Comparative & Feasibility Analysis
for Improving Tracking
and Information Sharing
at the Daniel Centers

for

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Abstract

The Daniel Centers has yet to implement an organization-wide system for tracking and sharing program information between departments.

The Resource Development and External Relations (RD/ER) Coordinator is tasked with developing fundraising opportunities, and raising awareness on the organization and its activities.

If the Daniel Centers had a uniform system for tracking and sharing program information between program managers and the RD/ER coordinator, promotional materials would be more effective; and, grant proposals and reports would include greater depth, and be more persuasive. This would lead to increased funding opportunities; expansion of our programs; greater impact in our community; and, inevitably, advancement of the Daniel Centers' wider goals and mission.

This report includes an analysis of the kinds of information that need to be tracked and shared; current systems at the Daniel Centers; methods commonly used at nonprofits; and, considerations concerning implementation of new systems.

The data was gathered through informational interviews with the Daniel Centers' general and program managers, external nonprofit professionals, Facebook discussion groups for nonprofit professionals, and professional blogs and websites.

The report recommends adopting a tracking and information sharing system that is quick and easy to use, low cost, includes built-in reminders and an organization-wide schedule, and does not require additional training.

Introduction

Nonprofits must show a high level of professionalism and accountability to remain relevant and attractive to current and potential donors (Embury and Malka). Foundations, government agencies, and private donors are increasingly expecting organizations they support, to measure their impact on the people they serve, and on wider society. Ensuring that employees have the necessary tools and training to record and evaluate program information, and encouraging collaboration and routine communication between different divisions, will help to keep supporters informed and engaged (Laporte, Suzanne et al.).

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 current and potential supporters and donors. The RD/ER coordinator writes grant proposals and reports that require current program information, including: participation numbers, budgets, participant feedback and personal stories, and photos. The RD/ER coordinator works independently, and rarely participates in programming meetings.

A uniform system for tracking programs and sharing information between the program managers and the RD/ER coordinator has yet to be implemented at the Daniel Centers. If the Daniel Centers had a uniform system for sharing program information between departments, the RD/ER coordinator could communicate the Daniel Centers' efforts and impact to supporters and donors more effectively. The ideal system would fit the culture, needs and resources of the organization; and, be efficient, low-cost, and require limited training. The report concludes by recommending the implementation of an electronic organizational calendar; scheduling brief monthly meetings between each program manager and the RD/ER coordinator; scheduling bi-monthly reminders for sharing participant photos/feedback; and, optimizing applications and programs that are currently used by Daniel Center staff.

The report includes an analysis of (1) information that is tracked and shared at nonprofits; (2) methods currently being used by nonprofits to improve program tracking and information sharing; (3) the current Daniel Centers system; and (4) considerations before adopting new methods. Research methods included interviews with external nonprofit professionals and Daniel Centers program managers. Further research was conducted in Facebook groups for nonprofit professionals; and, nonprofit blogs and professional websites.

Data Section

Program Tracking and Information Sharing at Nonprofits

Accurate program tracking and efficient information sharing systems are critical to nonprofit organizations. Effective communication of the organization's programming goals, reach, and impact result in increased awareness, funding, and partnership opportunities (Embury and Malka).

Program tracking. A program is evaluated on its ability to meet its goals; and, its impact should be measurable. 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
  (W.K. Kellogg Foundation, p. 9-10)

As figure 1 illustrates, outputs, outcomes, and impact are projected in the program's goals. During periodic evaluations, or at the conclusion of the program, the <u>actual</u> measures are compared with the intended goals.
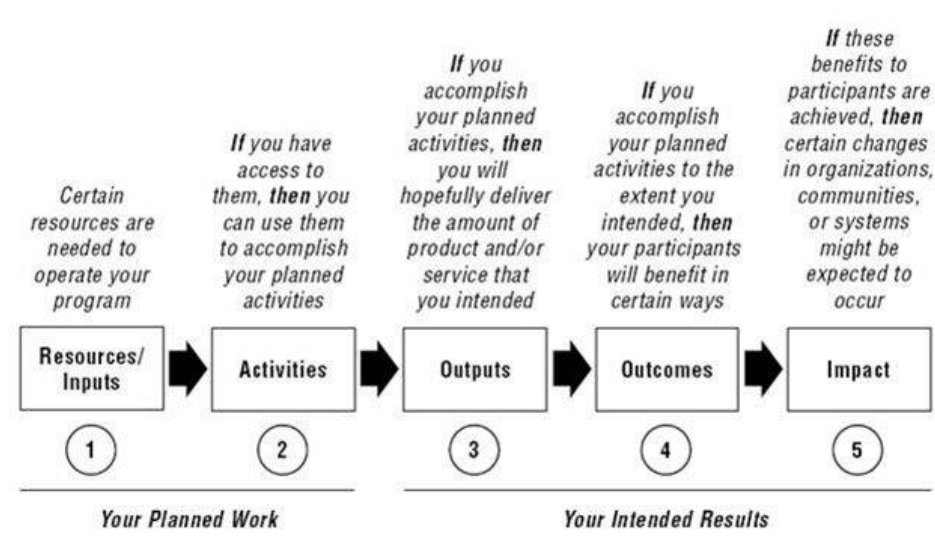

Figure 1 Program Development and Intended Results
Source: W.K. Kellogg Foundation, Logic Model Development Guide, p. 3.

Information sharing. Nonprofit program managers are typically uninvolved in fundraising, developing strategic relationships/partnerships with other organizations, or raising program awareness. These tasks are the responsibility of Resource Development and Communications Departments. Routine communication between program managers and these department(s) 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 secondary research sources 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 it's 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 functionalities 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:

- Helpful for working individually or in teams; teamwork requires that all members receive training and are willing to use the program regularly.
- Includes organizational/project calendar with built-in reminders.
- 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 includes a comparison of relevant functionalities of the top 3 recommended programs with low-tech solutions (mentioned above).

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	√	√	√	√	**Free**
Asana	√	√	√	√	**Free**
Monday	√	√	√	√	**$25/month**
Low-Tech	X	X	√	√	**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 by conducting informational interviews with each of the program managers, and through personal experiences 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 of program managers use Outlook calendar, the other uses Google Calendar.
- There is no consensus on how the information could be more easily organized and shared.
  (Levi; Saban; Yariv)

Table 2 includes a comparison of the tracking methods currently used by the program mangers at the Daniel Centers. The data illustrates that although not institutionalized, there is an organic system in place; program managers rely on the same programs, for the same functionalities.

Table 2 **Comparison of tracking methods used by program managers at the Daniel Centers**

System	Participation Tracking	Budget	Photo/Video Storage	Program Calendar	Participant Feedback
Levi	Excel	Excel	Shared Folder	Google	WhatsApp/Email/Verbal
Sadan	Excel	Excel	Shared & Program Folders	Outlook	WhatsApp/Email/Verbal
Yariv	Excel	Excel	Shared & Program Folders	Outlook	WhatsApp/Email/Verbal

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 (LaPorte et al.).

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 implements new systems, such as an all-in-one program, 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 needed, 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 at the Daniel Centers
- 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 coordinator 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.

At this stage, optimizing the programs and systems that the Daniel Centers is currently using, would be ideal. This would include implementing the following:

1) Organizational calendar (Outlook/Google) including:
    a. due dates for grant proposals/reports
    b. newsletters
    c. programing dates
    d. special events
    e. holidays and staff birthdays
    f. planned social media campaigns
2) Monthly check-ins on grant agreements to ensure 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) Tracking programs using Excel worksheets, saved in network program files; designing a sheet that can be used for all programs would be most efficient.

5) <u>Setting reminders</u> before events/programs for staff to take photos; organizing photos in the shared folders

6) <u>Brief weekly check-in</u> between the general manager and program managers

7) <u>Three-month follow-up</u> to assess improvements

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