



Metrics Report: Assessment and Evaluation Recommendations Summary Excerpts from Full Report August 2023

As part of its 2020 strategic plan, CNDC made a commitment to better understanding its impact and collecting data to inform ongoing refinements in its services. In 2022, CNDC partnered with Omni Institute on a two-phase effort to:

1. Explore social and economic influences of its services;
2. Identify gaps in data collection and areas in which practices should be expanded and/or improved; and
3. Create an evaluation framework with recommendations for data collection and more strategically assessing efforts over time.

Below is a summary of the full report.

HISTORICAL CNDC PROJECT PORTFOLIO SNAPSHOT

CNDC project portfolio data include 113 CNDC projects with start dates from 2012-2022 and projects designated as Model A which is the traditional and most common model practiced by CNDC (Model A projects apply to become part of CNDC and agree to operate under CNDC's umbrella with no legal separation).

Areas of Service

The most common areas of services for these CNDC projects included Education, and Health/Public Health.

- Education 22%
- Health/Public Health 20%

Financial Characteristics

CNDC has seen changes in project financial characteristics over the years. While small projects have always been a meaningful part of the portfolio, CNDC has started consistently supporting larger projects over the past five years with the average annual revenue nearly doubling during that time.

Project Exit

Projects with valid recorded start and end data, stopped working with CNDC for three main reasons: closing, spinning off into their own 501(c)3, and merging with another entity/being acquired by another organization (n=58). Many projects also continue with CNDC. Projects that were still part of CNDC during the evaluation process, were not included in this part of the analysis.

PROJECT SATISFACTION SURVEY ANALYSIS

The item-level mean scores on CNDC's Satisfaction Survey suggest that the services provided have historically had a high perceived value, and that projects are typically satisfied across all key areas. Furthermore, there was no significant correlation found between project revenue and satisfaction measures, suggesting that organizations of all sizes have been satisfied with the services provided and find them valuable.

CNDC Strengths

Open-ended responses on CNDC's Project Satisfaction Survey highlighted several CNDC strengths, including overall quality of services and staff support. Organizational strengths included customer service, supportive and friendly staff, and overall quality and value of services.

Potential Areas for Improvement

Projects also highlighted opportunities for growth, including improving financial reports and processes, the desire for quicker turn-around on budgets and payroll, and the need for more communication and guidance. Several projects also mentioned the desire for a tiered approach to the project fees CNDC charges, offering various levels of services depending on project needs.

COST BENEFIT ANALYSIS (CBA)

OMNI conducted a CBA for CNDC's fiscal sponsor services to estimate the potential cost savings that CNDC's fiscal sponsorship model provides.

Cost Benefit Analysis Calculations

Often, CBAs involve quantifying the monetary value of both tangible and intangible benefits and costs. In this case, only tangible benefits were included in the CBA calculations. Examples of intangible benefits that were excluded from our calculations include support during Executive Director transitions, crisis management support, and immediate access to a line of credit. Accordingly, the estimates of the cost-benefit of CNDC fiscal sponsorship likely underestimate the actual benefit that a project would realize over the course of its lifespan.

Accounting for CNDC Project Variability

To account for the variation of circumstances of projects, a set of four CBAs were conducted based on high and low revenue scenarios and high and low project complexity.

Complexity and Revenue

Project Complexity was determined by the types of services needed to support a project's sustainability. In addition to complexity, each project has a unique financial situation. Project Revenue was informed by a historical revenue analysis of CNDC projects.

Cost Benefit Analysis Results

Results from the four resulting CBAs are:

- The estimated annual savings for low revenue, high complexity projects is 83%.
- The estimated annual savings for low revenue, high complexity projects is 37%.
- The estimated annual savings for low revenue, low complexity projects is 66%.
- The estimated annual savings for high revenue, low complexity projects is 17%.

EVALUATION RECOMMENDATIONS

The evaluation recommendations presented in this section of the report were developed to enhance the quality of ongoing data collection and to inform a more robust framework for evaluating CNDC's services over time. Recommendations are grounded in findings from the Phase I Assessment, as well as in feedback gathered through dialogue with CNDC staff and representatives from several projects.

General Recommendations

General evaluation recommendations include the following:

- Standardize structured data collection tools and processes to ensure consistency and more effectively assess potential changes over time. This includes internal processes as well as survey administration approaches and timing.
- Ensure existing day-to-day data management systems (e.g., Salesforce) are configured to support evaluation.
- Develop additional internal infrastructure as needed, that allows for easeful tracking of project portfolio information and structural alignment across systems for necessary data merging, etc.
- Cultivate more real time learning opportunities and feedback loops with CNDC projects. CNDC could utilize information sharing strategies such as newsletters or project highlights that allow projects to learn about the work of other projects. CNDC could also host convenings such as quarterly learning community events in which projects come together to connect, learn from each other, and provide real time feedback to CNDC. Project representatives who participated in the evaluation feedback sessions specifically expressed a desire for opportunities to:
 - Surface challenges and potential solutions
 - Promote cross-project information sharing to maximize impact and leverage resources and ideas

JEDI Recommendations

Specific evaluation questions and detailed recommendations for CNDC's ongoing equity, diversity, and inclusion efforts; project portfolio; satisfaction survey; and cost benefit assessments are provided next.

Three core EDI areas in which CNDC may focus, include:

- Assessing values alignment with projects as CNDC continues to grow its project portfolio
- Evaluating project satisfaction with CNDC services and key related equitable practices
- Supporting projects by promoting EDI-related support and learning opportunities

First, CNDC should develop clear and transparent expectations for projects: This involves clearly communicating expectations regarding EDI practices to projects and potential projects. Outline the specific EDI goals and principles that CNDC prioritizes and explicitly communicate the importance of projects aligning with these values. CNDC should utilize its recently developed core values and EDI preamble as a starting point.

CNDC should also establish EDI criteria as part of the project application process and ongoing assessment of CNDC's project profile: Integrating EDI-related questions and criteria into CNDC's application process, questions about the project's commitment to EDI, their strategies for promoting diversity and inclusion, and any relevant initiatives they have implemented, will allow CNDC to assess the alignment between related CNDC and project values over time. CNDC should also ensure that they maintain these criteria internally in their own organizational practices.

Key potential EDI criteria include the following:

- Demonstrated commitment to EDI: Assess whether the project has a clear commitment to EDI, as reflected in their mission, vision, values, and strategic plans. Look for explicit statements and evidence of their dedication to fostering an inclusive and equitable environment.
- Diversity in leadership and governance: Document the composition of the project's board of directors and senior leadership team. Assess the diversity of representation in terms of gender, ethnicity, race, age, and other relevant dimensions. Look for projects that prioritize diverse perspectives at decision-making levels.
- Staff diversity and inclusion: Consider the project's efforts to promote diversity and inclusion among their staff. Assess the diversity of their workforce in terms of gender, ethnicity, race, disability status, and other relevant factors. Look for evidence of inclusive recruitment practices, equal opportunity policies, and professional development opportunities for diverse employees.
- Inclusive programs and services: Evaluate the extent to which the organization's programs and services are designed to be inclusive and accessible to diverse populations. Look for implementation of cultural competency training for staff, accessibility measures for individuals with disabilities, multilingual services, and targeted initiatives that aim to reduce disparities and promote equity.
- Impact on marginalized communities: Assess the project's track record in serving and advocating for marginalized communities and underrepresented populations. Consider their efforts to address systemic barriers and promote social justice. Look for evidence of partnerships with community-based organizations and initiatives aimed at addressing inequities.
- Project policies and practices: Review written policies and practices related to EDI. Assess the presence of policies addressing anti-discrimination, harassment, diversity, equity, and inclusion. Review recruitment and hiring practices, board diversity, staff training programs, and any other relevant policies or initiatives.
- Evaluation and accountability: Assess project commitment to ongoing evaluation and accountability in their EDI efforts. Look for evidence of monitoring and reporting on progress, setting measurable goals, and learning from outcomes. Consider their transparency in sharing successes, challenges, and lessons learned.