



ACCE CONVENTION 2008

INNOVATE

July 30-August 2


Pittsburgh, Pennsylvania

Reporting Your Results

Friday, August 1, 2008

9:30 AM

Convention Center Room 318





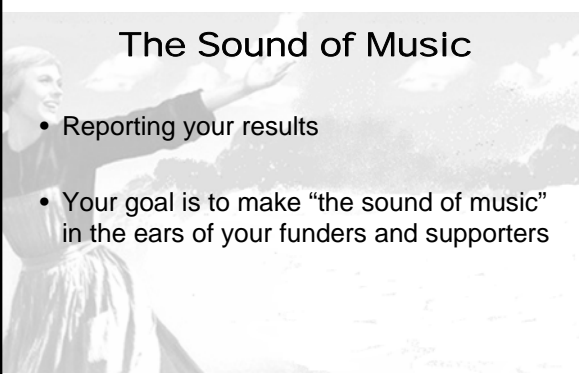
ACCE AMERICAN CHAMBER OF COMMERCE EXECUTIVES
Enhancing the professional growth, career development and management effectiveness of chamber professionals

The Sound of Music: Reporting your Results

ACCE Convention 2008: Innovate!
July 30 – August 2



Presented by:
Mary Phan-Gruber, MSW
Dina M. Unrath, CPA, SPHR







The Sound of Music



- Reporting your results
- Your goal is to make “the sound of music” in the ears of your funders and supporters



The Sound of Music

- Experience writing a grant report?
- Sending or offering appreciation to a sponsor or donor?
- Had to compile information for a report to your Board?
- How many of your Chambers publish a newsletter, either print or electronic?
- How many have a website?
- Is your organization always accountable?
- Are your strategies always transparent?

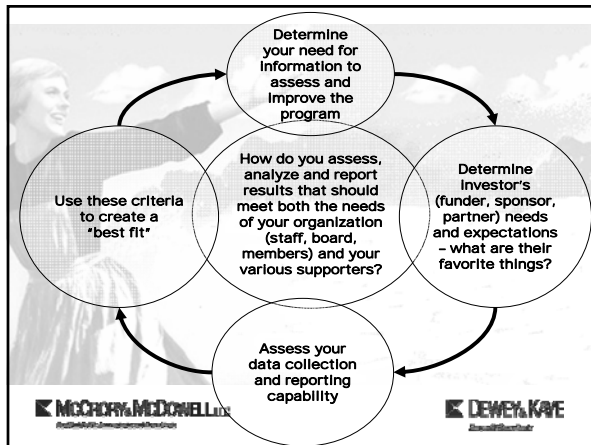



Start at the very beginning— a very good place to start

- Begin planning your results as you identify or develop your original goals and objectives for a program or project
- Ask yourself:
 - o What is the purpose of this program or project?
 - o What will we accomplish?
 - o What difference will this project make?
 - o Who are my stakeholders?

MCCORMY & MCDONELL LLP
Public Health Law and Policy

DEWEY & KAYE
Healthcare Law



MCCORMY & MCDONELL LLP
Public Health Law and Policy

DEWEY & KAYE
Healthcare Law

Do you need an outside evaluator?

1. Required by funder? (public \$, SBA loans)
2. Merited by the size, scope, length of project?
3. Pilot with potential for replication?
4. Is it a collaboration –complex?
5. Availability of funds for evaluation?
Typical evaluation expense is 10% of total project cost
6. Low-cost options: university expertise/interns
7. Outside evaluator ideally involved from the beginning in the project design

MCCORMY & MCDONELL LLP
Public Health Law and Policy

DEWEY & KAYE
Healthcare Law

You are sixteen going on seventeen

- Results must be measurable-quantify or qualify
- What to consider?
- Process evaluation for a new/test program
- Impact evaluation—what is the effect?
- Emphasis on Outcomes-what is different?
 - use of data, indicators, benchmarks
- Logic model is a way to map the process

MCCORMY & McDONNELL LLP
Healthcare Compliance and Risk Management

DEWEY & KAYE
Healthcare Law

Something Good

1. Results must be clear, measurable and explained
2. Gathering info must involve all key staff/volunteers
3. Answer these questions
 - What are the results?
 - Did the project proceed as planned?
 - What strategies did you use or change?
 - What do the results mean?
 - Were the results expected?
 - What were the unexpected results? Why?
 - What worked well? What lessons did you learn?
 - How will you apply what you've learned?

MCCORMY & McDONNELL LLP
Healthcare Compliance and Risk Management

DEWEY & KAYE
Healthcare Law

I Have Confidence!

- Build the relationship with funders and supporters-continues through reporting
- Keep all informed along the way—quarterly, midyear or more as required
- Use reports to say what has happened and what will happen next: programs, finances
- Vary reporting by funder (review expectations) even though means adjusting financial report
- Send evidence

MCCORMY & McDONNELL LLP
Healthcare Compliance and Risk Management



DEWEY & KAYE
Healthcare Law

Climb Every Mountain

Address the challenges--Barriers in Reporting

1. Target or mix results to appeal to the "head" & "heart"

- a. Case Study: Jason Jones didn't think of himself as a successful entrepreneur until he became part of the Young Business Professionals Program of the local Chamber. "I attended the initial training—learned some new ways to think about my business and made some great connections—new vendors, people I'm selling to and a couple of people I think of as mentors".
- b. Results from the first year of the Young Business Professionals Program include: 180 people served, 6 workshops provided with average rating 4.2 of 5, 20 new member organizations






Climb Every Mountain

Address the challenges--Barriers in Reporting

2. Lack of information

- a. Prepare from the beginning of the project to collect info
- b. Alert and remind those who are to collect and provide info
- c. A lack of information is a barrier to the next investment – takes away value from your project






Climb Every Mountain

Address the challenges--Barriers in Reporting

3. Poor results

- a. Don't hide
- b. Analyze the reason, define your options and address (don't overpromise initially, set reasonable targets to report on)
- c. Don't surprise the supporter – prepare
- d. Funder interested in how you address the problem, as well as the poor performance (think long-term relationships)

I Have Confidence

I've always longed for adventure
To do the things I've never dared
And here I'm facing adventure
Then why am I so scared

The courage to serve them with reliance
Face my mistakes without defiance
Show them I'm worthy
And while I show them
I'll show me

So, let them bring on all their problems
I'll do better than my best
I have confidence they'll put me to the test
But I'll make them see I have confidence in me



So Long Farewell

Don't engage in these behaviors—
they will encourage farewells

- 1. Decide how and what results to report after the program is done!**
 - o Design for data collection
 - o Design from the beginning—create meaningful and measurable objectives
 - o Collect data which meets their needs and appeals to head and heart
- 2. Implement the program—don't waste a lot of time on communicating with stakeholders**
 - o Ignore the continued information needs of your staff, board, and key partners, such as grant received, program started
 - o Write vague, generic reports because key program staff not even asked to collect results
 - o Remember to include program and financial updates
 - o Don't just collect the data—analyze and attribute
 - o Remember to thank all of the stakeholders and give credit early & often



So Long Farewell

Don't engage in these behaviors—
they will encourage farewells

- 3. Regard funder demands for info only as intrusions, not opportunity**
 - o Think of it as a partnership with your investors—accountability
 - o Use it as an opportunity for quality improvement
 - o Design to collect impacts—what difference did this make?
 - o Build long-term relationships even with short-term projects
- 4. Assume your stakeholders like surprises or prefer to receive their news indirectly**
 - o Prepare for poor performance—provide an early alert
 - o If things go awry—tell funder and explain your plan to remedy
 - o Share major organizational changes as well as program results
 - o Unintended consequences can be compelling





So Long Farewell

**Don't engage in these behaviors—
they will encourage farewells**

5. Force others to mine for information on results

- o Be clear in reporting and creative in the method & transparent
- o Provide evidence for funder: articles, brochures, event materials
- o Vary reporting by type of funder: foundation, government, corporate
- o Let your supporters be the "first to know"

**Thank you very much for attending this
session. For questions or information on
additional resources, please contact:**

Mary Phan-Gruber, MSW
email mpgruber@mccmcd.com

Dina M. Unrath, CPA, SPHR
email dunrath@mccmcd.com

Phone: 412-281-9690
www.mccmcd.com

