel, use a combination of low-tech options for organizing their work and communicating with program staff. Tools included: Excel worksheets, organizational calendars (Google/dry erase wall calendars), WhatsApp staff groups, shared folders, regularly set meetings with clear agendas (30-45 minutes), and reminders (Tanenbaum Daon et al.). One commenter added that its important to show appreciation for program staff when they share on-the -spot program information (Klinger).

For example: Lee Wilson, a nonprofit professional based in Israel, uses a combination of Google calendar, Excel sheets, WhatsApp, and weekly meetings to keep on top of programs. She maintains an organizational calendar (Google) with all of the programming dates. Just before an event, she receives a reminder. She sends a WhatsApp message to the appropriate program manager and reminds them to send her photos. Tasks and deadlines are recorded on Excel worksheets. She meets with program staff weekly (Wilson).

**Comprehensive applications for program management.** Many nonprofit professionals, particularly those based in the U.S. recommended program management applications that go beyond the scope of this particular analysis. Some programs include functionality for sharing files, messaging, calendars, and tracking team members’ progress. The top three recommended programs include: (1) Trello, (2) Asana, (3) Monday (Cruz et al.). Elements of the top three programs that are relevant to this analysis are:

* They can be helpful for working individually or in teams; teamwork requires that all members receive training and are willing to use the program regularly.
* Each of programs keeps track and sends reminders of important dates (i.e. proposal/report due dates, meetings, program dates, etc.). This functionality can be used to create an organizational calendar.
* Program data can be recorded and shared through file sharing.
* Application costs range from free (Trello & Asana - basic packages) to $25/month to start (Monday).

**Table 1 Comparison of the Top 3 Comprehensive Applications with Low-Tech Option**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **System** | **Training Required?** | **Suitable for Teams?** | **File Sharing** | **Organizational Calendar** | **Cost** **(Basic Package)** |
| **Trello** | Yes | Yes | Yes | Yes | Free |
| **Asana** | Yes | Yes | Yes | Yes | Free |
| **Monday** | Yes | Yes | Yes | Yes | $25/month |
| **Low-Tech** | No | No | Yes | Yes | Free |

**Current System at the Daniel Centers**

Program managers at the Daniel Centers track their program outputs; each according to their preferred method. Following is a survey of the current system. Research was compiled through informational interviews with each of the program managers and through my personal experience as the RD/ER Coordinator.

**Shared Server.** All computers at the Daniel Centers are connected to a network; with each employee having their own folder that can, in most cases, be accessed by all employees. Program files are kept in the program manager’s folder. The network also includes a shared folder for photos that is organized by year, and then further organized by programs/events for that year. Some program managers also save photos to their program folders.

**Sharing program information.** The program managers meet with the RD/ER Coordinator before grant proposals and reports are submitted; they discuss program development, activities, outputs, outcomes, and projected goals. Typically, these meetings occur 2-3 times per year for each program, at the request of the RD/ER Coordinator.

**Methodology for program tracking.** Although there is currently no uniform system for recording program information, interviews with each of the three program managers yielded some common findings:

* All of the program managers accurately track participation numbers for most events. Exceptions are when an event involves hundreds of people and doesn’t require advance registration. In those cases, participation numbers are estimated.
* All program managers use Excel to record program data and track budgets.
* In most cases, photos and videos are saved in the network’s shared photo folder. 2/3 program managers sometimes save photos in the program folders.
* Sometimes participants/volunteers send photos by WhatsApp or email; they are not always saved to the network’s photos folder.
* Participant feedback is mostly verbal, or received by email, WhatsApp, or posted on the organization’s Facebook page. The program managers don’t have a system for recording feedback.
* 2/3 program managers use Outlook calendar, the other uses Google Calendar.

The data illustrates that although not institutionalized, there is an organic system in place for recording programing information at the Daniel Centers. There is no consensus on how the information could be more easily organized and shared.

**Considerations Before Adopting New Methods**

Change is difficult for any organization, whether for-profit or nonprofit. Nonprofit organizations often face additional challenges when trying to implement change.

**Challenges.** Research indicated several challenges that nonprofits face when trying to implement new information and communication systems, such as:

* Limited budgets, with a small percentage allocated to technology and training
* Limited incentive to partner between departments
* Tight schedules, especially for program staff

(Laporte et al.)

**Resources and technical readiness.** According to Emory and Molko, having systems of support and technology in place is not only best practice, it is also critical for a nonprofit’s relevance. They suggest that nonprofits:

* have information systems that accurately track data on a timely basis
* allocate sufficient resources (funds and manpower) to service systems and provide ongoing training
* employ at least one person who is responsible for monitoring, servicing, updating and backing up the system

This suggests that before an organization should implement new programing, such as an all-in-one program or new system. Resources should be available to provide training, servicing, and modifications as needed. Most importantly, to be successful all programs require leadership buy-in to advocate for the change, otherwise, staff will likely only adopt the new program with reluctance, and success is less likely (Laporte et al.).

**Conclusion**

**Summary and Overall Interpretation of Findings**

This comparative and feasibility analysis focused on identifying possible solutions to improving program tracking and information sharing between the RD/ER Coordinator and program managers at the Daniel Centers. The analysis covered the:

* types of information and why they need to be shared
* systems that are recommended by nonprofit professionals in Israel and abroad; low-tech and hi-tech options were discussed
* program tracking and information sharing systems currently used by the Daniel Centers program managers
* considerations for implementing new systems at nonprofits

Findings were based on research conducted on professional blogs and websites; Facebook groups for nonprofit professionals; and, informational interviews with program managers, the General Manager, and outside nonprofit professionals.

**Recommended New System at the Daniel Centers**

It is refreshing that the RD/ER Coordinator, program managers, and General Manager all recognize that a better system needs to be implemented. Although it is tempting to adopt a comprehensive program such as Trello, Monday or Asana, the two main challenges would be scheduling initial and ongoing training and encouraging program managers to routinely use the program. Since each program manager and the RD/ER primarily work independently, many of the applications that these programs offer wouldn’t be needed. A second issue, would be the cost of ongoing training in an organization where budgets are limited.

I recommend maximizing the programs and systems that we are currently using; this includes the following:

1. Organizational calendar (Outlook/Google) that includes:
	1. due dates for grant proposals/reports
	2. newsletters
	3. programing dates
	4. special events
	5. holidays and staff birthdays
	6. planned social media campaigns
2. Monthly check-in on grant agreements to make sure we are in compliance
3. Brief meetings (15-30 minutes) between program mangers and the RD/ER Coordinator every two weeks to discuss program updates, grant compliance, and to check if there are any recent personal stories/photos.
4. Program tracking using Excel worksheets, saved under program files on network; program managers and RD/ER Coordinator will design a sheet that includes all required measures
5. Reminders before events/programs for staff to take photos; photos to be saved under appropriate files in the shared folder
6. Brief weekly check-in between General Manager and program managers to follow-up on progress
7. Three-month follow-up to assess improvements

**References**

Cruz, Cathy et al. “I’m in need of a project planning app of some sort.” Facebook, 29 Jan. 2019, <https://www.facebook.com/groups/199465520203194/search/?query=asana&epa=SEARCH_BOX>. Accessed 25 Feb. 2019.

Klinger, Tamara. “Don’t get me started.” Facebook, 19 Dec. 2018, <https://www.facebook.com/groups/955377724534983/permalink/2412793852126689/>. Accessed 27 February 2019.

Tenenbaum Daon, Stephanie et al. “How do you receive updates about your organization’s programing?” Facebook, 19 Dec. 2019, <https://www.facebook.com/groups/955377724534983/permalink/2412793852126689/>. Accessed 27 Feb. 2019.