

Contrary to perceptions of North Texas' high income levels, CFED's 2012 Asset & Opportunity Profile for Dallas showed the region's asset poverty to be worse than the national average. Sarah Cotton Nelson, Chief Philanthropy Officer, and Wende Burton, Community Philanthropy Director, both of Communities Foundation of Texas (CFT), were tasked in 2012 with building a program from scratch to creatively address this challenge.

CFT had not been involved previously in the space, nor were peer funders locally. A study of the region showed that there were few nonprofits explicitly working at or above the poverty line (rather than below), and those that were, stated that they needed more information about "the working poor" on which to base programming decisions -- along with help knowing how to incorporate new data into their strategy going forward if it were provided to them.

Sarah's background at RAND and personal vision for making quality research accessible and relevant to the nonprofit sector, combined with Wende's experience and passion around bringing organizational change and process improvement tools to the work, created a dynamic duo in the fight toward improving economic stability across the community.

Toward this end, in 2012 Sarah and Wende launched the Data-Driven Decision-Making (D3) Institute —a year-long data, analysis, and strategic integration bootcamp (and learning community) designed specifically for organizations serving low-income families across the Dallas-Ft. Worth Metroplex.

By Fall 2014, almost 50 agencies can be counted as participants. Funding this program was initially perceived as a risk within CFT, whose trustees previously preferred to fund work directly vs. (less direct) capability building. Today, based on the feedback of participants, however, trustees have embraced D3 as a wise investment in the community as whole. One of the early outcomes of the program was a shift in behavior in the collection of large amounts of insignificant data—instead moving toward a more focused approach to collecting and using data that informs strategic direction in program development, formation and evaluation of collaborative partnerships, and program service implementation. Several unplanned outcomes additionally surfaced:

- Future Institute Opportunities—CFT has been approached by the arts and education sectors to conduct a D3 Institute for their constituents.
- Increased Trust and Connectedness—Participants began D3 with "hesitation to share because of competition, but D3 helped to break some of the walls down to move from competitor to compatriot."
- Innovative Funding Leader—CFT is one of the only community foundations to fund nonprofit capacity-building, and is asked to speak by Philanthropy Roundtable and the Asset Funders Network to encourage others.

CFT's D3 Institute has also been featured in The Chronicle of Philanthropy. Beyond D3, Sarah and Wende raised awareness and knowledge of challenges facing working families by partnering to found a DFW chapter of the Asset Funders Network. Today, four learning events are held a year, engaging 40+ grantmakers and 175+ nonprofit practitioners to learn alongside each other. "This work is not about fixing problems but about empowering people," said Wende Burton. "It's why I've always loved organizational change."

Data-Driven Decision-Making (D3) Institute
Communities Foundation of Texas, Sarah Cotton Nelson and Wende Burton
Scrivner Award for Creative Grantmakers

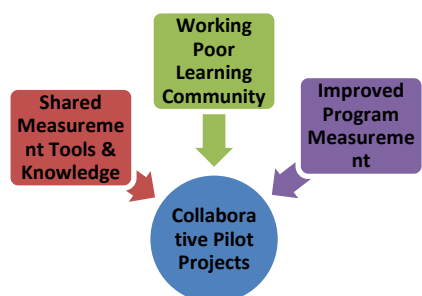
Better understanding of the working poor. Recognizing the need to improve the economic security and stability of working families living at and above the poverty line, CFT trustees in 2009 selected Economic Security of the Working Poor for discretionary funding in its Community Impact Grant area. The goal was to first help the community better understand the current issues and challenges the working poor face and then convene and align service providers as CFT's greatest point of leverage. FSG Social Impact Advisors was engaged in the summer of 2010 to review and assess the Dallas landscape to identify the best areas of entry for CFT involvement and funding. FSG found that very few funders concentrate on the working poor and that the available data on this population locally were limited and out of date. FSG also identified a need for capacity building to help nonprofits learn how to best apply data, when made available, within their organizations, and to eventually develop shared measures across the nonprofit community.

At the end of 2011, CFT contracted with the Corporation for Enterprise Development (CFED) to produce an Assets & Opportunity Profile for Dallas in conjunction with the Thomson Family Foundation. The profile, released in February 2012, provided the community with a better understanding of wealth, poverty, and opportunity across the City of Dallas, Dallas County, and the 12-county North Texas region. Contrary to common perceptions of North Texas' relatively high income levels, the report showed that the region's poverty is worse than the national average and that financial insecurity both destabilizes families and jeopardizes the long-term vitality of cities and local economies, making the report relevant on multiple levels.

Leveraging the study's findings: the D3 Institute. To support the nonprofit community in addressing the findings of the study as well as the need for capacity building, CFT launched a pilot program in 2012 called the **Data Driven Decision-Making (D3) Institute** to provide organizations offering programs and services for low-income families the power to accelerate the development of enhanced solutions to the social and economic problems facing their clients. The D3 Institute was designed so that organizations could accomplish the following:

- Develop a shared understanding of the current issues and areas of need for low-income families, based on current available data
- Implement and/or expand the use of data in strategic decision-making and as a part of program development
- Expand participants' (and CFT's) network of resources and support, including sharing best practices through participation in a learning community

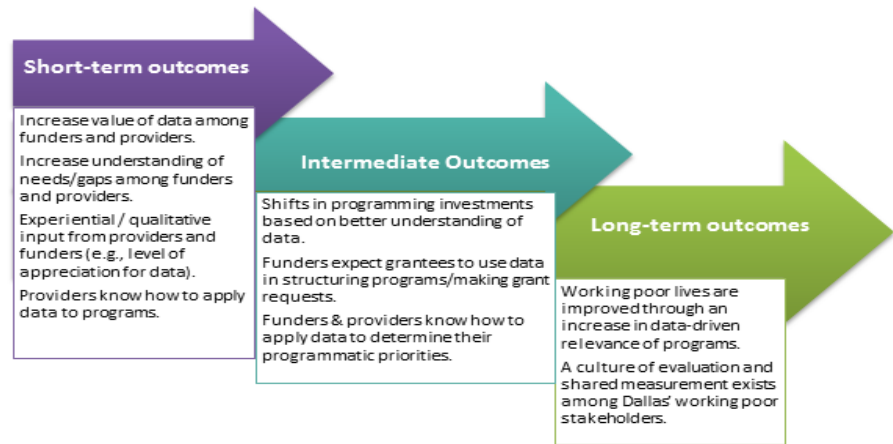
The institute consisted of learning opportunities for personnel at all levels of participating organizations, including leadership and program staff. An initial cohort of 16 nonprofits was selected in July 2012 through a competitive application process, and each agency was asked to make a 12-month commitment to program participation.



The selected agencies participated in a series of workshops focused on using and applying data and were provided with up to 40 hours of one-on-one coaching on the use of data and evaluation to inform decision-making. Monthly workshops also provided time for networking and relationship-building between agencies. Grantees were also given a general operating grant of

\$10,000 per organization in appreciation of the time and effort required to participate.

Finally, all agencies participated in at least one collaborative group project and were provided the opportunity to apply for additional working poor specific program grants based on the output of the project work.



Short- (immediate), intermediate- (1-3 years), and long-term (5+ years) outcomes were defined to identify and track the impact on nonprofits, with an assumption that by increasing the capacity and effectiveness of agencies that serve the working poor, individual clients would ultimately benefit through the application of better services.

What impact has the D3 Institute had on participants? The intended outcomes for Institute participants were identified as follows:

- Develop an understanding of key data/evaluation terms.
- Increase participants' appreciation of the value of data, and better understand how they can use data to inform programming and strategic planning.
- Become part of a learning community through participation in the institute.
- Increase awareness of cross-sector needs of, and gaps in service to, the working poor.

Overwhelmingly the participants and their executive leadership found great value in the D3 Institute. The curriculum benefited individual participants directly and made a positive impact on their organizations when information was shared with other staff. Final surveys show that the participating agencies progressed from “occasionally” using data (baseline survey) to “regularly” using data—a notable shift in self-reported behavior from the beginning of D3. Also participants reported a shift in behavior in the collection of large amounts of insignificant data, moving toward a more focused approach to collecting and using data that informs strategic direction in program development, formation and evaluation of collaborative partnerships, and program service implementation.

While D3 Institute participants and coaches reported the Institute needed more emphasis on the specific needs/gaps of the working poor, more than half of the participating agency executives reported a heightened awareness of the need to explore agency impact on serving the working poor community as a whole, versus serving with singularly focused programming, with seven of the agencies currently pursuing and building stronger collaborations with other D3 agencies to support gaps in services.

“We were surprised by how well our very different organizations came together to work on a common challenge. It was unclear at first how we could all come up with one idea to address our challenges, but through collaboration and communication, we were able to create something that addressed the root of our challenges.” D3 Participant

What did we learn, and what is the path forward? In reviewing the outcomes and evaluations from the initial cohort of nonprofits, CFT found that organizations that are further along on the spectrum of data-driven decision-making are more likely to be actively providing best practices in programming and

collecting and using data than less-established organizations. As a result, such organizations are serving the broader community that serves the working poor with information that can be used to shape better services and programs. The evaluation further showed that agencies that are most successful in data-driven decision-making exhibit four key characteristics (1) strong leadership, (2) investment in technology that supports data gathering and analysis, (3) data-focused personnel, and (4) organizational commitment to using data to inform and drive strategic direction. This will be key information to consider when selecting future cohort groups.

Furthermore, CFT implemented a pre-D3 seminar in 2013 for agencies that may not be ready for the D3 Institute, based on the above-stated key characteristics of successful participants to enhance current data-collection practices. It is too early to see whether this intervention was effective in preparing agencies for potential selection in the upcoming 2014 cohort.

Also, while CFT was evaluating and tracking for the above outcomes, several unplanned outcomes surfaced, which further reinforce the soundness of the D3 Institute in supporting nonprofits by developing their capacity related to the use of data and evaluation.

- **Future Institute Opportunities**—CFT has been approached by other sectors to conduct a D3 Institute for their constituents. This outcome is a direct result of participants sharing information about the impact of D3 across the Dallas-area nonprofit sector.
- **Increased Trust**—Agencies communicated an increased level of trust being built between fellow D3 agencies as well as within the funding community. Participants reported coming to D3 with a level of *“hesitation to share because of competition, but D3 helped to break some of the walls down to move from competitor to compatriot.”*
- **Long Term Reporting**—Agencies have started to expand program evaluation—from capturing and analyzing data specific to the impact on individual clients to the impact on the community. Two D3 agencies supporting home buying for the working poor have reported implementing a long-term strategy to support the future success of clients by surveying 24 and 36 months post-home purchase and by collecting data to communicate the impact of homeownership on the community. Such data will have long-term benefits to the community as a whole.
- **Promoting CFT as an Innovative Funding Leader**—CFT is one of the only community foundations nationally to fund this type of capacity-building for nonprofits, and as a result CFT is getting speaking requests from national organizations, including the Philanthropy Roundtable and the Asset Funders Network. CFT’s work with the D3 Institute has also been featured in *The Chronicle of Philanthropy* and the *Stanford Social Innovation Review*.

Key links:

- [D3 Institute website overview](#)
- Testimonials from the first D3 class: [This](#) shows a few quotes from the class that just finished, [these](#) are more quotes about program, and [this](#) is an article about the coaches.
- [Overview of CFT’s working poor approach](#)
- [Assets & Opportunity profile for Dallas](#)

*****Very important video link of executive director testimonials of the power of D3 for their agencies:**

- <https://www.hightail.com/download/ZUczaXREMGNwcfVaQ2NUQw>

D3 Baseline Survey: Executive Director & Participant Interviews

- *“As an Executive Director who is participating in the institute, I am using this time to be able to network and connect with possible collaborators in our community. The institute is providing the perfect setting to be able to be better informed on the programs and services that can enhance or grow our current programs.” – D3 Institute Executive Director, AVANCE*
- *“My staff are coming back from the sessions with a renewed energy. They are bringing information back, providing debrief for the whole staff and working to implement the information shared at the session.” – D3 Institute Executive Director, H.I.S. Bridgebuilders*
- *“During our last coaching session, our coach was able to help us look at one of our programs (pet therapy) and provide direction on the opportunity to collect, analyze and share data on the impact the program has on our clients. We had never considered our pet therapy program as a program that we could measure and/or report. From that session we are now looking at all of our “out of the box” programs to determine if there is opportunity to gather and share data.” - D3 Institute Executive Director, Genesis Women’s Shelter*
- *“Every time we have a session I come back and talk to Anne about new and innovative things I didn’t know about. From the logic model session we were able to bring back a way to make our program logic model better.” - D3 Institute Participant, AVANCE*
- *“The topics presented to date have been excellent. We are looking at our data differently. As we think about the data we are collecting from our students, it is no longer about how much data, but more about asking the question –how is this data going to be used to impact our decision making for our programs.” - D3 Institute Executive Director and Participant*
- *We are so grateful for the opportunity to be a participant in D3. I can’t imagine having not gone through the process. I am thankful that CFT saw the value in LIFT participating. It has been a highlight of the past year. We also appreciate the ancillary benefits of participation: networking, heightened brand awareness and being seen amongst the leaders in the sector. - D3 Participant, LIFT*
- *“The Ladder of Inference exercise, that in itself has been a help to me because when I’m talking about doing something I’m thinking differently on how to get to the right decision and apply the ladder exercise to my decision-making. - Session Two D3 Participant, Builders of Hope*

From: Teresa Jackson [<mailto:teresa@sharinglifeoutreach.org>]
Sent: Friday, May 02, 2014 10:02 AM
To: Wende Burton
Subject: 15 Faithful Friends Honoree



Dear Wende,

The year 2014 marks the 15th anniversary of Sharing Life Community Outreach demonstrating compassion to people in need in our community. While reflecting on the successes experienced through the years, the board of directors and I remembered your many contributions. Without your selfless generosity and advocacy, Sharing Life would not have accomplished so much. The relationships we share with the Communities Foundation of Texas and the D3 Institute have made our organization stronger and more appealing to future donors. Because of this, we would like to honor you as one of our 15 Faithful Friends.

We will be hosting a meet and greet reception on May 20, 2014 at Sharing Life from 5:30 PM to 7:00 PM to announce the roster of our 15 Faithful Friends. During this time together, a videographer will be present to interview you. Please think about how you will answer the question, "Why have you given time and resources to the ministry of Sharing Life?"

Our annual gala is scheduled for Thursday, August 28, 2014 at the Mesquite Convention Center at 7 PM. The theme for the evening will focus on celebrating you, our 15 Faithful Friends.

Please accept our deepest gratitude for all you have done for Sharing Life and accept this nomination so we may honor you as our Faithful Friend.

Serving together,

Teresa Jackson

CEO

Sharing Life Community Outreach, Inc *Demonstrating Compassion*

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LEARNING TOGETHER

Data-Driven Decision-Making (D3) Institute brings 16 nonprofits together

CFT'S D3 INSTITUTE supports nonprofits that provide services to low-income working families, giving those organizations tools they can use to accelerate solutions to the social and economic problems facing North Texas. The 16 selected agencies are at the tail end of a rigorous 12-month curriculum focused on data and evaluation.



“Participating in the D3 Institute has pushed us beyond community-level metrics to look also at family-level metrics and how our programming affects our partner families in the short- and long-term,” said **Jane Massey**, director of neighborhood research and revitalization for **Dallas Area Habitat for Humanity**. “In fact, later this year we plan to launch our first comprehensive survey of all our current homeowners (1,000+ families!) to

learn how their lives have changed since purchasing their homes.”

Justin Banta, strategic development manager of **H.I.S. Bridge Builders**, remarked how the new evaluation and reporting tools they have created as part of D3 are helping them achieve a greater level of accountability to their board, donors and the clients they serve. “Our Community Employment Services program now has over 53 service outcomes that we track and report on, which help us ask smarter questions about continuing to improve and help people in ways we hadn’t previously considered,” said Banta.

“The energy in the room is contagious, and it’s been an invaluable opportunity to network with other nonprofits to learn how they’re using data to better serve their target populations,” said **Claire Grant**, grants manager for **Genesis Women’s Shelter**. Banta agreed: “As a result of the D3 process, we are still meeting regularly with a group of D3 agencies that we previously had little to no relationship with in order to coordinate services and develop a lasting learning and resource sharing network.”

SUPPORT for the WORKING POOR



The D3 Institute has helped us implement best practices in data collection and evaluation, and the opportunity to network with area organizations who also serve the working poor opened the door for new collaborations. LIFT is honored to participate in the D3 Institute!” — LIFT



“Participating in D3 has been an awesome blessing for our organization and came at the right time for us. It has allowed us to not only have a coach to help research the best programs out there, but also paired us with other organizations using the software we were considering. It has provided us with best practices to achieve greater future results.” — Damon R. Polk, Chief Operating Officer, Builders of Hope



“The collaborative and supportive environment fostered by the D3 Institute is helping Dallas Area Habitat for Humanity refine its program evaluation methodology. Thanks to the D3 Institute, we will be better able to assess our programs’ impact on low-income families and share that knowledge with our donors, volunteers, partner nonprofits, and the greater Dallas community.” — Erin Hooper, Manager of Foundation Relations, Dallas Habitat

AGENCIES SUPPORT PEERS

North Texas Food Bank leaders provide valuable coaching

Another valuable aspect of the D3 program was the 40 hours of one-on-one data coaching sessions provided to each agency throughout the year. **Kim Aaron** and **Richard Amory**, senior leaders at **North Texas Food Bank (NTFB)**, are two such coaches providing expert guidance to help agencies implement the evaluation concepts being taught. But what drives them to spend time helping other agencies?

“At the food bank, we often ask ‘do we have the right information to make that decision?’ Having the opportunity to work with other nonprofit organizations as they consider how to best use their data to make better decisions was impossible to resist.” —KIM AARON



“The nonprofit sector is very heart-driven, which is a real strength when you want to engage people in your mission, but doesn’t always result in the best service to the community. I became a data coach because I wanted to join CFT’s conversations about the collective powers of knowledge creation in Dallas, and I knew I would learn as much as any organization I might have the privilege to coach.”—RICHARD AMORY

One Crisis Away

As an extension of CFT's work with the D3 Institute, Wende Burton and Sarah Cotton Nelson of CFT gathered other local funders and partnered with their local public broadcasting station KERA to create a public education program to increase community knowledge of the issues facing the working poor.

KERA's *One Crisis Away* series focused public attention on a significant North Texas societal and economic problem. According to a study by the Corporation for Enterprise Development, one in three North Texans do not have sufficient assets to live for three months at the federal poverty level if they face a financial crisis. The problem's known as asset poverty, and it doesn't discriminate. A job loss, health emergency, even legal trouble is enough to plunge a third of our friends and neighbors into financial distress.

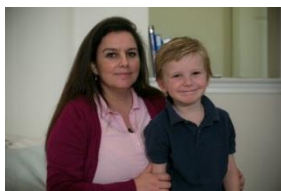
The five-month *One Crisis Away* project included 25 radio reports, an hour-long televised special, online blogging, conversations on *Think* with Krys Boyd, and a public forum at the Dallas City Performance Hall attended by more than 350 people. At the heart of KERA's series *One Crisis Away* were the stories of four families on the financial edge. Two listening sessions with representatives of community organizations were held in Dallas and Fort Worth to launch the project, and their participation shaped *One Crisis Away*. Several nonprofits featured were D3 agencies.

Four Families Bravely Share Their Stories

KERA's news team profiled four families on radio, online and in video; their stories are available at www.kera.org/onecrisisaway.



Schnique and JC Dory are a **White Settlement** couple raising two children in the Fort Worth suburbs. JC and Schnique have full-time jobs but their biggest challenge is coping with debt. Their game plan is hard work and strong faith.



Natalie Berquist was laid off from her job and had trouble making ends meet. Even with a new full-time job, she struggles financially to support herself and her young son.



Shirley Martin is a **72-year-old** retiree in DeSoto and a breast cancer survivor. She takes in boarders through a nonprofit called Shared Housing and uses her small retirement to stay afloat.



Isac Madrid had a disease that forced him to have a liver transplant, and it stretched his young family to the limit financially. Isac recently died after a second stem cell transplant.

KERA Radio: 31 news reports aired during *Morning Edition* and/or *All Things Considered* on KERA 90.1 and were made available online. *Think* with Krys Boyd featured these interviews which were made available through podcasts on the *One Crisis Away* web page:

- Jennifer Ware, CEO of YWCA of Dallas and Todd Mark, Vice President of Education at Consumer Credit Counseling Services of Dallas
- Molly Bogen, Executive Director at Senior Source and Millie DeAnda, Director at the Dallas Area Agency on Aging
- Dwain Schenck, author of *Reset: How to Beat the Job-Loss Blues and Get Ready for Your Next Act*
- Thomas E. Murphy and Crystal Billing, certified financial planners
- Scott Griggs, vice chairman of the Dallas City Council housing committee, and Ken Smith, who leads the Revitalize South Dallas Coalition
- Harry Gantz, director of the documentary *American Winter*

Televised Special: KERA produced *One Crisis Away*, a one-hour special based on the public forum and including video of the four families. The broadcasts on March 27 and March 30, 2014, reached an audience of 32,000 people.

Public Responses to KERA's Radio and Online Reporting

From emails

[M. Appling, Denton](#)

"I heard (and then read) the Courtney Collins story yesterday about Natalie Berquist and her son, who are about to be forced out of their apartment (One Crisis Away). My husband and I want to donate money to Natalie and her son...We were very moved by the story and would like to help."

[M. Adamczyk, Allegiant Wealth Management/MassMutual, Dallas](#)

"I learned a good deal from both this evening program [*One Crisis Away* public forum] and all the research and programming that preceded it on KERA, mostly on the radio. Thanks for all you are doing to address the problem of asset poverty, income poverty and the unjust and increasing uneven distribution of the benefits of our great country."

From Facebook

[E. Lorenzo](#)

"This was so fantastic, touching every emotion. The information was great, but the best was the view into the lives of the families. Made me realize the face of those struggling is that of our co-workers, friends, and neighbors."

From Twitter

[L. Coleman](#) "This program was incredible and raised my level of awareness to what I need to do for myself and others. Thank you."

[L. James](#) "'A child who has hope often reads on grade level.' Let's build hope!"

[G. Smith](#) "Working poor need holistic and comprehensive services to exit the #OneCrisisAway predicament."
