STRUCTURING A DIRECTOR OF OUTCOMES & EVALUATION POSITION

AMBASSADOR INSIGHTS
August 20, 2015

STRUCTURING A DIRECTOR OF OUTCOMES & EVALUATION POSITION

"Ambassador Insights" are drawn from online discussions of the **Leap of Reason Ambassadors Community**, a private community of nonprofit experts, leader practitioners, and instigators. The community's purpose is to:

· inspire, motivate, and support nonprofit and public sector leaders (and their stakeholders) to build great organizations for greater societal impact

· increase the expectation and adoption of high performance as the path toward that end.

While "Ambassador Insights" do not represent the views of all ambassadors, they have been vetted and approved by each ambassador who contributed to the dialogue and presented to the full Leap of Reason Ambassadors Community for review.

They are intended to help provide context, resources, and information and are by no means an exhaustive review of available resources. Though we strive to keep this information current and accurate, errors can occur. They are therefore provided "as is" with no guarantee of accuracy, completeness, or timeliness.

All publicly available "Ambassador Insights" may be accessed **here**.

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STRUCTURING A DIRECTOR OF OUTCOMES & EVALUATION POSITION

BACKGROUND

Anne Goodman's question to the Leap Ambassadors Community in February 2015, about how to structure a new Director of Outcomes & Evaluations position at the Saint Luke's Foundation sparked insightful and substantive responses from five ambassadors based on experiences within their own organizations.

GUIDANCE HIGHLIGHTS

(FULL RESPONSES ORGANIZED BY THEME, BELOW)

- Think of this as the first hire in building a team; they won't be able to do it all on their own.

- Consider EQ (emotional intelligence) as much as IQ; evaluation and quality improvement lead to change management—look for people who are good with people.

- Increase the influence of the position by making it a direct report to the CEO/President/Exec. Director.

- Start internally. Working in partnership with key leadership, the person in this position should start by:
  - o Setting the cultural foundation within your organization
  - o Sharpening your organizational goals/outcomes and evaluation
  - o Solidifying your organization's theory of change.

- The first hire needs to know they are driving culture change; discussions and planning with key leadership should focus on change management, establishing small wins from the beginning.

- Then, the person in this position can help grantees understand what role they play in the larger scope of your work and identify which of your indicators they can help support.
  - o Practical cautionary note: Grantees have only so much time and resources to put into data collection and monitoring. Decide whether to emphasize the needs of grantees or the needs of the foundation.

- Keep in mind that the internal work will evolve, but never be "done."

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RECOMMENDED REPORTS

- **Benchmarking Evaluation in Foundations: Do We Know What We Are Doing?**, The Foundation Review, January 2013 (recommended by Patti Patrizi who for 15 years ran the Evaluation Roundtable, which convenes evaluation directors from philanthropy and also benchmarks practice and is now running the Center for Evaluation Innovation in DC).

- **Necessary and Not Sufficient: the State of Evaluation Use in Foundations**, which "highlights an important and interesting variation among those foundations where evaluation units report directly to the CEO," and other relevant case studies, articles, and papers from the Evaluation Roundtable here (per Patti Patrizi).

- **Building Capacity to Measure and Manage Performance**, Bridgespan (recommended by Isaac Castillo).

PEOPLE RECOMMENDED TO CONSULT

- Isaac Castillo, Deputy Director at DC Promise Neighborhoods Initiative (former Director of Data and Evaluation) and a Leap Ambassador, isaac.castillo@dcpni.org

- Dominique Bernardo, CFO at Congreso (recommended by Cynthia Figueroa who noted that Dominique recently served as the VP of Quality Assurance at Congreso) and a Leap Ambassador, bernardod@congreso.net

- Juan de Angulo, Director of Data and Evaluation at Congreso (also recommended by Cynthia Figueroa who noted that Juan "can provide great perspective regarding the role he plays in the agency"), deanguloj@congreso.net

- Gabriel Rhoads, Edna McConnell Clark Foundation's Director of Evaluation and Learning, (recommended by Lissette Rodriguez who noted that he has a role similar to the one Anne laid out and could also tell her about the two other people on his team), grhoads@emcf.org

SAMPLE JOB DESCRIPTIONS   (SEE APPENDIX)

- Director of Data and Evaluation at DC Promise Neighborhoods Initiative (Isaac Castillo noted that unlike Saint Luke's Foundation, DCPNI is a direct service organization, but since they do grantmaking, "[they] have had to create an internal culture of outcome measurement and evaluation" and "provide technical assistance [in some cases, very intensive technical assistance] to our grantees/partners").

- Director of Evaluation and Learning at Edna McConnell Clark Foundation (shared by Gabriel Rhoads).
- Director of Evaluation and Quality Improvement at a nonprofit (Anonymous upon request).
- Director of Program Evaluation and Planning at an agency (Anonymous upon request).
- Director of Data and Evaluation at Congreso (shared by Juan de Angulo).

Important Note: As Patti Patrizi explained, "There is a huge range of emphasis in the job descriptions. The direct service providers (rightfully) need to emphasize data collection, data quality, and improvement of service. This is not necessarily the same job as that of an evaluation person in a foundation (of course depending on what kind of foundation it is, for instance an operating foundation would have some of the same needs as that of a service provider). And the person who is good at working internally within a foundation—that is doing theory of change and helping to identify strategy indicators etc.—is not likely to be the same person who can work in a hands-on way with grantees to help them improve their own data systems and use."

Sample organizational structure: Also see Appendix for a detailed table describing how the Data & Evaluation department at Congreso is structured.

QUESTION TO THE COMMUNITY

FROM ANNE GOODMAN, PRESIDENT AND CEO, SAINT LUKE'S FOUNDATION OF CLEVELAND, OHIO, ON FEBRUARY 10, 2015

"The Saint Luke's Foundation plans to hire a new position on staff called the Director of Outcomes and Evaluation, and I am looking for some advice from fellow Ambassadors about how to structure the position. My plan is to have the Senior Program Officers report to me and focus the new incoming Director of Outcomes/Evaluation on building and strengthening an organizational culture of continuous learning, evaluation of results, and ongoing improvement in how we do our work. This also needs to happen with a large % of our current grantees. Weighing these two primary objectives (strengthening our focus on knowledge and outcomes with internal staff and developing more of this across our grantee base to promote better organizational learning from our funding), I am leaning towards a hard internal push first, before further work is done with grantees, though we are certainly doing some of the latter already.

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"So I have two 'asks' of my fellow Ambassadors: 1) I would be interested in any job descriptions, particularly from the foundation world, that outline this kind of position; and 2) given the fact that our grantees need to make progress on better incorporating outcomes and evaluation in their work I would love to learn from any examples Ambassadors have of how this kind of thing can be operationalized by a person/role inside a funding organization?"

RESPONSES

(ORGANIZED BY THEME)

THINK OF THIS AS THE FIRST HIRE

- **Isaac Castillo: "First, I will say that it will likely be** difficult for a person to do both the internal work and the external/grantee work at the same time without any help. **You would need a true superstar that has done both types of work already, and even then they would probably need help. And even** when things are up and running, it will likely require multiple people to maintain the work **(depending on the size of your org, and the number of grantees you would be working with). First piece of advice is to** think of this as the first hire in building a team, and that this person would eventually hire one or more people to help with their work.

  "When I was working in the Director of Data and Evaluation position, my time was split into thirds. One third of my time was spent working on internal cultural issues —working with staff to get them more oriented to outcomes measurement and performance management. Another third was working directly with grantees—helping them also understand outcome measurement and performance management, but also focusing on simple things like proper use of measurement tools and even just the benefits of simple technology (like Excel) to assist in the process. The last third of the work was focused on collecting community wide data and staying up on current program evaluation and program design research to help inform our work.

  "As my position evolved, I hired someone to take over a large chunk of the external work—it was taking up a lot of time to do technical assistance and support for our 8 grantees, especially once the grantees left the paper/pencil stage and needed more support with their data systems. So that made us a staff of two. But really, we need a third person—someone to focus heavily on the internal work as we slowly expand the amount of programming we delivery ourselves."

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CONSIDER EQ (EMOTIONAL INTELLIGENCE) AS MUCH AS IQ—LOOK FOR PEOPLE WHO ARE GOOD WITH PEOPLE

- Gabriel Rhoads (EMCF's Director of Evaluation and Learning, recommended by Lissette Rodriguez): "When you're hiring for an Evaluation Director, I've often been told you want to consider EQ as much as IQ. Evaluation and quality improvement can lead to change management, and when you're hiring, be sure to keep a lookout for people that are good with people. It's possible to bring on a team that's fantastic with data, but the leader should be able to interpret, explain, and make all the information understandable."

POSITION THE ROLE FOR MAXIMUM INFLUENCE

- Alice Shobe: "Very quickly after hiring Mei Ling [our first measurement and learning position], **I moved her to become a direct report to me so that I could increase her influence agency-wide**. It was clear that I was prioritizing this measurement and learning culture shift and I helped positioned Mei Ling with the right technical knowledge to have the most influence/authority possible."

START INTERNALLY WITH YOUR THEORY OF CHANGE, CULTURE, GOALS

- Isaac Castillo: "I think that it is important that this person **start by making sure there is a good theory of change and set of outcomes for your organization that everyone is in agreement upon.**"

- Alice Shobe: "My advice from our journey is to **really focus internally first and make sure you've set the cultural and expertise foundation.** We really spent a good couple of years doing that by **focusing on sharpening our own organizational goals/outcomes and evaluation** and personal goals/evaluation. From there we began to move from exclusively hiring external evaluators to more direct outcomes work on individual grants and work with our grantees. As we've moved into this current chapter, we are also working closely with our public sector partners to make sure we were focused on the learning/insights needed to advance our homeless work in our counties."

FIRST HIRE IS DRIVING CULTURE CHANGE, SHOULD BE FOCUS OF KEY LEADERSHIP

- Cynthia Figueroa: "The first person hired needs to know they are **driving culture change** in the organization. Discussions and planning with key leadership should be equally focused on change management. Need to establish what will be some small wins from the beginning."

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THEN HELP GRANTEES IDENTIFY WHICH INDICATORS THEY CAN SUPPORT IN BROADER SCOPE OF YOUR WORK

- Isaac Castillo: "Once [your theory of change] is in place, then it should be presented to the grantees to help them understand what role they would play in the larger scope of Saint Luke's work. "At DCPNI, **when we first start working with grantees (and at the beginning of each new grant cycle) we have them look at our theory of change and indicators and have them talk about which indicator they think they can help support.** This way, right from the beginning, we get grantees to focus on a few indicators (we really don't let them choose more than three) and we know pretty quickly where we have gaps in our service strategy. Ultimately, this helps get everyone oriented to a performance and outcome driven culture—internal and external people are all aligned to achieving the set of outcomes you have laid out. And it speaks to the importance of the data collection and outcome measurement work—if we can't measure what we are doing, then how do we know if we are actually making a difference towards what we committed to?"

PRACTICAL, CAUTIONARY NOTE: GRANTEES ONLY HAVE SO MUCH TIME FOR DATA COLLECTION, DECIDE WHETHER TO EMPHASIZE NEEDS OF FOUNDATION OR GRANTEES

- Patti Patrizi: "Grantees have only so much time and resources to put into data collection and monitoring. Foundations need to decide what they hope to emphasize in terms of data collection—the needs of grantees or the needs of the foundation. It is also important to be very **clear about the different types of responsibility and accountability** for a foundation or for its grantees. It is not the same."

KNOW THE INTERNAL WORK WILL NEVER BE "DONE"

- Isaac Castillo: "I do agree with your strong internal push first—I think you need to do that to make sure your organization is in a good place. However, **I do want to caution that the internal work will never be 'done'—it will just evolve.** Staff turnover will mean that there will always be basic culture work and training that will need to be done. And as existing staff become more bought into the ideas, they will have more sophisticated questions that will require more time from your evaluation staff to answer. At some point you will need to decide when it is time to do the external work as well—and that time may be signaled by hiring of a second person."

CONCLUSION

Our thanks to Anne Goodman, Isaac Castillo, Cynthia Figueroa, Dominique Bernardo, Alice Shobe, Patti Patrizi, Lissette Rodriguez, and Gabriel Rhoads for sharing their insights.

APPENDIX – SAMPLE JOB DESCRIPTIONS

DC PROMISE NEIGHBORHOOD INITIATIVE
DIRECTOR OF DATA AND EVALUATION
JOB DESCRIPTION

ABOUT THE DC PROMISE NEIGHBORHOOD INITIATIVE

The DC Promise Neighborhood Initiative (DCPNI) is a nonprofit organization with the goal of ending intergenerational poverty in the Kenilworth-Parkside community of the District of Columbia. DCPNI provides a continuum of services to children, youth, parents, and residents in the community designed to help them achieve DCPNI's Five Promises: a caring adult in the lives of each child, an effective education for all, a healthy start and continued health, a safe place to live and learn, and an opportunity to give back to the community.

Through a combination of unique partnerships that include public charter schools, DC Public Schools, private corporations, community residents, service providers, and community based organizations, DCPNI seeks to build a pipeline of services and supports for the children, parents, and caregivers living in the Kenilworth-Parkside community using a multi-generation model.

ABOUT THE POSITION

DCPNI's Director of Data and Evaluation manages the Data and Evaluation Department at DCPNI and will oversee all of DCPNI's work in the Kenilworth-Parkside community relating to the collection, analysis, and dissemination of information and data for the purpose of organizational learning and continuous program improvement. This will include the collection and analysis of data from primary and secondary sources designed to improve student, parent, and resident outcomes in the Kenilworth-Parkside community. This position will also oversee all evaluation related activities at DCPNI including acting as a liaison for all external evaluation work and leading all outcome-related reporting activities for federal and local grants obtained by DCPNI.

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THE DATA AND EVALUATION DEPARTMENT IS RESPONSIBLE FOR:

- Assisting the organization in collecting, analyzing, and using data to inform the development and/or implementation of the cradle to career pipeline and targeting interventions effectively;

- Implementing a plan, and maintaining infrastructure for, collecting necessary data internally and from partner organizations;

- Supporting the timely and accurate collection of data;

- Designing internal evaluation plans as necessary and supporting work for national Promise Neighborhood initiatives relating to data collection and evaluation;

- Sharing data and reporting progress regularly to families, funders, and other stakeholders; and

- Collecting and reporting data as part of DCPNI's contractual requirements.

CORE RESPONSIBILITIES AND ACTIVITIES OF THE DATA AND EVALUATION DEPARTMENT INCLUDE:

- Using both qualitative and quantitative data to assess whether an intervention is evidence informed or evidence-based;

- Providing partner organizations technical assistance to improve their capacity to collect data and become more evidence-informed (or evidence-based);

- Assisting with identification of indicators of success and setting challenging but achievable annual targets;

- Using data produced by partners for planning and continuous improvement;

- Building and maintaining a longitudinal data system using the Efforts-To-Outcomes (ETO) client management system;

- Disaggregating, analyzing, and interpreting data;

- Determining and recommending when data may need to be gathered in alternative ways;

- Preparing reports and maps with analyzed data for a variety of audiences;

- Presenting data in various formats to multiple audiences, including public presentations, webinars, media interviews, blogs, written documents, and social media;

- Maintaining a client management system using appropriate technology to collect and aggregate individual level data on students, parents, and residents receiving programming;

- Managing data security for client management system;

- Understanding the range of confidentiality issues and regulations that may pertain to data that will be collected and stored by DCPNI, as well as maintaining privacy and human subjects' compliance.

RESPONSIBLITIES FOR THE DIRECTOR OF DATA AND EVALUATION INCLUDE:

- Oversight of the collecting, aggregating, analyzing, and presenting of demographic, attendance, outcome, and program data, as well as community level data for Kenilworth-Parkside;

- Conducting qualitative and quantitative research as appropriate, including original / primary research;

- Analysis of large publicly available data sets as appropriate and necessary;

- Oversight of DCPNI's client management system data collection and training processes, as well as development of infrastructure to collect client level demographic information, attendance data, and outcome data;

- Development and coordination of trainings for DCPNI staff and staff of partner organizations in the creation of a data-driven organizational culture, the creation of logic models, and the development of data collection infrastructures;

- Preparing reports, presentations, and other print and electronic products using narratives, tables, graphs, and maps that make complex topics, data, and analysis understandable to a variety of audiences;

- Oversight and coordination of a Neighborhood Survey of randomly selected households in the community every two years;

- Oversight and coordination of a School Climate Survey for all students attending middle and high schools that are located in Kenilworth-Parkside every year;

- Representing the organization as needed at meetings and other forums with a variety of agencies, groups and organizations – including presentations at community meetings;

- Ensuring that human subjects protections and regulations are followed properly;

- Overseeing technical assistance to all staff and partners regarding research and evaluation;

- Enhancing learning opportunities for the organization and its stakeholders and assuring knowledge and skills transfer that enhance the capabilities of the staff and stakeholders through a community of practice;

- Ensuring that the data and evaluation department is properly resourced and represented within the senior management team. This includes oversight of existing

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budget, tracking budget expenditures, and preparing yearly budgets for upcoming fiscal years;

- Management and supervision of all staff in the Data and Evaluation department;

- Manage the initial negotiation and inform final negotiation through full execution of data sharing agreements with the District of Columbia's Office of the State Superintendent of Education, District of Columbia Public Schools, DCPNI partner schools and other District of Columbia Agencies;

- Lead all organizational and community discussions related to collective impact.

QUALIFICATIONS FOR THE SENIOR DIRECTOR OF DATA AND EVALUATION

- Master's degree required. Mathematics, Statistics, Economics, Public Policy, Urban Studies, Sociology, or another social science field highly preferred.

- Candidate should have a minimum of four (4) years of experience working in the evaluation or nonprofit fields. Preference for candidates that have worked as an internal evaluator for a nonprofit organization.

- Prior experience supervising other staff is strongly preferred.

- Candidate must demonstrate solid mathematical ability, analytic thinking, project design, and research skills. Experience with qualitative and quantitative analysis, database and data system development and management, and data analysis required.

- Experience working with client management systems or similar databases required. Experience in the Efforts-To-Outcomes (ETO) software package preferred. Additional preference given to candidates that are ETO Certified Administrators.

- Knowledge of statistical packages (SAS, SPSS, Stata, R), mapping software, or database or computer programming languages a plus.

- Excellent organizational skills, creativity, and self-confidence, and the ability to multi-task and drive projects, in a motivated, effective way required.

- Should have a strong interest and prior experience in one or more of the following topics: community building and neighborhood revitalization, education, economic development, youth development, or performance management.

- Excellent written and oral communication skills required.

- The ability to work collaboratively with a wide range of community based groups and partner organizations is essential.

- The capability to adapt in a rapidly changing and organic environment.

- Prior experience working in, or reporting to, the federal government and/or nonprofit sector.

The Director of Data and Evaluation will report to the DCPNI Deputy Director.

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EDNA MCCONNELL CLARK FOUNDATION EVALUATION AND LEARNING DIRECTOR POSITION DESCRIPTION

BACKGROUND

The Edna McConnell Clark Foundation (EMCF) seeks to transform the life trajectories of vulnerable and economically disadvantaged youth, ages 9-24. We make large, long-term investments, frequently partnering with other funders, and promote effective public and private support of nonprofits with a potential for growth and compelling evidence that they can help more young people become successful, productive adults.

Foundation staff members work as a team to help youth-serving organizations build their organizational capacity and evidence of effectiveness so they can expand and sustain at greater scale programs that make a real and enduring difference in young people's lives. This work includes actively searching for prospective grantees; conducting rigorous due diligence assessments of organizations' strengths, weaknesses, and capacity for and commitment to growth; supporting the development and implementation of grantee business and evaluation plans, and performance measurement and management systems; managing highly engaged relationships with grantees and providing them with additional support; and reporting on our investments in organizations.

As they perform these and other tasks, the Foundation expects employees to uphold its core values of humility, belief in people, pragmatism, trust, and high standards.

POSITION PROFILE

In line with the Foundation's priorities, the Evaluation Director leads and directs the evaluation and learning activities and relationships for the Foundation. Reporting to the Vice President, Chief Program and Strategy Officer, the Director works across teams of staff, partners and grantees to ensure alignment with the external function, relying on his/her sophisticated and diverse analytical skills to understand and interpret quantitative and qualitative results. S/he has excellent relationship management capacity and can blend strategic and practical considerations for excellent decision making in uncertain conditions. S/he upholds the Foundation's values in all aspects of the work.

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POSITION TYPE
EXEMPT

PRIMARY RESPONSIBILITIES

- Make recommendations to the Foundation's senior leadership regarding organizational strategy and key processes related to evaluation, learning and assessment.

- Manage all activities related to evaluation, learning and performance tracking in support of the Foundation's strategy; ensure the Foundation's evaluation philosophy is upheld and advanced.

- Ensure resources are in place to develop objectives and implement impact assessment strategies that measure grantee progress and success against key programmatic and operations metrics.

- Manage the oversight and assessment of current Foundation systems related to tracking progress of Foundation and grantee evaluations.

- Identify the scope and manage external evaluations of the Foundation's work. Lead the review committees to provide effective oversight.

- Manage the work of the Evaluation Advisory Committee (EAC), including agenda setting, committee member assignments and contracts and onboarding of new committee members.

- Collaborate with key stakeholders to determine and prioritize areas of focus for rigorous impact assessment then validate with staff, key consultants, grantees, EAC Members, Board Members, etc.

- Work with portfolio team and IT staff to build capacity, implement and manage internal systems for conducting ongoing outcome measurements and assessments; lead continuous improvement efforts.

- Represent the Foundation externally on matters of evaluation, learning and performance management including speaking engagements, attending conferences and participating in other key internal and external meetings.

- Maintain sufficient knowledge and understanding of each grantee and develop and maintain relationships with grantees and partners. Become a trusted point of contact with grantee management to provide evaluation-related support.

- Ensure the highest standards of data analysis and effectively communicate implications and recommendations to grantees.

- Collaborate with portfolio managers and grantees to clarify and support grantee program evaluation milestones and needs.

- Manage consultants who provide services to either grantees or EMCF on evaluation matters.

- Oversee the external support for organizations as they (a) design, implement and use evaluation and performance tracking systems to improve program quality and effectiveness, (b) oversee rigorous, third-party impact studies when appropriate and (c) develop strong theories of change. Stay current and engaged in the evaluation field to ensure knowledge of key trends, best practices, innovation, and access to high quality evaluation resources as related to target populations and apply learning to improve the Foundation's tools and practices.

- Work with the senior team to set learning agenda priorities and ensure that those priorities are well executed.

- Partner with the Communications team to develop high quality studies, reports or research projects that are meaningful and important to key audiences.

QUALIFICATIONS

The Evaluation Director believes in the Foundation's mission of improving conditions for people who are poor and disadvantaged and is a strong advocate for advancing programs that produce positive outcomes for low-income youth.

- An advanced degree and a minimum of 10 years experience managing evaluation and assessment processes, research projects, grant making and high-level client interface is ideal.

- Strategic ability to see opportunities, and contribute to designing innovative approaches backed by strong analysis and planning.

- Outstanding interpersonal skills including the ability to work with a diverse group of peers, trustees, consultants, advisors, and grantees with different backgrounds and experiences. Proven ability to professionally represent the Foundation through interpersonal skills, intercultural knowledge and appreciation, and strategic partnership building skills. Enthusiasm for and skill in working hands-on with grantee organizations.

- Able to serve as the representative, facilitator and coordinator of program performance evaluation. A strong predisposition to work in interdisciplinary teams, providing critical independent thinking while remaining flexible in considering diverse opinions and approaches.

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- Sophisticated and diverse analytical and study design skills; facility in diverse quantitative and qualitative methods is essential. Able to design and manipulate databases, use computer-based statistical and analytical applications, and be able to design outcome and impact studies. Comfortable compiling and analyzing disparate and even contradictory qualitative and quantitative information.

- Prior consultative experience with a track record of partnering with and teaching generalists about research and evaluation concepts and methods, especially regarding the specification of outcomes and the selection of indicators and measures, is critical.• Personally aligned with the Foundation's core values, in particular an individual with the upmost integrity that exudes and engenders trust; organized, focused and results-driven demeanor with a commitment to self-development.

- Excellent written and oral communications skills, able to successfully navigate and translate information for technical and non-technical audiences.

- Strong Internet and computer skills, including extensive knowledge of Microsoft Word, Excel and PowerPoint, and the ability to master new software quickly.

- A willingness to live in the greater NYC area and travel for a significant portion (30%) of the time.

DIRECTOR, PROGRAM EVALUATION AND PLANNING
NONPROFIT POSITION DESCRIPTION

JOB SUMMARY

The Director of Program Evaluation & Planning will provide leadership of the NONPROFIT's evaluation, planning, and quality assurance activities for all programs. In addition to promoting a culture that emphasizes learning, the Director will serve as the central resource for designing and executing a comprehensive and integrated system of program evaluation; coordinate, with program leadership, the systems for responding to funder and regulatory requirements for outcomes; foster data-driven decision making throughout the organization, develop and conduct research projects; work with outside evaluators on internal studies; and develop and implement evaluative methods to review programs. The Director will also provide direction and oversight to agency-wide quality assurance, accountability and related accreditation activities.

REPORTS TO ASSOCIATE EXECUTIVE DIRECTOR

MAJOR DUTIES

- Provide vision, leadership, technical assistance and direction to the development and implementation of an agency-wide strategy for all evaluation, planning, quality assurance and accountability activities.

- Educate staff and champion the use of both program and comparative data to enhance service delivery.

- Facilitate the development and continual refinement of program evaluation agenda.

- Provide analytical support to management and line staff in the areas of program evaluation and outcomes measurement.

- Develop and support a plan to provide systematic performance monitoring to promote accountability and ensure targeted performance levels are met.

- Supervise department staff.

QUALIFICATIONS

- Master's Degree in relevant field required; Doctorate desired.

- Five or more years of experience in program evaluation, applied research, and data management in the social services and/or human services field.

- Leadership skills as demonstrated by the ability to advise senior leadership on a wide range of issues related to evaluation, planning and quality assurance strategies.

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- High level of competency in evaluation approaches (quantitative and qualitative).

- Experience analyzing complex problems and ability to recommend effective courses of action.

- Experience in planning, organizing and directing the work of professional and administrative staff.

- Experience in staff development and team building.

- Excellent interpersonal, verbal and written communication skills.

- Proficiency in MS Office and SPSS and some familiarity with Efforts to Outcomes database.

- Ability to think creatively, innovate and initiate.

GENERAL REQUIREMENTS

All staff are expected to be committed to the mission, vision, and values of the nonprofit, which includes involvement in quality assurance activities and a willingness and ability to work within a culturally diverse environment.

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DIRECTOR, EVALUATION AND QUALITY IMPROVEMENT AGENCY POSITION DESCRIPTION

DEFINITION

Under general direction, manages and supervises the Evaluation and Quality Improvement (EQI) Department, including responsibility for (1) the coordination and operation of projects related to service program and infrastructure department accountability, quality improvement, and evaluation; and (2) the maintenance and utilization of clinical health records. Participates as a member of the Executive Management Team; performs related duties as assigned.

Directly responsible to executive director supervision over proffessional, technical and clerical personnel as assigned.

DUTIES AND RESPONSIBILITIES

CLIENT ASSESSMENT AND PROGRAM ACCOUNTABILITY

- Develops and manages the implementation of programs/projects related to service program and infrastructure department accountability and evaluation projects. Examples include but are not limited to:
  - o Client satisfaction surveys
  - o Treatment effects for client functioning
  - o Intervention effects for AGENCY school students
- Implements and manages development, scoring, and interpreting of evaluation measures used agency-wide, as applicable. Examples include but are not limited to:
  - o Operational indicators
  - o Staff feedback and satisfaction surveys

QUALITY ASSURANCE, QUALITY IMPROVEMENT, AND COMPLIANCE

- Oversees the implementation of programs/projects related to service program and infrastructure department quality assurance and quality improvement;

- Manages agency-wide policies and procedures;
- Provides expertise concerning evidence-based clinical and educational practices;
- Serves as primary data resource to Advancement Department, with regard to grant proposals and reports Clinical Records;
- Oversees the implementation, maintenance, and utilization of agency health records, including development of the electronic health record (EHR) and planned termination of paper health record;
- Manages agency-wide training related to use of EHR;
- Provides expertise concerning application of EHR-held data to agency business and service practices;

CONTRACTS AND GRANTS

- Develops and manages evaluation contracts with other non-profit agencies, as needed. Contracts can include:
  o Training services
  o Technical assistance services
  o Individual program evaluation services
- Collaborates in clinical research projects, as needed. Collaboration can include:
  o Study coordination
  o Maintenance of IRB approval
  o Study participant recruitment
  o Data collection, processing, entry, analysis, and interpretation
  o Presentation and publication of study results

ADMINISTRATION

- Plans, organizes, and manages the ongoing operations of EQI
- Selects, trains, supervises, and evaluates the performance of EQI staff
- Develops, monitors, and manages EQI budgets
- Serves as liaison between AGENCY and local/county service agencies in matters relating to EQI work (e.g., evaluation, QA/QI)
- Serves as AGENCY representative to county/state/national organizations in matters relating to EQI work (e.g., EHR)
- Coordinates and manages contracts with grantors and sub-contractors

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- Complies with budget and expenditure contract requirements
- Plans and monitors EQI timelines to meet strict deadlines
- Coordinates the overall implementation of projects
- Coordinates the preparation, administration, compilation, and reporting of EQI activities.

EXECUTIVE MANAGEMENT TEAM

- Participates as a member of the Executive Management Team, with leadership of agency committees including:
  - o   AGENCY Research Committee
  - o   Electronic Health Record Implementation Committee
  - o   Critical Incident Review Committee
- Serves as HIPAA Privacy Officer, HIPAA Security Officer, and Compliance Officer
- Reports to and participates in AGENCY Board meetings and Board committee meetings (e.g., Schools Advisory Committee, Clinical Services Committee)

MINIMUM QUALIFICATIONS

EDUCATION, TRAINING, AND EXPERIENCE

Possession of an advanced graduate degree is essential, with emphasis on clinical and educational research design, evaluation/assessment, and statistical analysis. Extensive experience in research, assessment, evaluation, and quality improvement services and management of large-scale assessment/evaluation contracts and projects is critical. Broad and current understanding of federal requirements for EHR is essential, in addition to experience leading EHR implementation. Desirable attributes include: active clinical license, experience working in nonprofit community organizations.

KNOWLEDGE

Research, assessment, and evaluation strategies appropriate for preschool through high school students and educational programs. Clinical services, including mental health, developmental, and behavioral services. Methods of communication among community-based agencies, academic medical settings, and private practices on a countywide, regional, and state basis. Psychometric aspects of testing and computer applications used in technical writing, budgeting, and data analysis. Evidence-based practice. Electronic health records (EHR), federal requirements for EHR; regional compliance with EHR mandates.

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SKILLS AND ABILITIES

- Plan, organize, and supervise an agency program of assessment, evaluation, and quality improvement services including small and large-scale client outcome and satisfaction assessments

- Implement, maintain, and maximize utilization of a health agency EHR

- Write grant and contract proposals

- Conduct program evaluations and program accountability projects

- Develop and control an extensive budget

- Organize EQI's work to meet strict deadlines

- Lead and coordinate assessment and accountability projects required by county, region and statewide agencies

- Develop and maintain positive working relationships with all persons contacted in the course of work

- Communicate effectively in both oral and written form to present ideas and concepts clearly and concisely to others

- Utilize analytical skills to research, acquire, and evaluate appropriate data for effective problem solving and/or decision making

- Select, train, and supervise staff

CONGRESO DE LATINOS UNIDOS
POSITION DESCRIPTION

Position: Data-Evaluation Director	**Division: Administration**
Reports to: Chief Financial Officer	**Department: Quality Assurance**
Revised: July 2015	**FLSA Status: Exempt**

POSITION SUMMARY

The Data-Evaluation Director is primarily responsible for the strategic oversight of the Data-Evaluation department which informs program outcomes. This position directs the research, analysis and development of outcome indicators, as well as the procedures and tools needed for each program to satisfactorily meet their goals and outcomes. The Data-Evaluation Director works closely with Coordinators and Managers to develop each program evaluation framework, and will monitor the appropriate implementation of Congreso's evaluation strategy. The Data-Evaluation Director oversees the operations of the agency's Social Solutions ETO system UNIDAD, ensures proper tracking of outcomes through the system's reporting features, and develops publications leading to the dissemination of best practices and program results. This position also is responsible for coordinating the evolution of the 'agency's service delivery model which is data-driven.'

The Data-Evaluation Director has internal contacts with the entire administrative staff and external contact with the business community. This position has access to sensitive Congreso client information and is expected to handle such information with integrity and professionalism. This position has regular contact with members of the community and is expected to represent Congreso in a professional manner.

The Data-Evaluation Director directly supervises the Data-Evaluation department staff. The Data-Evaluation Director reports to the Chief Financial Officer and participates in department activities as necessary.

STRUCTURING A DIRECTOR OF OUTCOMES & EVALUATION POSITION

ESSENTIAL FUNCTIONS

EVALUATION AND PERFORMANCE MANAGEMENT

- Oversees the implementation of evaluation and performance management efforts across the agency.

- Encourages the use of data to inform services, and identify data that could be collected to increase data use at all levels.

- Direct the implementation of Congreso's PCM™ service delivery model.

- Collaborates with Managers and Coordinators on the development Congreso's Program Evaluation Initiative.

- Supports the development and update of specific success indicators and outcomes that are suitable and realistic for each program.

- Implements a mechanism to best monitor outcome-based indicators agreed upon through UNIDAD and other means. Assess and adapt program outcomes to satisfactorily achieve measurement methods.

UNIDAD/ETO

- Supports the planning, development, and implementation of Congreso's UNIDAD/ Social Solutions' data management system.

- In consultation with the CFO, the technology team and Social Solutions, Inc., the DDE develops the system's guidelines and standards for UNIDAD's appropriate use. Also, develops and supports a training plan for staff.

- Monitors UNIDAD's information at all times. Produces data summaries to programs and Executive team for reporting and fundraising purposes. Additionally, the DDE will serve as the agency's primary contact to extract community and program-specific information from UNIDAD.

PROGRAM DATA AND REPORTING

- Analyzes departments reports and provides strategic summaries of information to agency leadership teams.

- Directs the development of Congreso's performance management and evaluation strategies.

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- Develops and updates forms to collect client data and information from all programs. Use this information for:
    - o Implementing performance management strategies at the program level.
    - o Establish data systems and program processes to effectively monitor and report contract deliverables.
    - o Reporting results of Congreso's evaluation initiatives through reports including the Agency Score Card and especial reports for the Board.
- Provides technical assistance support to Congreso's programs so that client data and information is collected more efficiently and effectively.

PUBLICATIONS

- Explores and shares best practices for Congreso's programs, as developed within the local and national human service field. Produces, edits and distributes Congreso's reports that include data and evaluation components such as the Agency Score Card, annual reports, and website.

COMMUNITY AND PARTNERSHIPS

- Represents Congreso in forums, conferences, and meetings with funders, partners and policy-makers when outcomes, best practices, and community information is required.
- Supports the development of partnership with Universities and community partners to further Congreso's data and evaluation strategy.

OTHER

- Participates in management meetings, staff-meetings, program-related meetings and executive team meetings as required.

MANAGEMENT FUNCTIONS

- Provide management of the Data-Evaluation department and staff through independent judgment and decision-making.
- Regularly direct the work of and provide staff development opportunities and training to department support staff.
- Perform management functions for the department and/or make recommendations for hiring, firing, performance evaluations, disciplinary counseling, salary recommendations, workload distribution, communication, recognition activities, and employee relations.

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- Prepare a departmental budget, participate in the organization's budget preparation process, and operate within budget limitations.

NON-ESSENTIAL FUNCTIONS

- Attend relevant workshops or join professional groups as necessary to maintain professional knowledge and licensure.

- Adheres to the Congreso's security guidelines and ensures the appropriate handling of sensitive information.

- Facilitates and attends relevant staff meetings to promote communication and execution of goals.

- Completes special projects specific to the function of the department or as needed for the department as directed by Supervisor.

- Other duties as assigned within the scope of position expectations.

KNOWLEDGE, SKILLS, AND ABILITIES
(CAREER PATHWAY: QUALITY ASSURANCE)

ALL STAFF COMPETENCIES

- Basic understanding of Congreso's mission, vision, values, programs and services, and business plan.

- Knowledge and understanding of the targeted community needs and demographics.

- Understanding of legal criteria for issues such as confidentiality, domestic abuse, child abuse, and mandated reporter requirements.

- Ability to provide nonviolent intervention with a high level of ethical standards of conduct, cultural sensitivity and within appropriate boundaries and limits.

- Ability to effectively use standard office equipment.

- Possesses strong interpersonal skills as demonstrated by compassionate, courteous, cordial, cooperative, and professional interaction with diverse groups of co-workers, external business partners, and the community.

- Ability to operate a computer and use a variety of common software programs including Microsoft Office, spreadsheets, UNIDAD, and customized databases.

- Adheres to all Congreso and departmental policies and procedures.

- Attends all Congreso in-services as required.

- Strong written and verbal communication skills and effectively communicate with individuals and groups.

- Bilingual (Spanish/English).

QUALITY ASSURANCE STAFF COMPETENCIES

- Proven excellent computer proficiency, including knowledge of databases such as MS Access and MS-SQL, statistical software such as SPSS, spreadsheets, and use of research-related sources for health, education and other human-service programming.

- Strong ability to analyze performance indicators and statistical trends to support recommendations and evidenced-based decision-making.

- Ability to demonstrate a high level of content knowledge around legal/political policies and issues affecting program compliance.

- Ability to assess Congreso staff competencies.

- Ability to demonstrate sustained efforts to move clients to targeted outcomes.

- Ability to apply a sophisticated understanding of performance management, data driven performance reviews and compare and evaluate data against goals and objectives.

- Ability to identify and develop performance based outcomes.

- Ability to measure and understand organizational performance measures.

- Ability to monitor contract compliance and insurance directives.

- Understanding of Sarbanes-Oxley implications on the organization and Board.

- Skill in preparing and editing correspondence and documents to produce final documents, educational lesson plans, reports, and presentations.

- Ability to measure and understand organizational performance measures.

- Ability to monitor contract compliance and insurance directives.

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STRUCTURING A DIRECTOR OF OUTCOMES & EVALUATION POSITION

EXPERIENCE, EDUCATION, AND LICENSURE

Minimum Experience: 4-5 years of experience in program research, development and evaluation. Demonstrated success in research and analytical results and outcomes is required.

Minimum Education: BA/BS degree from an accredited college or university in a related field of study with 4-5 years of related work experience; Master's Degree in Public Health, Social Work, or related field is preferred.

PHYSICAL DEMANDS

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- While performing the duties of this job, the employee will frequently stand; walk; sit; use hands to finger, handle, or feel objects, tools or equipment; reach with hands and arms; balance; talk or hear. The employee will occasionally climb stairs; stoop; kneel; crouch or crawl; taste or smell.
- The employee must occasionally lift and/or move up to 25 pounds.
- Operate related office equipment and use necessary tools.
- Specific vision abilities required by the job include frequent reading and close vision; distance vision; color vision; peripheral vision; depth perception; and the ability to adjust focus.

WORK ENVIRONMENT

The work environment characteristics described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- The noise level in the work environment is usually moderate.
- Although work is primarily indoors, you may be required to travel outside to client and community locations.
- Position may require occasional trips to attend conferences seminars and meetings.
- Certain visits or work related appointments might be scheduled outside of traditional work hours as necessary.

Nothing in this position description restricts management's right to assign or reassign duties and responsibilities to this job at any time.

STRUCTURING A DIRECTOR OF OUTCOMES & EVALUATION POSITION

CONGRESO DATA EVALUATION DEPARTMENT ROLES

Area	Data & Evaluation Director	Data & Evaluation Reporting Coordinator	Data and Evaluation Specialist	Data & Evaluation Support Specialist
Primary Responsibility	Manage and represent the Data and Evaluation department	Data Base configuration, advanced reporting, and advanced staff support.	Data Base configuration, advanced reporting, and advanced staff support.	Conducts ETO trainings, both one on one and group. Primary staff support contact as ETO help desk.
Internal				
Ensure a strong Data & Evaluation	Oversee team professional development, project managed, and support team achieve high quality and timely support	Coordinate with team member to collaborate on projects. Identify areas for personal growth and professional development.	Coordinate with team member to collaborate on projects. Identify areas for personal growth and professional development.	Coordinate with team member to collaborate on projects. Identify areas for personal growth and professional development.
	Cover projects and requests for the rest of the team as needed	Cover projects and requests for the rest of the team as needed	Cover projects and requests for the rest of the team as needed	Cover projects and requests for the rest of the team as needed
	Test new features and maintain and stay to date with ETO	Test new features and maintain and stay to date with ETO	Test new features and maintain and stay to date with ETO	Test new features and maintain and stay to date with ETO
Supervision	Supervises 3 full time staff and supports divisional QA Managers	n/a	n/a	n/a
Database Maintenance				
Security	Establish and implement security policies	Monitor implementation security policies and identify risk areas	Monitor implementation security policies and identify risk areas	Monitor implementation security policies control of ETO accounts (adding and removing access)
Update ETO	Conducts random drill downs of data for accuracy and completeness	Conducts random drill downs of data for accuracy and completeness	Conducts random drill downs of data for accuracy and completeness	Conducts random drill downs of data for accuracy and completeness*
	Audit department time allocation and reports	Monitors data accuracy and completeness for selected initiatives	Monitors data accuracy and completeness for selected initiatives	Monitors data accuracy and completeness for demographics and indicator data
	Design and review ETO blue prints before implementation. Customize ETO according to blue prints.	Design of ETO blue prints and customizes ETO features	Design of ETO blue prints and customizes ETO features	Customizes ETO features based on program blue prints.

CONGRESO DATA EVALUATION DEPARTMENT ROLES

Area	Data & Evaluation Director	Data & Evaluation Reporting Coordinator	Data and Evaluation Specialist	Data & Evaluation Support Specialist
		Carry out batch uploads to maintain ETO up to date and serve as main data source for Congreso	Carry out batch uploads to maintain ETO up to date and serve as main data source for Congreso	Corrects enrollment, merge duplicates and fix family errors as part of ETO help desk function
				Assist department in cleaning up data at agency level.
Research and Development	Research evaluation strategies, and ETO updates to support with program design	Research evaluation strategies, and ETO updates to support with program design	Research evaluation strategies, and ETO updates to support with program design	Research evaluation strategies, and ETO updates to support with program design
Reporting	Prepares ad hoc reports and data analyses .	Prepares ad hoc reports and data analyses .	Prepares ad hoc reports and data analyses .	
Scheduled Reporting	Support team with report completion and audit results.	Annual score card report.	Prepares monthly divisional reports and PCM Compliance Reports.	Runs Gaps Reports, Duplicate Reports and Family Reports on a monthly bases monitor compliance and data quality.
Other Reporting	Runs ad hoc queries and analysis for Exec Cab and support team with the completion of agency requests.	Runs ad hoc queries, support development complete sections grant forms related to data and evaluation	Runs ad hoc queries, support development complete sections grant forms related to data and evaluation	Runs ad hoc queries in coordination with team support
	Meets regularly with Development team for proposals and reports and provides needed data ongoing	Configure and maintain ETO Result Reports. Prepares GIS reports.	Configure and maintain ETO Result Reports	
	Provides analysis of all reports that department produces	Conducts data analysis and research to put data reports into context	Conducts data analysis and research to put data reports into context	
	Creates custom program reports in ETO for staff use	Creates custom program reports in ETO for staff use	Creates custom program reports in ETO for staff use	
Program and Staff Support	Audit agency protocols and strategies for program and agency level initiatives	Provides advanced staff support	Provides advanced staff support	Fields all staff issues/ questions and serves as internal ETO help desk
	Serves as back up for training sessions	Serves as back up for training sessions	Serves as back up for training sessions	Primary responsible for training staff on ETO to meet program data needs

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STRUCTURING A DIRECTOR OF
OUTCOMES & EVALUATION POSITION

CONGRESO DATA EVALUATION DEPARTMENT ROLES

Area	Data & Evaluation Director	Data & Evaluation Reporting Coordinator	Data and Evaluation Specialist	Data & Evaluation Support Specialist
	Assist with design of manuals and support documents	Assist with design of manuals and support documents	Assist with design of manuals and support documents	Develops and updates all protocols and training manuals related to ETO
Meetings	Sits on internal Evaluation Advisory Committee, QA Team, Agency Management Team, and ENPYS meetings	Sits on internal Evaluation Advisory Committee, QA Team, and Agency Management Team	Sits on internal Evaluation Advisory Committee, QA Team, and Agency Management Team	Sits on QA Team, and Agency Management Teama
	Meets with programs regularly to evaluate data needs to plan and implement data management systems	Meets with programs regularly to evaluate data needs to plan and implement data management systems	Meets with programs regularly to evaluate data needs to plan and implement data management systems	Meets with programs regularly to audit data and address challenges.
	Provide strategic analysis to programs, department and for the agency as a whole on special projects	Provide strategic analysis to programs, department and for the agency as a whole on special projects	Provide strategic analysis to programs, department and for the agency as a whole on special projects	
External				
	Provides consulting as appropriate to other existing or potential ETO users.	Provides consulting as appropriate to other existing or potential ETO users.	Provides consulting as appropriate to other existing or potential ETO users.	
	Serves as agency liaison for external interface projects.	Serves as agency liaison for external interface projects.		
Key Skill Set				
	Advanced Excel and Access Skills. Knowledge of ETO software preferred. Knowledge of SAP Business Objects, Web Intelligence, Live Office, GIS and SPSS a plus	Advanced Excel and Access Skills. Knowledge of ETO software preferred. Knowledge of SAP Business Objects, Web Intelligence, Live Office, GIS and SPSS a plus	Advanced Excel and Access Skills. Knowledge of ETO software preferred. Knowledge of SAP Business Objects, Web Intelligence, Live Office, GIS and SPSS a plus	Advanced Excel Skills. Knowledge of ETO software preferred.
	Supervision	Detail-oriented, Customer service-oriented	Detail-oriented, Customer service-oriented	Detail-oriented, Customer service-oriented
	Analytical	Analytical	Analytical	Analytical