

>> Andrew Means: Welcome and thank you so much for joining for today's virtual round table, The Data Playbook. Data Practices for Purpose Driven Work. My name is Andrew Means. I run Beyond.Uptake, a philanthropy dedicated to promoting the use of data in the social sector. Markets for Good are delighted to partner with the Charles and Lynn Schusterman Family Foundation to present today's discussion. Today, we're going to dig into the new Data Playbook. A practical guide developed by the Schusterman Foundation to help social sector organization to put data to good work. We're going to take an in-depth look at this new resource in today's chat. But be sure to visit Schusterman.org to check out the data playbook where you can learn more about best practices, strategies, and case studies using data to drive social impact. Before we get into today's discussion, let's just go over a few housekeeping details for all of our audience members out there today. Your mics are going to remain muted for the length of the discussion. But as always, we still want to hear your input, so please use the chat functionality to chime in and submit any questions you may have for the panel. We're going to try and cover as many of them as we can in our time today. We're recording and sharing out this discussion on marketsforgood.org. And the Markets for Good podcast which could be found on iTunes. And, of course, be sure to check out Markets for Good for a ton of other posts and resources about using data in the social sector. Now, for today's discussion, we have a great panel. We're joined by Jacob Harold President and CEO of GuideStar.; Beth Kanter, nonprofit innovator, master trainer, blogger, and author of *Happy, Healthy Nonprofit*; and Rella Kaplowitz, Program Officer for Evaluation and Learning at the Schusterman Family Foundation. Thank you all so much for being here and joining us today. So, we're here to talk about the Data Playbook. This new online resource that provides a step by step guide using data driven evaluation to measure and boost social impact. Let's start right at it. Rella, you were the evaluation expert at the Schusterman Foundation and author of the Data Playbook. Can you give us, just in broad strokes, an introduction to this new resource and tell us how this initiative came about? And what kind of need you were seeing out there for a resource like this and how this resource is meeting that need.

>> Rella Kaplowitz: Sure. Thanks so much for having me. So, the Data Playbook is really a data for non-data people guide. It's a practical how-to resource for any organization who are looking to step up their data game via – starting to collect a little bit of data where they haven't before. Or taking their massive amounts of data and really knowing how to tell their story. So, it's really meant for people of – and organizations of all different shapes and sizes. Where it came from is I spend a good chunk of my time at the Schusterman Foundation providing technical assistance for our grantees and partners. And the Data Playbook is really an outgrowth of that. Work – I found myself having a lot of the same conversations over and over again. And then I realized there was really a gap in the field. There are lots of great resources out for bits and pieces of being a learning organizations, but never any one-stop shop. And so, the playbook is a combination of compiling great resources that are out there

in one place. And also, creating some content in areas where there are really gaps in the field.

>> Andrew Means: You talk about being a learning organization. And I think that's a phrase we're probably going to come back to a few times today. Can you just define what that means for you and the Schusterman Foundation?

>> Rella Kaplowitz: Yeah, I mean, I think a learning organization is an organization that gathers information and learns and grows over time. So, it's a pretty simple definition for me.

>> Andrew Means: Awesome. So, Beth, you've been on the frontlines of non-profit data for years and have had a chance to dig into the playbook. Are there some particular strategies or take-aways that jump out to you as being especially relevant for non-profits to know and embrace?

>> Beth Kanter: Sure, but first, I want to say congrats on a really great resource and I think it's really – as you said – particularly useful for beginners or those who haven't – who may have heard some of the ideas or, you know, points that are in the book that they haven't totally integrated it into their practice. And they may not be trained data scientists or experienced evaluators so, you know, I was really happy to see a resource that's easy to read; it's in plain English; it's not filled with jargon; and it really has reduced the complexity of the topic. And so, for me, it's the ideal kind of how-to resource because it has a lot of step-by-steps, checklists, really good tips. And then you've done a really great job of summarizing a lot of frameworks and making them simple. And, of course, my all-time favorite section is a really good curated list of resources for, you know, somebody who wanted to take an hour to just take a deep dive and get up to speed quickly, here's the list. So, a few things that really caught my eye. First, I like the structure because it's a simple structure for working with data. You know, the what, how, meaning making, and communicating your results. And it's really funny having, you know, been in the sector for a long time and reading a lot of stuff, you say, "Oh, yeah. I know where that's from. I've seen that before. Yeah." And I actually learned a couple of things going through this. One that caught my eye was the section about goals. So, you know, being in communication, I'm really familiar with the SMART goals and logic models. But the CLEAR framework was something new to me. And I'm just, like, maybe I've been under a rock or something but I really liked it because it, kind of, guides around strategy, as well as measurement. And it was C is for collaborative; Limited – possess a defined scope and duration. E for emotional. E [sic] for appreciable. And R for refinable. So, it mixes strategy and measurement together in a really nice way. So, I'm thinking, "Hmm, checklist. I'm going to try that coming up." The other thing that I thought is really useful was the checklist of different skillsets. Not only for internal staff, you know, you might be thinking you want to improve staff skills so maybe send them off to some professional development or get some coaching in those areas. But also, often, you know, it's also good practice to hire an outside evaluator, an outside expert, or one as a volunteer. So, there was, kind of, some points

about there about the skills that you should look for and I thought that was really good. And, finally, I really liked the meaning making or the sense making section which is really quite the data analysis and this is the part that can be really scary. And it, kind of, removes the voodoo from it for beginners. And I really like the facts stats trends and how you simply took us through this. I can imagine somebody not, you know, just getting into it and was, kind of, taking that – the steps that you’ve outlined and sitting down with their data and not having their heartrate go through the roof. So, thank you. Thank you for a great resource.

>> Andrew Means: Yeah, no, I would echo that – a lot of what you just said. And I think, as I’m taking a look at the Data Playbook and – Rella and I have had a few conversations before. It does a really good job of getting people, like, what I like to call “on the ladder” of data maturity. And there’s lots of skills. There’s lots of complexities that you can learn and gain but [inaudible] is knowing where to start can be one of the most challenging things to do. And I think the Data Playbook has done a great job at – for writing a resource. For helping people know where to begin and take some early action steps. Jacob, your work at GuideStar really takes a big picture sector-wide approach to data but you’ve also worked for both non-profits and foundations – more on the front line. So, can you talk some about how data – how you’re seeing data being used both drive organizational and sector level change?

>> Jacob Harold: Sure. And, you know, even just to step back for a second, I mean, this – think about the scale that we’re talking about here. I mean, in the U.S. alone, we’re talking about a trillion dollars of the American economy. In the amount of work that’s being done by non-profits and philanthropy more broadly, it’s really quite extraordinary. And the thing is, it’s really hard work. You know, there’s a phrase that is used in military strategy, VUCA. V-U-C-A. which describes a context that it’s volatile, uncertain, complex, and ambiguous. And, I think, you know, all the folks on this call can relate to feeling like their operating in a VUCA world because the work of social change is really, really difficult. And our ability to bring data in to help us navigate that complexity – that volatility, that uncertainty, that ambiguity is so important. But, you know, building on something Beth said, it tends to raise people’s blood pressure. They just get stressed out trying to figure out how in the world am I going to bring in the right data to help me navigate all of this craziness? And so, we need tools to do that. And I think the playbook really succeeds at helping to guide people through that choose your own adventure of, you know, what am I actually going to do to bring in data to help me be more effective. And it has all these very concrete use cases, you know, but I think a classic one is just, “where’s a donor going to give money? They need some data for that.” And that one is pretty clear and that actually is what first brought me into this work. But I’ve become convinced that the most important place where data helps us create more good is at the level of – the mid-level non-profit executive. The person who is actually on the frontline and trying to figure out, you know, how am I going to use my scarce time which is often actually the most important resource for

people engaged in social change. But there is another aspect to all this which is truly at the field level. And, you know, some of that is just really helpful for us to be able to explain to Congress or explain to a journalist what the non-profit sector is all about. But I also think it's really important for us in the field as we try and have a clearer sense of identity. And I believe that the non-profit sector is in a bit of an identity crisis right now. And the more that we're able to organize data that helps us tell our own story in a way that makes sense to us, I think the better we're going to be able to understand who we are, where we've been, and where we're going.

>> Andrew Means: And what are some of the ways that you see data playing that role? Of helping the sector craft its own identity and better understand itself?

>> Jacob Harold: Well, I mean, I think one of the best challenges to present a non-profit leader is to invite them to pick the metrics that they want to be judged upon. And because that provides good data, but it also helps to clarify ones' sense of priorities and identity. And, I think, as a field we haven't done a good job of empowering people to make those choices for themselves. It's too often been imposed from the top down by a funder. Or never really demanded by anyone. That's something we're working on at GuideStar – is creating a platform we call Platinum that allows any non-profit to pick whatever metrics are appropriate to tell their own story. And it really is about telling your own story, but it's also about living your own story and being able to say, "You know what? Actually, this metric is not going up. We're doing something wrong. Let's learn from that and let's make a change. But I actually think that this identity piece is almost as important as the resource allocation or the kind of day to day decision making piece. It's really about who are we and what are we trying to do.

>> Andrew Means: You know, I think that's a really good point and well said. When I talk with organizations or I'm brought in to an organization to help them come up with a data strategy or help them understand how they can better use data to drive impact or improve their outcomes, where we often times being is what are you trying to do? Let's clarify that. How do you know that you've achieved your success? What does that look like? How does – what are the metrics around that. And so, data really can be used as a mirror to see how your own – you yourself are performing. But then also, just – almost, like, it helps you understand what it is that you're trying to doing. It's a forcing function almost. To start using data very well, you need to know something about yourself so it really draws up that conversation. And another thing that you mentioned – and Rella, I want to turn to you with some of these as well. There's this difference between having data and actually using data. You know, I think, sometimes we think that more data is inherently better. But more data doesn't necessarily mean you have more insight or you can take it at a better action. And so, Rella, how can this, you know, how are you seeing this play out? How are you seeing the difference in having data and actually using data

to drive change and especially because it involves so many parts across a given organization. Can you tell us about some of the key factors involved in building a practice and culture of data at a non-profit? And how do you – focusing on our audience today who might be intimidated by the process, [inaudible] a different change at their own work place?

>> Rella Kaplowitz: Yeah, I totally agree, Andrew, that having data is not necessarily good. Sometimes, it can be bad. You can be so inundated with data that you don't actually know what the right data is so I'm a big advocate of having a small amount of the right data than a large amount of the wrong data. In terms of how to build a data culture in your own organization, start small. This is something, you know, using data for decision making, for learning, for growing, it's a change for a lot of organizations. Organizations that are already probably using data in ways that they're not even thinking about. I mean, when you are reading stories of people that you've helped with your organization, that's data. It's not a hard number but, you know, lots of organizations already have data. I think it's just being a little more standardized or descriptive in your approach to how you're really using data to inform your work. In terms of what are the pieces – what are the factors that help organizations really use data well? Being open to testing, learning, refining, I think, is really important. I think a lot of organizations – and in my experience – focus a lot on perfection and doing things really well and failing is not an option. Failing is bad. And failing is actually a really important part of learning. There's that concept of fixed and growth mindsets. And I think that this has mostly been used to talk in reference to individuals but I think it's really true for organizations too. A growth mindset looks at obstacles and challenges and failures even as opportunities to learn and grow. And I think that that's one of the most important components in being a learning organization and using data well – is being okay with failing. Being okay with sometimes uncovering areas that you're not achieving as well as you want. But instead of using that information to be upset and sad – and certainly, from a funder perspective – instead of using that information and having punitive results – shift, learn, grow, change. You know, really use that information to do more, do better. I would say a couple of other tips. This kind of thing is really hard. So, find your change champion. Find people in the organization that buy into this idea. Fully top down and fully bottom up approaches don't really work. So, if you have a CEO who's really gung-ho on making this a data driven organization, just that one person, it's going to be really challenging. Same thing. If you're at the grown level and, you know, you really think that you're not using even the data that you have well enough, one person? It could be really challenging. So, find other people in the organization. Find those change champions. And who can really you a lot of the way. That makes a huge difference. The last thing I'll say is start small. And when I say small, I mean, really, really small. And one of the best ways to grow data and learning in your organization is to show value really quickly. I mean, once people can see even in small ways what collecting a little bit more data; collecting data a little bit better, doing a little bit of analysis, doing one

really great data visualization that drives up donation; it's amazing how one small thing that shows value can really catalyze an organization to doing more. And starting small also means that if it doesn't work right away, you haven't invested an insane amount of time and something only to have it fail and then be really dejected and just throw in the towel. So, those are some of the tips I have.

>> Andrew Means: No, those are great tips, Rella. One kind of follow up question came in from Angelica which I think is really pertinent to this conversation around champions and starting small is how do you get leadership to buy into this? How do you get leadership to value data and data analysis and give, maybe, a little space, a little encouragement, a little freedom to experiment, to fail, and to even just start small? How do you see an organization getting that buy in and finding champions and creating champions in their leadership?

>> Rella Kaplowitz: Yeah, well, it's hard. And I'll just name it. Not every organization is going to have the right structure and the right leadership and the right people to be able to, maybe, go as far as you want them to. So, I'll just name that. I think that leadership are just like any other people that are in an organization. Everyone has their own motivations, their own world view, and their own perspective. And I think that even, you know, whether you've just graduated college and you're in an entry level position or you've been the CEO of an organization for 20 years, everyone – you need to sell them. Right? You need to figure out what is somewhere where I can make this person's life easier? What is some small way that I can create efficiency? What is some small way that I can increase the number of dollars or our volunteer engagement? So, I think it's just figuring out what are the motivations that might help you sell the idea. And, again, start small. Show value and then move forward and let it snow ball.

>> Andrew Means: Absolutely. And, in fact, you've written some about the challenges that organizations might face when it comes to integrating rigorous data analysis into non-profit practice where expertise is probably fairly limited. Where there's doubts about how data might mesh with traditional storytelling. So, how are you seeing organizations integrate data – a strong data culture – with their existing storytelling under the constraint with which they operate in?

>> Beth Kanter: So, a couple of examples. So, when I saw this question, I decided to just go out and take a look again as I'm always doing. And a couple of things jumped out at me. I'm seeing a lot more data use of infographics to share data in a visually compelling format that is, kind of, storytelling. Either to support campaigns or as another way to communicate information from regular reports like an annual report. So, for example, the Humane Society of the U.S. has done a terrific job of this over the last years. I think they're early adapters of using infographics when they first became popular back in around 2011, 2012 when we were all obsessed with infographics. And now, they're not quite as sexy but more people are doing it. And so, I was just looking at their "Be Cruelty-Free" campaign which includes some cute bunnies mixed in with some

statistics on why it's important. So, it's a great way of presenting the facts to build your case in a campaign. And to do it a compelling manner. Another one comes to mind is Save the Children. They do an annual report on the state of the world's mothers every year. I think they release it on Mother's Day as part – probably part of a fund-raising effort but they do this now as an infographic. And they did a really good infographic for their recent campaign to support the children of Syria. Again, very compelling way to present data, to make a case for some sort of action like donations. The other thing I'm seeing quite a bit of are – and perhaps inspired by Zappos – are a lot maps. Okay? I don't know if you're familiar with Zappos but they have the Zappos shoe map. So, every time somebody buys a pair of shoes on Zappos, you can actually see that in real-time on the site. So, Charity Water is using a map to show data in time of their well projects across the world. So, you can actually open the map and you can zoom in on Africa and you can see where they all are. Volunteer Match actually does a rendition of the Zappos shoe map by showing every time an organization is connected with a volunteer. There's a – I think a blue hand that goes up – and it's an orange hand if somebody is on the site looking for an opportunity. And that, of course, is one of their key metrics, you know, connecting organizations with skilled volunteers. The other couple of maps that I've see that are interesting ways to present data is Impact Funders – has maps of investment in the field of media. It's connected over to the foundation center. So, you can go in and you can actually do a field level analysis of the kinds of issue areas where funders have invested in in the area of media. And then, perhaps more relevant is the Hate Map from the Southern Poverty Law Center where they're tracking incidences of hate crimes across the U.S. with different – you can see if it's white supremacy, or if it's, you know, gay hate crime, or whatever. Each one is presented with icons. You can actually see how much that's happening, and the different types, and what areas of the country. And it's eye-opening to look at.

>> Andrew Means: Awesome. And I think that's a great list. And I think too, you know, what data can often times do very well to augment and support an organizations storytelling is to provide context. A lot of the things that you're talking about are talking about seeing how our stories fit into a bigger picture. How our stories fit in with other organizations similar to ourselves and to a broader context. And, Jacob, this is something, I think, you're thinking a lot about. How organizations choose – what they choose to share about themselves. What metrics they choose to look at. And you've talked about this, written about this, the nuances of choosing the right metrics. And how it falls to non-profits to really get that right. So, can you tell us some about the opportunities and challenges presented by the process of choosing your own metrics? And how social sector organizations might use GuideStar and other resources to help benchmark and communicate the metrics that are right for them?

>> Jacob Harold: Yeah, [Inaudible] this is a live question for the field, for GuideStar, and I know, for many organizations. I think it's worth – let me start

with an example. Just to get some language clear because I think – otherwise, we can get overwhelmed by the different types of metrics. So, imagine a job training program that serves hard to employ people. Perhaps folks who are just coming out of prison. And think about – there as a chain of steps that lead from the resources that organization gets to the results that they want to see in the world. So, the first step or what are the inputs into their process? It might be volunteer hours. Or dollars coming from donors. Maybe donations of free space to hold a training. Then there are the activities that the organization actually does like, say, holding job training programs. Then there are the outputs which are measures of what happened with those activities. Did people actually come to your job training program? You might hold one and no one shows up. Or if it was a multi-day session, did people come every day? And then you get to the outcome which is, well, of the people who actually went through your job training program. How many of them got a job? And that might be a short-term outcome. And then there might be a longer-term outcome which is how many of them kept that job for a year? And if you think about those different metrics, you can have – imagine them being laid out from left to right on a piece of paper. And it's always easiest to measure on the left-hand side. And, I think, that's also a really good place to start. As much as possible, we want to move to the right-hand side. But it gets harder, right? Because if, for example, you want to see how many people still have a job after a year, you've got to find them. They might have moved, you know, they might have changed their phone number. That's actually going to take more work than counting the dollars that came in the door. So, as a field, I think we all know that we want to go to right. We want to go as far down that causal chain as possible. But it gets harder. And so, I think when it comes to picking metrics, sometimes what you have to do is recognize some of the metrics I'm going to be able to articulate but never measure. So, for example, your real dream is not just who got a job and kept it for a year, but who got a job and kept it for a year, becomes a productive member of a society who wouldn't have otherwise without your job training program. Through impact. That's pretty hard to measure. So, it may be that you want to articulate that that's your metric. Recognizing that you'll never be able to measure that perfectly. Or that you're going to have to wait until you got millions of dollars to do a randomized control trial. But it's still useful to say it out loud. And to say this is ultimately what we're trying to do. But when I think about non-profits, what I, you know, struggling with these questions, I – my one piece of advice more than anything else is to just get started. And to – even if it means you're starting on the left-hand side of that piece of paper – or you're scrolling out these different parts of the steps that lead to the good that you're trying to create. That's okay. Just get started. And that's been the philosophy that we've used with GuideStar Platinum which we launched in the spring of this year. And here's the basic description of that per your question. So, you know, the bulk of GuideStar's data comes from the tax forms that non-profits file which we have for 2.4 million non-profits. But none of us would want to tell our stories of human beings through our 1040. And nor should non-profits stop just with tax form and say, "Oh, yeah. You

can understand me by looking at this regulatory document.” And so, we invite non-profits to add additional data. Some of which is financial and operational but also a description of what are you trying to accomplish? How are you going to get there? And then, at this Platinum level, is around metrics. Now, we had a lot of people who said to us, “Well, what really matters are outcome metrics so you should only accept those when non-profits share them.” And we said, “You know what? We agree that is what really matters. But we want to have a low bar and invite organizations in to begin this process of shared learning. And it can only be shared learning if there’s a common platform that allows people to learn from each other. And so, that’s been quite successful so far. We have all of 2000 non-profits that have shared. Average of about 4 metrics each. Maybe that’s a good number. Four metrics to start. For some organizations, they’ve got 20. Other’s just have one. But it’s good to have a few different dimensions. And a tricky thing that we’ve been trying to navigate is that we – when multiple organizations are measuring the same thing, we want to be able to show that. And a lot of organizations to learn from each other. But we don’t want to say, “Well, you’re a homeless shelter, so therefore, you should be measuring X, Y, and Z. So, you’ve got to balance that sense of agency on the part of a non-profit to choose what makes sense for them. While also capturing those cases where there’s commonality. And we’ve been surprised just how much commonality there is. Of the first 4000 or so metrics we got, 72% of them came from this common database that we offered. So, they weren’t custom metrics that were unique just to – by particular unique snowflake of a non-profit – there was a sense of commonality. And so, over the next couple of years, I think we’ll begin to see more and more of that. And it’s going to make it much easier to really do the kind of benchmarking and shared learning that we all dream of. But it’s – we’re still early in the process, and it’s going to be a while, I think, into next year until we’ve got enough critical mass to really see those patterns.

>> Andrew Means: I agree. And I think you raised a good point around – especially some of the outcome data that’s harder to get to. I think this is why data sharing is so important. Often times, I definitely come from the belief that someone is probably collecting what you care about. It’s really about getting access to it. So, I care about long-term employment, so does the IRS and so I might just get a hold of that. It would be great. And that’s why I think we need to have that kind of culture of data sharing. But I love, you know, and I’ve [inaudible] GuideStar Platinum and I like the idea of giving organizations agency to choose what they want to share and reveal about themselves, and how they want to present that. I think that’s the right next step towards the vision of resources flowing to the most impactful organizations that we share. But can you talk some about the tension – a little bit more. You mentioned it. But the tension between giving organizations agency to choose what they want to share with the tension of creating common outcome so we can benchmark performance against each other layered with, let’s say, a third tension of the actual quality of the metrics when you’re choosing to collect them and then reporting about yourself. So, I’m just going to let that sit out there and you

[inaudible] all of our biggest challenge.

>> Jacob Harold: I think those are very difficult tensions. And I think they will take years to resolve and will never be perfectly resolved which is why we have to start with this common lattice work to hang all the data we can find to begin to learn together. But, yeah, there's a bunch of – so, here's an example. Think about two homeless shelters that are both measuring average nights stayed by an individual homeless person. But think – a homeless shelter, number one, serves the chronically homeless. People with severe mental illness or drug dependency. In that case, you actually want to maximize that metric. You may want someone to stay as long as possible so you can provide the services they need. But if you think about homeless shelter number two that's focused on the newly homeless – people who just missed a rent check and need a quick bridge. In that case, you actually want to minimize the number of average nights stayed. Right? So, both organizations are doing the right thing for their constituent, but one is maximizing and one is minimizing the exact same metric, right? So, that's a place where we just want to be really careful that by benchmarking, we are revealing that there's a diversity of strategies that totally make sense for the people that are being served. And doesn't end up hurting either organization because donors think, "Oh, we want to minimize this number." When, in fact, sometimes you want to maximize it. So, for that reason, we've been pretty cautious at this stage of really – we have intentionally not built tools to make that sort of comparison really obvious until we've learned more about, you know, what are the common metrics? Is it clear that people are thinking about them in the same way and that sort of thing? But still, I think that example is illustrative of why having this metrics as helpful for understanding the work you're trying to do and helps to clarify for people whose challenges we face as the [inaudible] society. So, we're excited about it but we're also a little nervous because we don't want to penalize those who are actually really doing the right thing for their particular community and their particular strategy.

>> Andrew Means: Absolutely. And then we've gotten questions about the whole concept of choosing metrics and so hopefully that helps to eliminate some of that. So, Rella, you've worked to build the data and evaluation capacity at the foundation and among your grantees as well. So, can you share a case study of how using data – how you've seen using data really support decision making and increase impact?

>> Rella Kaplowitz: Yeah, I'm going to give two examples because I know we have a really diverse group on this round table. So, I'm going to talk about a really small organization and then I'm going to talk about a really big organization. So, a really small organization – here's a good example of how data really improved decision making in a very small way. It's a smaller organization. Really new. Didn't really have a consistent way of tracking who they were reaching. And as a foundation, we ask our grantees – our partners – to let us know, you know, how many people do you plan to engage in the coming year? What type of engagement – what will that engagement look like? And then at

the – a couple of times in the year, we check in and say, “This was your goal. What are you, you know, do you think you’re going to meet your goal by the end of the year? Do we need to have a conversation, you know, that things changed? And this particular organization, even me just asking the question of,” “How many people do you think you’re going to engage next year?” And then checking in with them a couple of times a year really changed the way that they thought about what they should be tracking. And it’s not because they’re not smart. They just never thought about it in the way that I asked them before. I say, you know, we ask about, you know, different age cohorts, and how many people are you engaging in these different age cohorts, and different types of engagement. How many people are you engaging in service and volunteerism? And things like that. And so, in just a very small way, you know, I’ll send her asking that question. Really help them think differently about their work. And now, they are collecting data differently and they are able to make, you know, just small, smarter decisions. And I think that’s a really good example of how just doing one thing differently can really be a game changer. And it’s not about building huge database and collecting, you know, tons and tons and tons of data. Sometimes, it’s about just tweaking a process internally in your organization to think about data differently. And then an example of how a data has really helped decision making and learning and growth in another organization, I’m going to talk about Hillel International. Hillel is a campus-based organization that works to engage young youth on campus in Jewish life. And they spend a lot of time developing a series of change and a whole strategy around increasing a particular set of outcomes when it comes to Jewish identity. And they have this big model and they piloted it on several campuses. And that pilot has been growing. And one thing that they just discovered recently is they had a hypothesis that the more time an individual on a college campus is engaged by a Hillel profession – lots of different types of engagement – the more times they’re engaged, the better the outcome. And what they actually found is that there’s a plateau. And that, you know, after one or two instances of engagement, kind of, the same level of outcomes to six or more. And this was a huge part of their strategy but they sat back and they said, “Okay. Let’s tweak. Let’s change. Let’s learn. Let’s grow. Let’s shift our strategy.” And this is a really good example of how a really large organization – they have the headquarters here in DC and campuses all over the world. They started small with a group of 18 campuses. They’ve grown to have – I think, now they’re up to over 80 campuses that are participating in this particular project. And they are learning on the fly. And when they saw that this major hypothesis – which is a big part of their strategy – wasn’t actually true, they said, “Great. Now we know. We’re going to shift our strategy and we’re going to move forward.” So, that’s a really good example of how, you know, a learning mindset within – a growth mindset within an organization really just help them learn and grow and change and move forward.

>> Andrew Means: Would some of the organizations you work with – I’d be curious, Rella, your thoughts on that. When they’re dealing with something

maybe not a clear outcome metric, for example. Employment, it's either you have a job or you don't and you work – there a certain number of hours or not. But if you care about somebody's character or identity or perceptions about themselves or the world around them – have you seen organizations that care about those things you consider to use to data in innovative and trusting ways to help them hold themselves accountable to whether they're achieving this kind of softer, less tangible, or observable outcomes?

>> Rella Kaplowitz: Yeah, it's tough. It's tough. Some of the things that I help organizations try and measure, they're not directly measurable. And so, I think in those cases, you have to figure out, Okay, I can't directly measure this, so what can I measure that will give me a proxy? What can I measure that will be an indication that something is changing? You run into this a lot when you look at prevention. When you look at future aptitude. How can you measure something if you prevented it from happening? And, I think, it's about when you have, like, I'll just use this example of Jewish identity, Jewish engagement. There are many organizations that sat down and defined, "This is what this means for our organization." There is no common definition in the Jewish non-profit sector about what improving Jewish identity means. We can have whole conversations about that that in another time. But there – I think the important thing is when you're measuring things that's fuzzy, just sit down and try and define as clearly as you can what it means to you. And then go from there. And you may never be able to directly measure it, it doesn't mean you can't use that data to support your decision making. It means there are limitations in how it can support your decision making but all data can be used to make decisions. It's just a matter of, you know, will you be able to say that this caused this? Well, that can almost never happen. But, you know, can you use a set of data to say, "This seems to indicate this. Let's test it. Let's try." I think you can definitely do that.

>> Andrew Means: Awesome. In fact, you've worked with and observed non-profits all over the world. What kind of – what have you seen? And what organizations are you seeing as they – what are they doing as they build a practice and culture of data by the terms of success stories and then, maybe, a few data initiatives that you've seen that have maybe come up short from where they hope to be?

>> Beth Kanter: Sure, but I also wanted to build on something that Rella said about – on this whole idea of trying to measure things that are really squishy and difficult to measure. And I'm always reminded of this engineering book on measurement. I can't believe I read it but – and I can't remember the author's name – there's this whole section on it with the question, can you measure love? Okay. And so, he makes the claim that you can measure anything. As long as you unpack the criteria and know what you're looking for. And while they may not be comprehensive measures, the conversation around trying to unpack the qualities can help. And he uses the example, can you measure love? And what is love about? Love is being honest and open and

caring. So, let's just take the honesty criteria. So, love is about not telling lies. Okay? So, you could come up with a lying index which [inaudible] with people. You know, what is a good metric for not telling lies? Always telling one black lie per month? Or two black lies per month or telling five white lies or whatever? And then you could construct a method to determine what was a lie. Anyway, so that's the point – is that I think the conversation about what the criteria that is so intangible – to help you make it more precise. But back to your question, Andrew, about examples of non-profits creating a data informed culture or becoming learning organizations. So, the first thing I want to point out is a great paper that was just released by Mary Winkler from the Urban Institute. She's a fellow member of the Leap ambassadors. The Leap of Reason community. I think Jacob is a fellow ambassador. These are all people who are concerned about high performance. So, this paper gives lots of examples of different non-profits and case studies about becoming a learning organization. And three kinds of activities that she pulled out is that they're willing to discuss data inside of staff meetings. Maybe, you know, it's on the agenda. They have data review meetings, sort of, deep dives to discuss data. And then, this one which I loved, is rewarding behavior that is showing being data driven or data informed. Making decisions by using data. So, just on that topic, I'm going to give a show out to my colleague Steve MacLaughlin who just released this book. And I believe he's done some round tables and written some posts on markets for good. It's called Data Driven Non-Profits. And he has a really interesting data maturity of practice in this book. And it goes from the baseline, you know, at level zero if you will. Because Steve says, "Maturity practice models have to have five points and they start at level zero." And that's, you know, data. Using raw data. Did it happen? And then, it goes into hindsight. Descriptive analysis. What happened? Doing ad-hoc reports. And, I think, at this level that the playbook is really good at helping organizations figure that out. As we go up the ladder, we have insight, which is diagnostic and not analytics. Why did this happen? And that's having alerts and dash boards [phonetic] and that's where it's really important to become this learning organization so you can pivot and change. Foresight, here we get a little bit more sophisticated. We have predictive analysis. What will happen? And this requires a higher-level skill of modeling and statistical analysis. And then something can cause prescriptive analysis. What should we do? And this is, again, all-around performance, optimization, and decision report that the Leap of Reason community is really focused on. So, a couple of examples in my experience. My favorite story around this is Edutopia which is an online website that focuses on educational content online. It's sponsored by the George Lucas Foundation. And so, they were looking at their dashboard and they realized that they were only really measuring reach. And so, to bring every – so what they did was one of these, you know, data review meetings they have. They did a deep dive bringing every staff together. Senior managers as well as line managers to talk about what data is most important to us. What do we want to see on our dashboard? What kinds of reports do we need to make decisions? And so, they actually put – designed their dashboard with sticky notes on the

wall. And then they were able to work with their analytics department to actually design useful and actionable reports. What came out of that though was this awareness that, wow, you know, we're not really doing a lot of testing. AB [phonetic] testing and iterating and being, you know, agile. And so, this start, you know, how can we – and then that led to another conversation about this, sort of, perfectionism trap that Rella talked about where we try to make everything perfect before it gets out the door. And so, they decided that they would go – they would look at a part of their work as satisficing. Which is, you know, can we get a good result without investing 100 hours? Can we get the same result if we invest 50 hours or 20 hours? And can we measure that against these [inaudible] that we've identified. So, this helped them to get into the early stages of become a learning organization. A couple of other examples, of course, Giving Tuesday, which we're all familiar about. I think they've gone a great job at collective sense making. This is bringing people together who are working on a movement to think about what are the measurable metrics that we want to use. And what happened this past – during the past year's campaign and how can we improve it? Remember one year they did one gathering? They called it "Measurepalooza" where they really just talked about metrics. And then another small example comes from MomsRising. And I love this. They do – they're online network that does a lot of campaigns to fight for family friendly policies in the U.S. and so they're basically running online campaigns. At their staff meetings on Monday mornings, they have 20 minutes on the agenda for Metrics Monday where everybody looks at a campaign and discusses the metrics and how to improve. So, those are just a few examples.

>> Andrew Means: Those are great and we're actually getting a couple of questions around – are we going to share some of these resources afterwards? [Inaudible] follow you on Twitter. Can you tweet out the Mary Winkler article?

>> Beth Kanter: Oh, sure.

>> Andrew Means: And some of these other resources.

>> Beth Kanter: Sure. Sure.

>> Andrew Means: So, follow – [CROSSTALK] @Kanter. And then, also, if you're interested in Steve MacLaughlin's new book. It was a great episode of the Markets for Good podcast we recorded a few weeks ago, so, go to iTunes or go to Marketsforgood.org to check that out. But [inaudible] I want to go you really quick with one of our last questions here. Using data well is about a lot more than just the technical application of data to a problem or transparency. It also requires a commitment to the safe, ethical, and effective use of data. And this is implications for governance, capacity, partnerships, security, all of that. So, can you talk some about these kinds of challenges, including how organizations deal with partners who might not measure up and how they can protect [inaudible] the data that they have and the metrics of their collecting is that a resource they need to protect?

>> Jacob Harold: Yeah, these are questions that [inaudible] society as a whole

is wrestling with right now. It seems like every few days we hear about another giant company that got hacked and their data was shared with the world. And I know for sure my data has been hacked and that's probably true for most everyone on this call. And I think, you know, non-profits can at least – have some comfort that, you know, they're not going to get this full on assaults that a target or a Wall St. firm tends to get. Although, I think, we're going to see more of the non-profit sector and even GuideStar, we fend off 25 million attacks a year. Quite literally, million. And, you know, most non-profits won't face anything quite like that but that there are people who are going to want your data for one reason or another. And as we think about the power of data – with great power comes responsibility. We need to be thoughtful about protecting our constituent's data. Now, that said, one thing is there are other kinds of data that we may want to proactively share. Put under a creative commons license for example. So, a lot of it is just intentionality. What's the data that you're happy to share? Would be great to share? What's the data that you don't really care? You don't have to invest a lot in protecting it. And then, what's the data that's really important where the privacy of your constituencies is something that you really have a responsibility to protect. And that's actually not too hard a conversation to begin to filter your data into some basic buckets. That's just, you know, what would happen if this got out? Ah, actually, it would be awesome or it would be really terrible. So, have that conversation but it's going to be an involving challenge, I think, for the entire field. I think for the entire field. I think it is something that's worth a board level conversation for most non-profits to at least say, "Hey, we recognize this could be an issue. Here's what we're doing so far. What other thoughts do you have?" We had that conversation with our board at GuideStar earlier this year and we'll continue to do so. And, you know, I think most non-profits don't need to freak out about it. But they do need to take it seriously and I know it's something that a number of organizations that are part of the Markets for Good community are really starting to think through, "What are resources that we can offer?" And what's, kind of, a privacy playbook, you might call it, that can help non-profits navigate some of these challenges.

>> Andrew Means: And I think that's something that, you know, I know – at least with my involvement in Markets for Good, and your thing we're trying to really promote in 2017. So, for those of you interested in these issues, I think we're going to have some really great resources coming out next year. And the other thing I would say too is that, you know, when I've seen organizations deal with sensitive and private information. They can sometimes, you know, either decide, oh, we're not going to collect it anymore. And that, sometimes, is the right decision. Like, if you're not using it to inform any decision. That's totally fair. But there's also ways to responsibly use private information. There are times and places where it makes sense. Some of the work I've done previously is around helping school districts understand who might be at risk of dropping out. And that's a really important and valuable question but it requires working at that individual level. And that's why I think, too, we're going to see a shift

away from the open data movement in some senses. I think open data is really important. I think transparency is very important but opening up data is not always about the way to be transparent. I'm actually really excited about the open algorithm movement. I've seen people actually share some of those things in a much more transparent way. Again, I'm hoping we can help promote some of those things as they looked at 2017. But, Rella, I want to turn to you for what might be our last question here and then we might have one or two from the audience. But this actually comes from a couple of people that have chimed in with the chat box. Which is where could organizations begin practical, right, where they want a collection data – they might be new and they might be – their organization might be very new to that. What are some of the tools that an organization can use to just collect some data about those other surveys? You might want to unmute your cell. Yeah, there you go.

>> Rella Kaplowitz: That would be helpful, wouldn't it? So, I mean, my recommendation is always start at the free stuff. And if the free stuff doesn't work for you, move on to the paying stuff. There are lots of free resources out there. We highlight them in the section that talks about building surveys, things like Survey Monkeys, Zoomerang, Survey Gizmo. Lots of free resources out there to help you collect data. And when it comes to analyzing your data, Excel is your best tool. That's basically what I use for all the ones that I do. Unless you have really, really large data sets, you don't really need anything more. And so, I would say if you're looking to start collecting data, don't bite off more than you can chew. Scope what you – scope what is most important for you to collect. Start there. Use Excel. There are lots of excel tutorials. The way I got my start in what I do now is I had to give myself a crash course on how to write complex Excel formulas for a job that I stepped into. And so, I spent a week watching YouTube videos. There's an awesome YouTube channel called Excel is Fun. And that's really how I got my start. I was never really a data person. I majored in Psychology. Never planned to do what I do now although I love it. And it's awesome. And I fully own my data nerdiness. But, you know, there are so many free things out there. Good free things out there. Check out the Playbook, we have tons of resources for how to collect data. How to build your Excel skills. How to find someone who can help you build your internal capacity. And really use data to – even just be a little bit better tomorrow.

>> Andrew Means: Absolutely. I think plenty people have free resources. This is absolutely the way to go. There's great tools out there even for very complex uses of data. The other thing I would just add to that is investment in your culture are almost always a better place to start than investments in technology. If you are in an organizational culture that values evidence, that uses evidence in decision making, that uses evidence when trying to improve your organizations impact, investments in a lot of technology isn't going to get you very far. So, think through – and we've talked about this some. You know, Beth has mentioned that, Rella has mentioned that, Jacob, you mentioned this. The importance of having times reflect with data. Reflect on the data that you're collecting. And so, no matter if you're a very small organization with

very limited data resources, or a very large organization with lots of capacity, if you're not – if you don't have that kind of culture to think critically about your work, to use whatever evidence you have available to you in making decisions, investments in technology isn't going to get you as far as you might hope. And so, Beth, we'll do the last question for you which is this, we know that there's a lot of possibilities for growing impact with data but it's not without limitations or even potential downsides. So, from your perspective, what are some of the key points for social sector organizations to remember in terms of what data can do? What it can't do? And the kind of pitfalls we should avoid.

>> Beth Kanter: Okay, so I'm just going to talk about one and I'll give you a twist on an old joke. How many data scientists does it take to change a light bulb? One, but the light bulb has to want to change. So, we can be up at the highest level of the food change in terms of being, you know, data collection techniques and analysis techniques and even sense making techniques that will tell us some ideas about how to change your program to make it more effective. But that change can't make itself. Okay? We have to want to make those changes. We have not be afraid of making the pivot or think about it or how can we do this incrementally? So, I think it's really important that if you want to be using data, that the most important thing is having learning agility baked into your culture. Okay? So, learning agility is both inside an individual, but it can – I think it can also be part of the way an organization does its work. So, learning agility is both a mindset and it's also a skillset. It includes being open to new ways of thinking and to intentionally learning new skills or learning new ways of doing things. So, it's learning agility is the ability to process new information that comes in through data. Process new insights. And to quickly adjust – maybe even on the fly – to changing circumstances. And so, if we think about learning agility and what it's comprised off, you know, it's innovation. It's high performance. It's the ability to take calculated and strategic risks. And most importantly, it's this ability to reflect. To use that feedback to improve performance and to understand assumptions of behavior and to be able to generate those deep insights about your program. And what the challenges are and then to actually move to action. So, learning agility, I would say, is try to become – work those muscles for learning agility.

>> Andrew Means: Absolutely. And the folks we've – this is getting hit home is that any organization, no matter what your size, can practice learning agility. It's going to look different depending on what resources you have available to you, where you sit, what your organizational culture is like. But everyone can practice that. Everyone can practice using evidence in making decisions. Everyone can practice self-reflection. And using data and information to learn more about themselves and their organizational performance. So, I know sometimes when you talk about data, it can be overwhelming, it can be scary. But part of the reason I love resources like Rella's put together, the Schusterman Foundation put together, because hopefully makes this accessible. Hopefully it takes a little bit of the air out of the room and lets people breathe a little bit more to actually use this kind of stuff. So, that wraps up our time today. Thank

you so much to everyone on our panel and all of our attendees, for joining. If you missed any parts of the conversation today, want to replay them, or sharing them with a colleague, it will be released through the Markets for Good podcast which can be found on iTunes. And you should absolutely subscribe because we have some great guests coming up. Be sure to check out the full Data Playbook at Schusterman.org. And as always, during the conversation around the uses of digital data for social good at marketforgood.org. thank you, everyone, for joining us and have a great rest of your day.